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"UZBEKISTAN'S STRATEGY FOR ARTIFICIAL INTELLIGENCE TO 2030: BUILDING A DOMESTIC AI BUSINESS ECOSYSTEM"

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Annotation: This article examines the Strategy for the Development of Artificial Intelligence Technologies until 2030, approved by Presidential Resolution No. PP-358 of October 14, 2024, and asks whether the policy framework Uzbekistan has built since 2021 is capable of producing a domestic AI business ecosystem rather than a set of state technology projects. The Strategy sets measurable targets: raising the volume of AI-based software products and services from USD 10 million to USD 1.5 billion by 2030, increasing the number of IT Park residents specializing in AI from 10 to 50, implementing 185 AI projects across sectors, training 1,000 qualified AI specialists, opening 10 AI research laboratories, and placing Uzbekistan among the top 50 countries in the Government AI Readiness Index. Progress on the last indicator has been fast: Uzbekistan rose from 87th place in 2023 to 70th in 2024 and 62nd of 195 countries in the 2025 edition of the index published by Oxford Insights. The surrounding ecosystem has also grown. According to the presidential press service, the country's IT service exports rose from USD 170 million in 2020 to USD 1 billion, IT Park counted more than 2,800 resident companies in July 2025, and residents' service exports reached USD 392.5 million in the first half of 2026, about 30 percent more than a year earlier. In January 2026 the President signed Law No. ZRU-1115, the country's first AI-specific amendments to its information and administrative legislation, and in November 2025 Uzbekistan and the United Arab Emirates launched the "Five Million AI Leaders" project, aimed at training 4.75 million school students, 150,000 teachers, and 100,000 civil servants in AI by 2030. The article argues that the Strategy's central weakness is not ambition but structure: its priority sectors are largely state-led, its talent targets separate mass literacy from specialist depth, its revenue goal lacks published progress data, and its compute infrastructure is still under construction. Converting the Strategy into a private AI business ecosystem will depend on closing these four gaps.

Keywords: Artificial intelligence; Uzbekistan; AI strategy 2030; PP-358; PP-4996; IT Park; digital economy; Government AI Readiness Index; Oxford Insights; ZRU-1115; AI regulation; data centers; AI talent; Five Million AI Leaders; Central Asia; technology entrepreneurship.

What Does a National AI Strategy Mean for a Domestic AI Business Ecosystem, and Why Does It Apply to Uzbekistan?

A national AI strategy is a government's statement of how it intends to develop, adopt, and govern artificial intelligence: which sectors it will prioritize, what infrastructure it will build, how it will train people, and what rules it will apply. A "domestic AI business ecosystem" is a narrower and harder outcome. It exists when private companies inside a country build, sell, and export AI products to paying customers, supported by local talent, computing capacity, data, capital, and a legal environment that allows them to operate with confidence. The two are related but not identical. A government can meet many of its strategy targets through public-sector projects, such as AI in tax administration or medical imaging in state hospitals, without producing a single commercially independent AI company. The test of a strategy's business impact is therefore whether the state's investment creates markets, skills, and infrastructure that private firms can use on their own. Uzbekistan presents a clear case for this test because its AI policy has moved in a short time from a general digitalization agenda to a detailed, quantified

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plan. Presidential Decree No. UP-6079 of October 5, 2020 approved the "Digital Uzbekistan-2030" strategy, which set the goal of placing the country among the top 30 in the United Nations E-Government Development Index by 2030. In February 2021, Presidential Resolution No. PP-4996 of February 17, 2021, "On measures to create conditions for the accelerated introduction of artificial intelligence technologies," made AI a policy area of its own. It provided for a Research Institute for the Development of Digital Technologies and Artificial Intelligence, introduced AI courses at no fewer than 15 leading higher education institutions from the 2021/2022 academic year, identified healthcare, agriculture, finance, and energy as priority sectors, and created a special legal regime within IT Park under which residents could test AI solutions that existing legislation might otherwise restrict. The 2024 Strategy builds on that foundation with numerical targets, an action plan, and dedicated financing, which makes it possible, for the first time, to measure Uzbekistan's AI policy against its own stated goals.

The 2030 Strategy: Targets, Priorities, and Financing

Presidential Resolution No. PP-358 of October 14, 2024 approved the Strategy for the Development of Artificial Intelligence Technologies until 2030, together with an action plan for 2024–2026, and entered into force on October 17, 2024. Its first appendix sets eleven indicators with milestones for 2026, 2028, and 2030. The headline business target is the volume of AI-based software products and services, which the Strategy records at USD 10 million at the time of adoption and aims to raise to USD 200 million in 2026, USD 500 million in 2028, and USD 1.5 billion in 2030. The number of AI projects implemented across sectors and industries is planned to reach 57 in 2026, 100 in 2028, and 185 in 2030. The number of IT Park residents working specifically in AI is to rise from 10 to 20, 35, and 50 over the same milestones. Talent indicators include raising the number of qualified AI specialists trained from 572 to 1,000 by 2030 and the number of professors with PhD or DSc degrees in AI at IT universities to 40. Data indicators include increasing interagency open datasets available for AI projects from 16 to 200 and datasets on the Open Data Portal from 5,777 to 10,000. Public-sector indicators call for AI-based services to make up 10 percent of services on the Unified Interactive Public Services Portal, AI to account for 10 percent of capacity in government data centers, and 10 AI research laboratories to be in operation by 2030. The final indicator is international: moving Uzbekistan from 87th place in the Government AI Readiness Index to 75th in 2026, 65th in 2028, and the top 50 by 2030. The Strategy names five priority directions for AI use: banking and finance, including fraud prevention, creditworthiness assessment, and market forecasting; tax and customs administration, including reducing the shadow economy and identifying suspicious customs operations; healthcare, including diagnosis, treatment selection, and medical image analysis; agriculture, including yield forecasting and crop and livestock monitoring; and energy, including resource management, distribution optimization, and renewable energy demand forecasting. For financing, the resolution provides an interest-free loan of USD 50 million from the Fund for Reconstruction and Development of the Republic of Uzbekistan to the Ministry of Digital Technologies, for a term of five years beginning January 1, 2025. The action plan assigns specific deadlines, including the creation of a Big Data database by September 1, 2025, approval of the design of a GPU computing cluster by August 2025, the harmonization of nine national AI standards with international standards during 2025–2026, and the creation of six AI laboratories at universities and research institutes. The Ministry of Digital Technologies is the lead implementing body, with oversight assigned to the Prime Minister.

Where the Ecosystem Stands in 2026

The most visible measure of progress is the international readiness ranking, and on that measure Uzbekistan has moved faster than its own plan required. According to the Ministry of

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Digital Technologies, the country ranked 87th in the Government AI Readiness Index in 2023, 70th in 2024, and 62nd in 2025, a rise of 25 places in two years. The 2025 edition of the index, published by Oxford Insights, assessed 195 countries and gave Uzbekistan a score of 54.69. The Strategy's 2026 milestone of 75th place has therefore already been exceeded, and the 2028 milestone of 65th place was passed three years early. The broader technology sector on which an AI business ecosystem depends has also grown. IT Park, the government's technology park and tax regime for IT companies, offers residents a 0 percent value added tax rate and a 7.5 percent personal income tax rate for employees, compared with the standard 12 percent, with incentives stated to apply until 2040, according to the state investment agency. On July 1, 2025, the presidential press service reported that Uzbekistan's IT service exports had grown from USD 170 million in 2020 to USD 1 billion, that IT Park had more than 2,800 residents, including 752 foreign companies, and that about 40,000 young specialists worked in the sector. In the first half of 2026, IT Park residents' service exports reached USD 392.5 million, an increase of USD 90.3 million, or about 30 percent, over the same period of 2025. Human-capital programs have expanded alongside these numbers. The “One Million Uzbek Coders” project, launched on November 21, 2019 with the Dubai Future Foundation, offered free online training in data analytics, Android development, and front-end and full-stack development. On November 28, 2025, Uzbekistan and the United Arab Emirates launched the “Five Million AI Leaders” project, reported in some coverage as “Five Million AI Prompters,” which aims to train 4.75 million school students, 150,000 teachers, and 100,000 government employees in AI by 2030. The government announced USD 100 million for integrating AI into school, vocational, and higher education, and an annual presidential AI competition that will select 100 top school students for internships at technology companies in the United States, the UAE, and Europe.

The Legal Framework: Law No. ZRU-1115

For private companies, legal certainty matters as much as subsidies, and in 2026 Uzbekistan adopted its first AI-specific legislation. The draft law passed its first reading in the Legislative Chamber of the Oliy Majlis on April 15, 2025, with 150 votes in favor, none against, and 3 abstentions. Ilhom Abdullayev, chair of the chamber's Committee on Innovative Development, Information Policy and Information Technologies, described it as a law that is “not prohibitive, not regulatory, not restrictive.” On January 21, 2026, President Shavkat Mirziyoyev signed it as Law No. ZRU-1115, which amends the Law “On Informatization” and the Code of Administrative Liability rather than creating a stand-alone AI code. The law defines artificial intelligence as a set of technological solutions that allow systems to imitate human knowledge and skills, learn independently, search for solutions, and produce results comparable to human intellectual activity in specific tasks. It prohibits state bodies and organizations from relying exclusively on AI-generated conclusions when making decisions that affect human rights and freedoms, which makes human oversight mandatory in legally significant processes. It also introduces administrative fines of 50 to 100 base calculation units for the unlawful processing or dissemination of personal data using AI, with possible confiscation of the tools used. The Ministry of Digital Technologies is the authorized state body for the sector. For an AI company, this framework has two practical consequences. It sets a clear limit on fully automated decision-making in the public sector, which shapes how AI vendors design products sold to government customers, and it attaches a concrete financial penalty to misuse of personal data, which makes data governance a commercial requirement rather than a matter of good practice. At the same time, the law is deliberately light: it does not establish a separate AI regulator or a licensing regime, which lowers entry barriers for startups but leaves many operational questions, such as

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liability for errors in commercial AI products, to be resolved through general law and future by-laws.

Infrastructure: Data and Compute

An AI business ecosystem requires computing capacity close to its customers, and in this area Uzbekistan's plans are well advanced but not yet complete. The Strategy's action plan called for the design of a GPU computing cluster to be approved by August 2025 and for AI to account for 10 percent of capacity in government data centers by 2030. The most concrete private project is TAS-1, a 12-megawatt AI-ready data center in Tashkent developed by the Saudi company DataVolt in partnership with the Ministry of Digital Technologies. Construction began in May 2024, DataVolt has stated that the facility will come online in late 2026, and on June 17, 2026 the company announced USD 150 million in project financing from the European Bank for Reconstruction and Development, the OPEC Fund for International Development, Proparco, and the German Investment and Development Company. Beeline Uzbekistan may become a major tenant under a non-binding memorandum of understanding. In May 2024, the Uzbek ministry also stated that a foreign partner would invest USD 5 billion by 2030 in two additional 250-megawatt data centers. Data availability is the second half of infrastructure. The Strategy's targets of 200 interagency open datasets for AI projects and 10,000 datasets on the national Open Data Portal by 2030, together with the planned Big Data database, address a real constraint: AI models for Uzbek-language services, local agriculture, or domestic financial risk cannot be trained on foreign data alone. Whether those datasets become accessible to private companies on clear terms, and not only to state agencies, will determine how much of this infrastructure benefits the business ecosystem.

Reading the Policy and Market Trends Together

Taken together, the evidence shows a policy framework that is coherent and moving quickly, built on a technology sector that is already export-oriented and growing. The sequence is clear: a general digitalization strategy in 2020, an AI-specific resolution with a regulatory sandbox in 2021, a quantified strategy with financing in 2024, mass AI education and a national legal framework in 2025 and 2026, and the first large AI-ready data center expected online in late 2026. The 25-place rise in the Government AI Readiness Index over two years reflects this institutional activity. However, readiness indices largely measure government capacity, policy, and infrastructure; they do not directly measure whether private AI companies are earning revenue. The Strategy's own business indicators set a much steeper path. Moving the volume of AI products and services from USD 10 million to USD 1.5 billion in six years would require a roughly 150-fold increase, and the 2026 milestone alone, USD 200 million, is twenty times the starting point. By comparison, the entire IT Park export base reported USD 392.5 million for the first half of 2026 across all categories of IT services. The gap between those two figures is the clearest indication of where the next phase of policy must focus: not on whether the state can adopt AI, but on whether domestic firms can build AI businesses large enough to meet the Strategy's commercial targets.

Current Problems in Uzbekistan's AI Ecosystem Model

1. “A Revenue Target Without Published Progress Data”

The Strategy sets a 2026 milestone of USD 200 million in AI-based software products and services, yet no public source reviewed for this article reports the current value of this indicator, how it is measured, or whether it covers domestic sales, exports, or public procurement. IT Park reports aggregate export figures for all IT services, but not a separate figure for AI. Without a published methodology and regular reporting, it is not possible to tell whether the most important

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commercial target of the Strategy is on track, or to distinguish genuine AI products from conventional software relabeled as AI.

2. "Mass AI Literacy Separated From Specialist Depth"

The "Five Million AI Leaders" project aims to train 5 million people by 2030, while the Strategy's own indicator for qualified AI specialists rises only from 572 to 1,000, and the target for AI professors with doctoral degrees at IT universities is 40. Broad AI literacy creates users and customers, but AI companies are built by a much smaller group of engineers and researchers capable of developing and deploying models. A target of 1,000 specialists by 2030 is modest relative to an industry expected to generate USD 1.5 billion in revenue.

3. "A Demand Model Led by the State"

The Strategy's five priority directions, banking and finance, tax and customs, healthcare, agriculture, and energy, are sectors in which the state is either the main customer or the main regulator, and several of the action plan's measures assign implementation to ministries, the Central Bank, and banks with state participation. The indicator for private AI companies, the number of AI-specialized IT Park residents, rises only from 10 to 50 by 2030. A state-led demand model can launch an ecosystem, but it can also concentrate revenue in a small number of government contracts and leave private firms dependent on public procurement rather than on commercial customers at home and abroad.

4. "Compute Capacity Still Under Construction"

The first large AI-ready commercial data center, TAS-1, is scheduled to come online only in late 2026, with 12 megawatts of capacity, while the larger 250-megawatt projects announced in May 2024 are planned for completion by 2030. Until domestic capacity is available, Uzbek AI startups must rely on foreign cloud services for model training and deployment, which raises costs, exposes them to currency risk, and complicates compliance with personal-data rules now backed by fines under Law No. ZRU-1115.

Solutions and the Path Forward

Four responses correspond to the problems identified above. First, the Ministry of Digital Technologies should publish an annual report on the Strategy's eleven indicators, with a defined methodology for the AI products and services target that separates domestic commercial sales, exports, and public procurement, and IT Park should report AI-specific revenue and exports for its AI-specialized residents. This would turn the USD 1.5 billion target from a declaration into a figure that investors, companies, and international partners can track, building on the reporting discipline the 2024–2026 action plan already imposes on ministries. Second, the talent pipeline should be connected from bottom to top. The "Five Million AI Leaders" project and the annual presidential AI competition can identify talented students early; a defined share of the El-Yurt Umidi Foundation's overseas scholarships, which the Strategy already involves, and of the planned university AI laboratories could then be directed toward advanced AI study, with the 1,000-specialist target revised upward to reflect the size of the commercial goal. Third, public demand should be used to build private capability rather than replace it. Government AI projects in the five priority sectors could be procured through open, competitive tenders that favor IT Park residents and local AI startups, with contracts structured so that the resulting products can also be sold to private customers and abroad. Opening interagency datasets to IT Park residents on clear, privacy-compliant terms would give private firms the same raw material that state projects use. Fourth, the transition period before domestic compute capacity is fully available should be managed deliberately. A program of subsidized access for AI startups to the planned GPU cluster and to the TAS-1 facility once it opens, together with guidance from the Ministry of Digital

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Technologies on how to comply with Law No. ZRU-1115 when using foreign cloud services, would reduce the cost and legal uncertainty that currently fall on the smallest companies.

Conclusion

Uzbekistan's Strategy for the Development of Artificial Intelligence Technologies until 2030 is a specific and well-sequenced policy. It builds on the 2020 "Digital Uzbekistan-2030" strategy and the 2021 resolution on accelerated AI adoption, sets eleven measurable indicators with milestones for 2026, 2028, and 2030, provides USD 50 million in dedicated financing, and is now supported by a national AI law, a mass education program, and the first AI-ready commercial data center. Its early results are real: a rise from 87th to 62nd place in the Government AI Readiness Index in two years, a technology sector whose service exports grew from USD 170 million in 2020 to USD 1 billion, and IT Park exports that grew by about 30 percent in the first half of 2026. Yet the Strategy's most ambitious goal is commercial, not institutional: raising AI products and services from USD 10 million to USD 1.5 billion by 2030. Meeting that goal will require more than government adoption of AI. It will require transparent measurement of AI revenue, a talent pipeline that produces specialists as well as users, public procurement that strengthens private firms rather than substituting for them, and affordable domestic computing capacity. If those conditions are met, the Strategy can become the foundation of a domestic AI business ecosystem able to compete in the region and beyond. If they are not, Uzbekistan may reach the top 50 in AI readiness while its AI industry remains small, which is the distinction this article identifies as the central test of the Strategy's second half.

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