



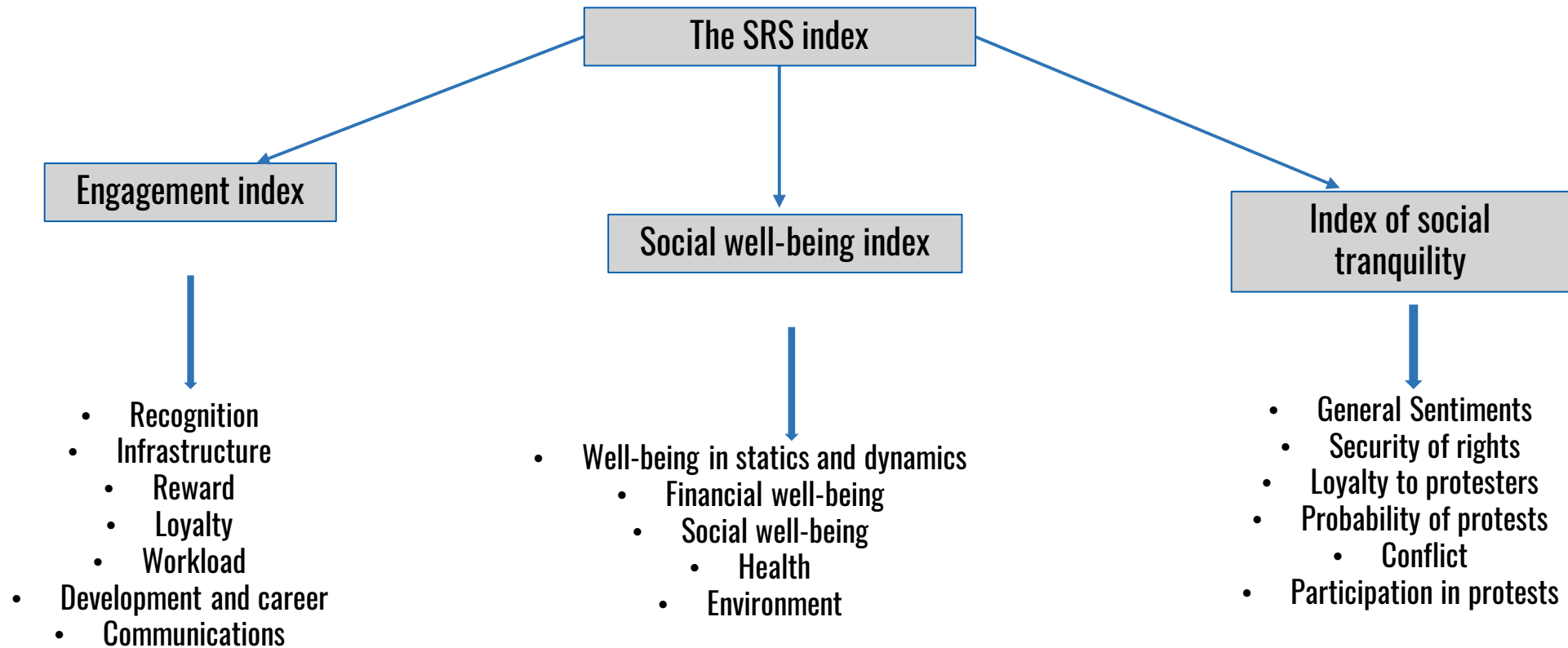
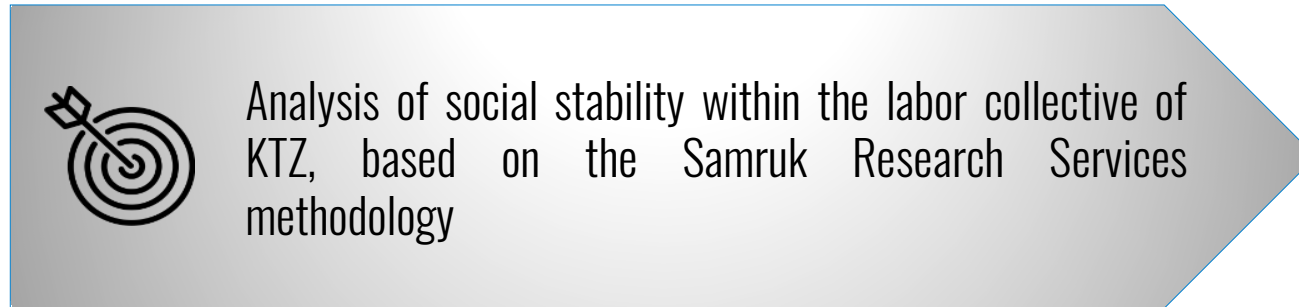
**ҚАЗАҚСТАН
ТЕМІР
ЖОЛЫ**

SRS 2024

SAMRUK RESEARCH SERVICES

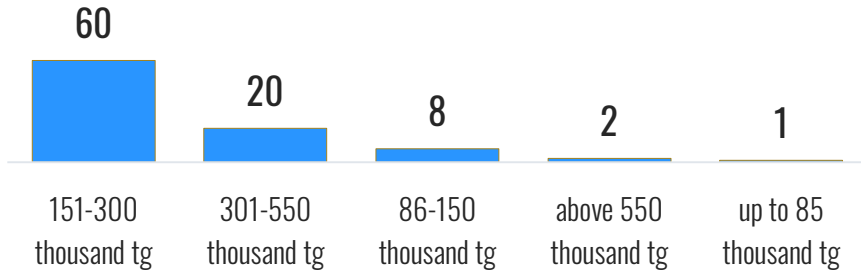
**JSC «NC «KAZAKHSTAN
TEMIR ZHOLY»**



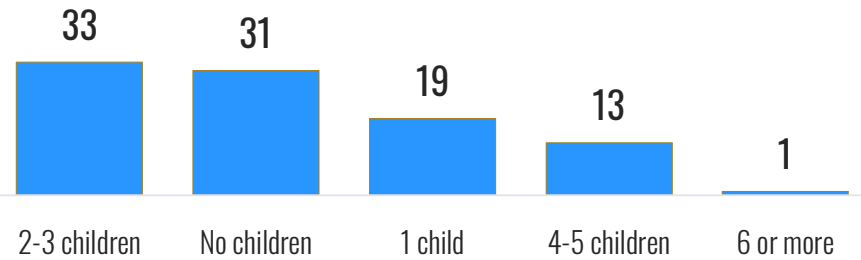


PROFILE OF RESPONDENTS

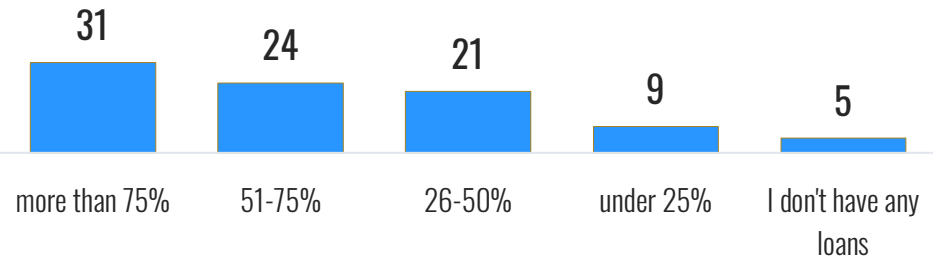
AVERAGE MONTHLY INCOME, %



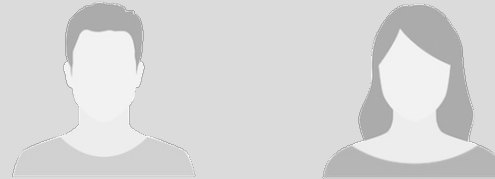
NUMBER OF CHILDREN UNDER 18, %



AMOUNT OF LOAN PAYMENTS, %

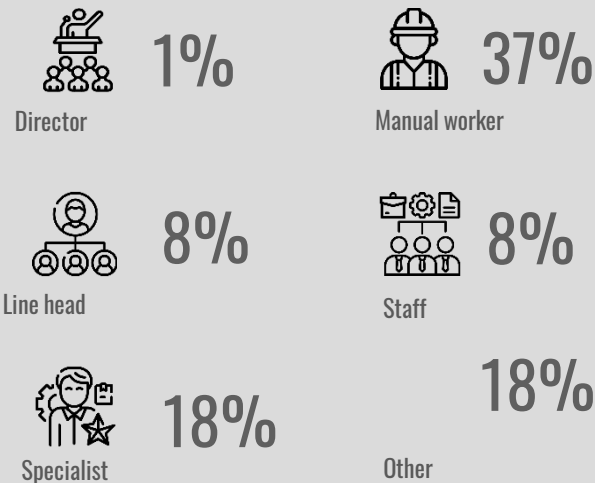


Gender structure

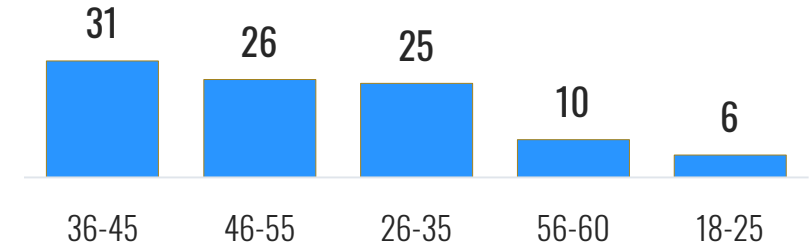


74% **26%**

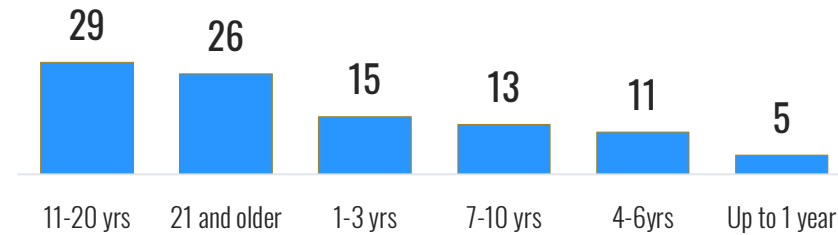
- The survey was conducted from December 10 to December 24, 2024.
- CAWI (online survey)



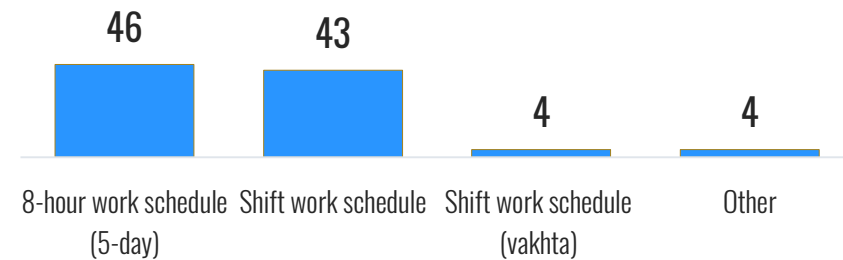
AGE, %



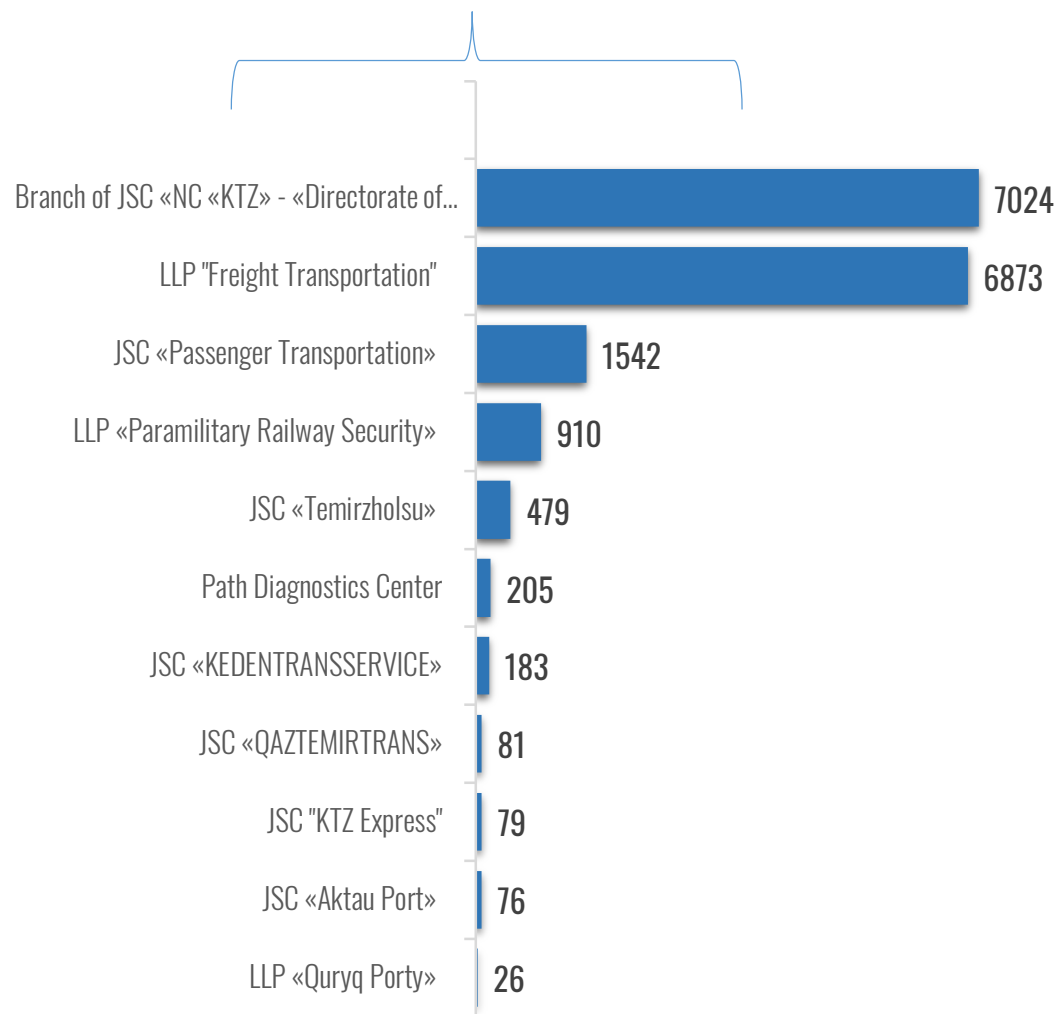
WORK EXPERIENCE, %



WORK SCHEDULE, %



17 478 were surveyed



Points	Social stability level	Description
92 and above	High	The company has achieved high performance in each rating and is taking measures to further maintain and improve/strengthen it.
81-92	Above average	The company pays increased attention to social development issues. The index indicators are high.
59-81	Average	The company quite successfully solves social problems that arise in the course of its activities, but there are certain areas that require solutions, or prerequisites for deepening and destabilizing the situation in the team.
48-59	Below average	The company devotes insufficient time to personnel development and social policy, as well as issues of strengthening social stability.
Below 48	Low	The company does not devote enough time to issues of strengthening social stability. The likelihood of an unstable situation arising is quite high.

	Index SRS 2024, %	Δ to 2023		Engagement Index, %	Social Well-being Index,%	Index of Social tranquility,%
		↑	↓			
Kazakhstan Temir Zholy	69	↑	3	66	59	83
KTZ Express	86	↑	12	87	79	91
Kaztemirtrans	79	↑	2	77	72	88
Aktau Port	78	↓	-8	76	68	92
Kedentransservice	74	↑	6	69	68	88
Path Diagnostics Center	73	↓	-1	70	63	87
Quryq Porty	72	↓	-1	74	59	80
KTZ - Directorate of the backbone network – CZHS	70	↑	6	69	60	84
Freight Transportation	68	↑	3	64	58	83
Temirzholsu	68	↓	-1	65	62	82
Paramilitary Railway Security	66	-	0	63	56	84
Passenger Transportation	64	↑	3	59	59	80

4 companies have

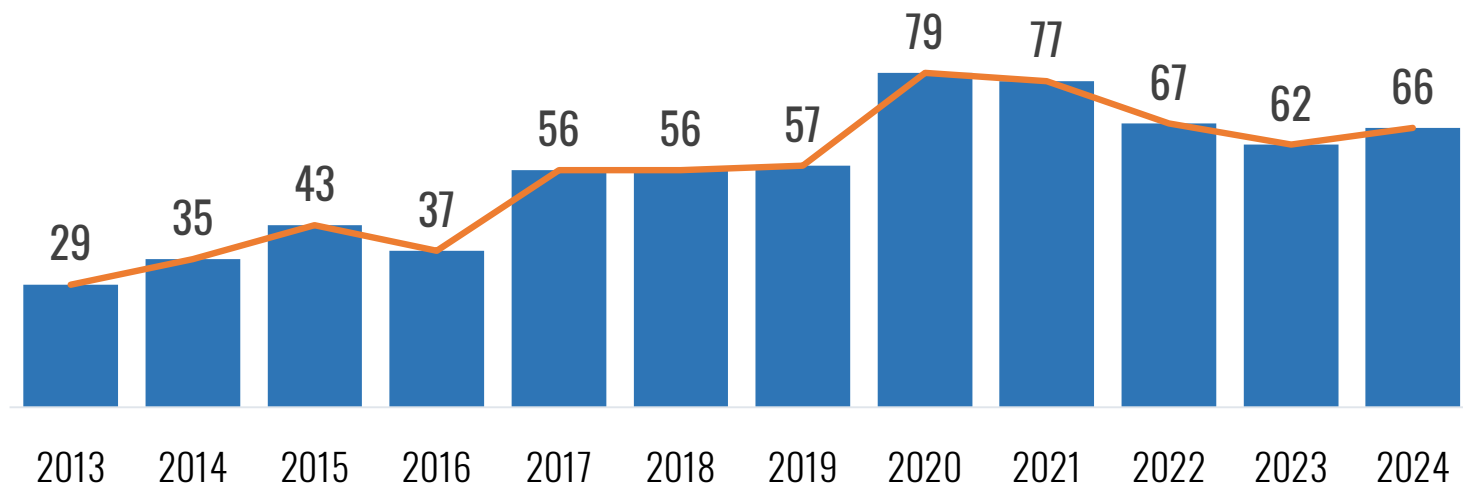
negative dynamics from -1 до -8 p.p.
The most significant value in JSC «Aktau Port» (-8 p.p.)

7 companies have

positive dynamics from +2 to +12 p.p.
The most significant value in JSC «KTZ Express» (+12 p.p.).

The situation in «Paramilitary Railway Security» hasn't changed

Employee engagement index over time, (%)



▲ There has been positive dynamics since 2023 within the range of 1 to 17 percentage points (9 p.p). The most significant improvement was seen in KTZ Express (87%).

▼ Negative dynamics since 2023 within the range of -10 percentage points (1 subsidiary). The most significant values – in JSC «Aktau Port» (-10 p.p.)

90%

Employees do not report experiencing moral or psychological pressure

92%

Have a clear understanding of what is expected in terms of performance outcomes

92%


Employees feel protected by the company's safety protocols

ENGAGEMENT INDEX

KEY INDICATORS:

	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023			2024
Kazakhstan Temir Zholy	29	35	43	37	56	56	57	79	77	67	62	↑	4	66
KTZ Express	-	-	-	-	-	-	50	82	92	88	70	↑	17	87
Kaztemirtrans	41	35	42	43	-	-	55	86	85	82	76	↑	1	77
Aktau Port	-	-	-	-	-	-	-	-	-	88	86	↓	-10	76
Quryq Porty	-	-	-	-	-	-	-	-	-	-	71	↑	3	74
Path Diagnostics Center	-	-	65	37	60	41	55	88	81	82	70	-	-	70
KTZ - Directorate of the backbone network – CZHS	30	38	43	42	59	53	62	84	81	68	62	↑	7	69
Kedentransservice	-	-	-	-	-	-	-	-	89	82	62	↑	7	69
Temirzholsu	-	-	-	-	-	-	-	-	-	79	64	↑	1	65
Freight Transportation	25	32	42	36	57	65	62	76	74	62	62	↑	2	64
Paramilitary Railway Security	-	-	-	-	-	-	-	-	-	78	60	↑	3	63
Passenger Transportation	20	20	39	28	45	35	18	76	71	60	56	↑	3	59

 The highest indicator –KTZ Express (87%)

 Low indicator – Passenger transportation (lowest engagement index) with an indicator of 59%.

1 company

The indicator of engagement index is below the company average:
Passenger Transportation (59%)

In 8 companies

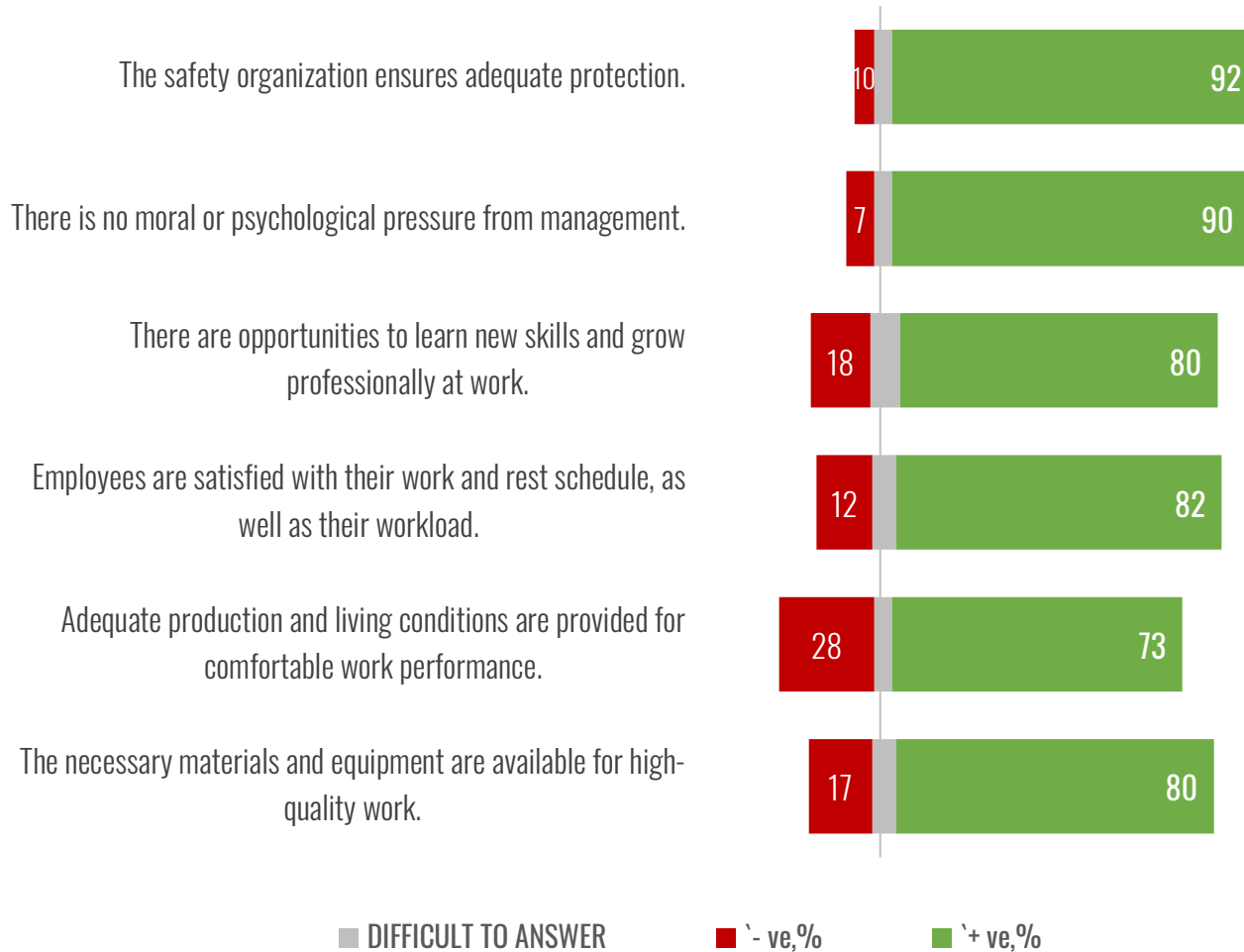
Employee engagement indicators at the enterprise are at an average level, with the following results:

Freight Transportation (64%), KTZ - Directorate of the backbone network – CZHS (69%), Kedentransservice (69%), Temirzholsu (65%), Kaztemirtrans (77%), Path Diagnostics Center (70%), Aktau Port (76%), Quryq Porty (74%), Paramilitary Railway Security (63%)

In 1 companies

Engagement indicators are above the enterprise average :
KTZ Express (87%).

ENGAGEMENT INDEX



KEY INDICATORS:



17-20%

Employees of Paramilitary Railway Security, KTZ – Directorate of the Backbone Network - CZHS report a lack of necessary materials and equipment

20-47%

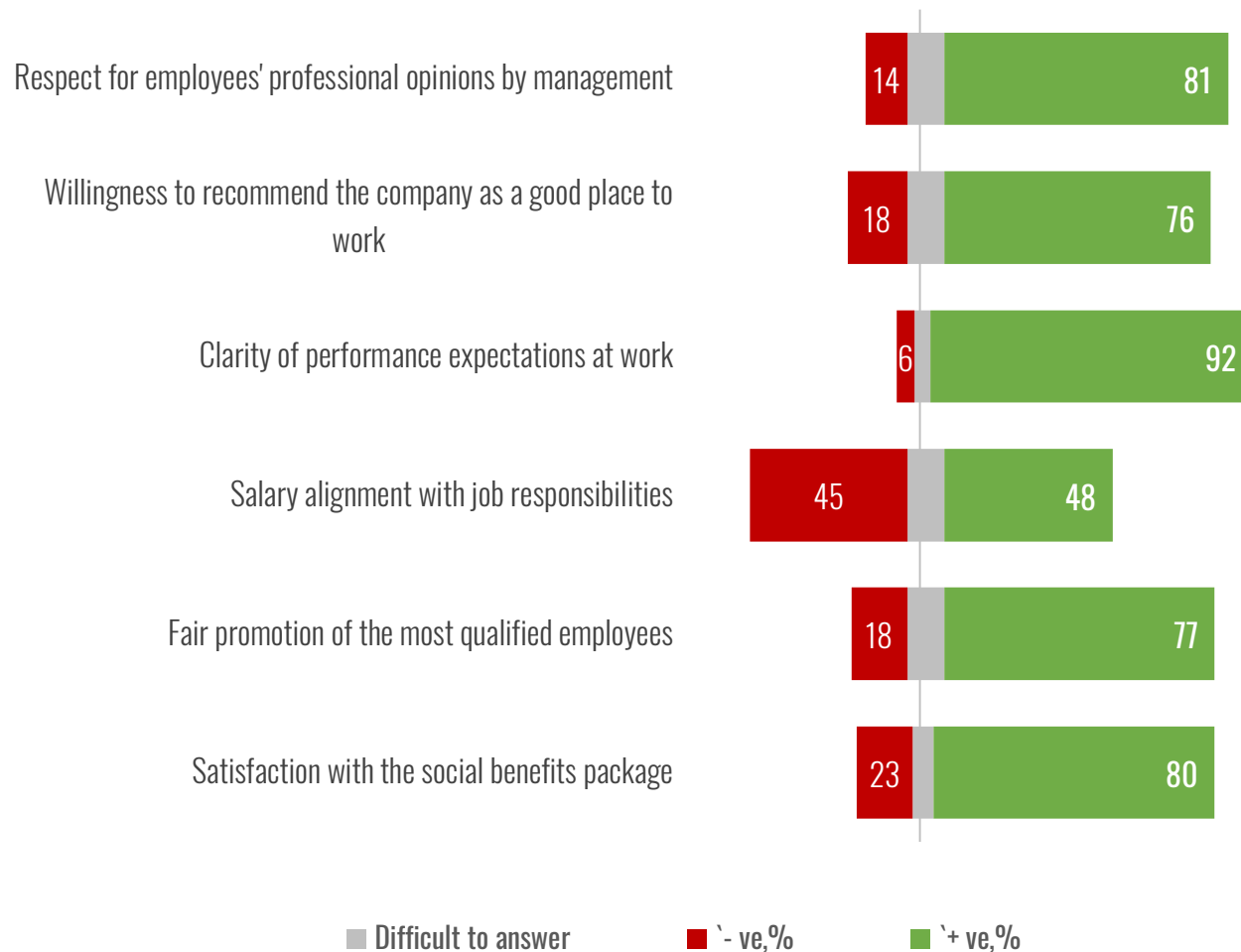
Employees of all subsidiaries and affiliates, except for Aktau Port, Quryq Porty, and KTZ Express, report a lack of adequate working and living conditions

11-30%

Employees across all subsidiaries and affiliates lack sufficient opportunities for learning and development, except for Aktau Port

MOST ENGAGED: KTZ Express

NOT ENGAGED:
 Passenger Transportation
 Paramilitary Railway Security



28-49%

Workers do not consider their pay to be aligned with the nature or demands of their work, according to feedback from subsidiaries and affiliates

4-35%

workers are dissatisfied with the social benefits package

11-25%

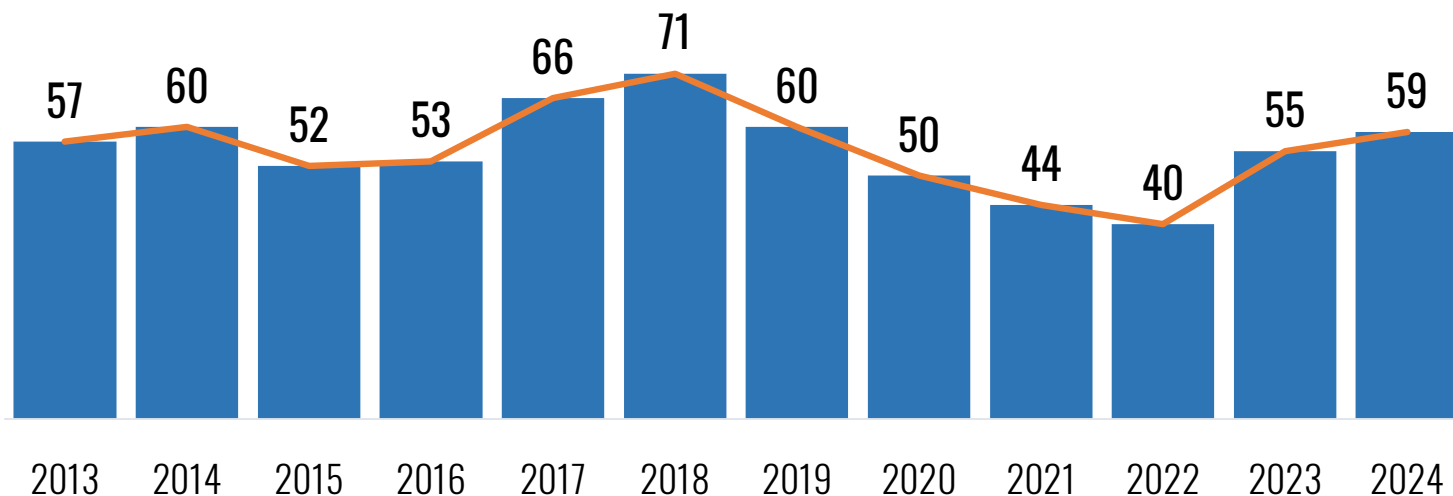
employees perceive the promotion process as lacking transparency

3% - 23%

Employees report low readiness to recommend the company to others

Unfair payment is most frequently reported by male manual workers aged 36–45, with 11–20 years of work experience, 2–3 children under 18, and a monthly income of 151,000–300,000 tenge

Social well-being index over time, (%)



▲ There has been positive dynamics since 2023, with an increase ranging from 2 to 14 percentage points across 7 subsidiaries and affiliates. The most significant improvement was observed in KTZ Express, reaching 79%

▼ There has been negative dynamics since 2023, with a decline ranging from -1 to -10 percentage points across 5 subsidiaries and affiliates. The largest decrease was observed in JSC Aktau Port, falling to 68%

85-99%

SATISFIED WITH LIFE IN GENERAL

81-100%

MEDICAL CHECK-UP OVER THE PAST YEAR

68-91%

LIVE COMFORTABLY IN A CITY/VILLAGE

SOCIAL WELL-BEING INDEX

KEY INDICATORS:



	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023			2024
Kazakhstan Temir Zholy	57	60	52	53	66	71	60	50	44	40	55	↑	4	59
KTZ Express	-	-	-	-	-	-	67	60	65	69	65	↑	14	79
Kaztemirtrans	50	57	60	57	-	-	59	48	53	48	63	↑	9	72
Kedentransservice	-	-	-	-	-	-	-	-	59	46	60	↑	8	68
Aktau Port	-	-	-	-	-	-	-	-	-	81	78	↓	-10	68
Path Diagnostics Center	-	-	64	51	72	74	72	60	46	55	68	↓	-5	63
Temirzholsu	-	-	-	-	-	-	-	-	-	50	64	↓	-2	62
KTZ» - «Directorate of the backbone network – CZHS	57	61	51	57	66	68	62	56	47	38	52	↑	8	60
Passenger Transportation	54	56	48	51	63	56	44	41	36	39	56	↑	3	59
Quryq Porty	-	-	-	-	-	-	-	-	-		66	↓	-7	59
Freight Transportation	57	58	51	52	68	77	64	46	42	37	56	↑	2	58
Paramilitary Railway Security	-	-	-	-	-	-	-	-	-	43	57	↓	-1	56

▲ The best indicator (despite the decrease) is KTZ Express (79%).

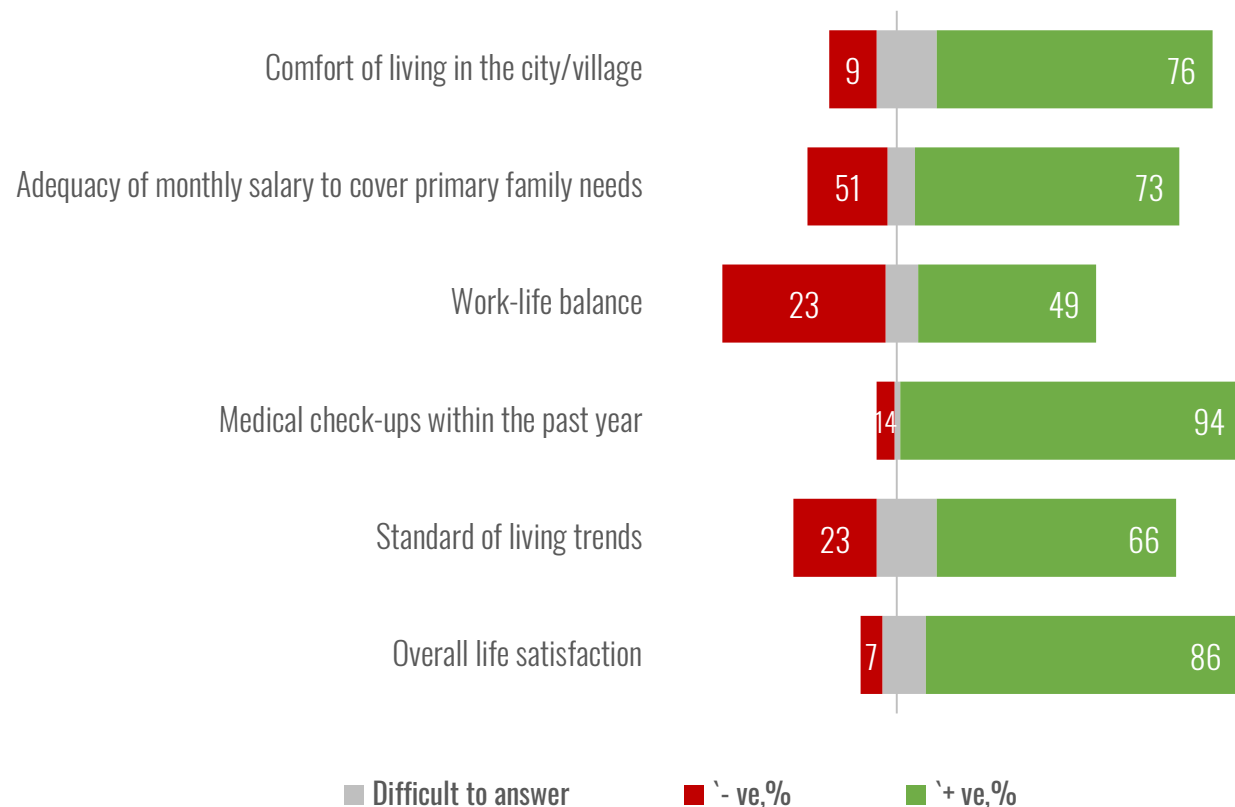
▼ Low indicator: Paramilitary Railway Security (the lowest index) with an indicator of 56%.

8 companies

Social well-being indicators are above the enterprise average :
Kedentransservice (68%), Temirzholsu (62%)
KTZ Express (79%), Kaztemirtrans (72%), Path Diagnostics Center (63%), Aktau Port (68%), Quryq Porty (59%),
KTZ» - Directorate of the backbone network – CZHS (60%).

3 companies

Social well-being indicator is below the company average:
Freight Transportation (58%), Passenger Transportation (59%),
Paramilitary Railway Security (56%).



In 11 companies

More than half of the employees experience financial difficulties, with percentages ranging from 26% to 62%. In Paramilitary Railway Security, over 60% of employees report financial challenges

6-24%

Employees of all subsidiaries and affiliates report finding it relatively difficult or challenging to balance work and personal life

38-68%

Employees of all subsidiaries and affiliates show an interest in public life, such as participation in political activities, volunteering, and sports and cultural events

WELL-BEING IS HIGH:
KTZ Express

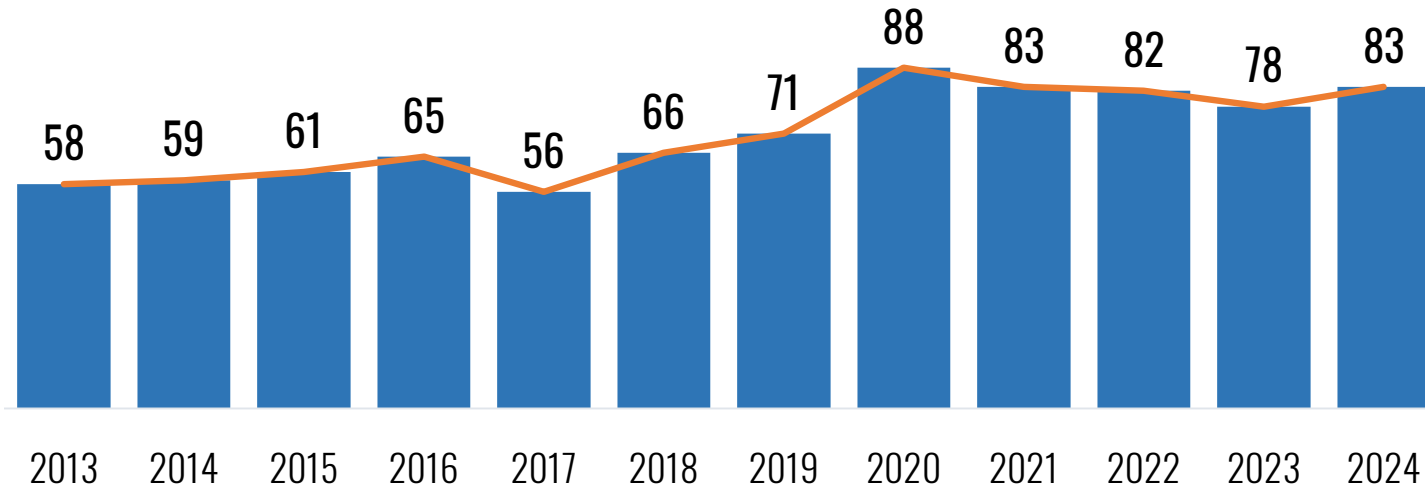
WELL-BEING IS LOW:
Freight Transportation
Paramilitary Railway Security

INDEX OF SOCIAL TRANQUILITY

KEY INDICATORS:



Social tranquility index over time, (%)



▲ Positive dynamics since 2023 ranging from 1 to 7 percentage points across 10 companies. The most significant improvements were observed in KTZ – Directorate of the Backbone Network – CZHS (84%) and Passenger Transportation (80%)

▼ Negative dynamics since 2023 are observed at Quryq Porty, with a decline of -1%

In turn, there here has been no changes within Kaztemirtrans

88-98%

have no experience participating in strikes

89-96%

Employees note a friendly and calm atmosphere within the company

65-94%

Deny the possibility of protests arising from employee dissatisfaction

INDEX OF SOCIAL TRANQUILITY

KEY INDICATORS:



▲ The highest indicator – Aktau Port (92%).

▼ Low indicator – Passenger transportation (lowest index of social tranquility) – Passenger transportation, Quryq Porty (the lowest index) with an indicator of 80%.

11 companies

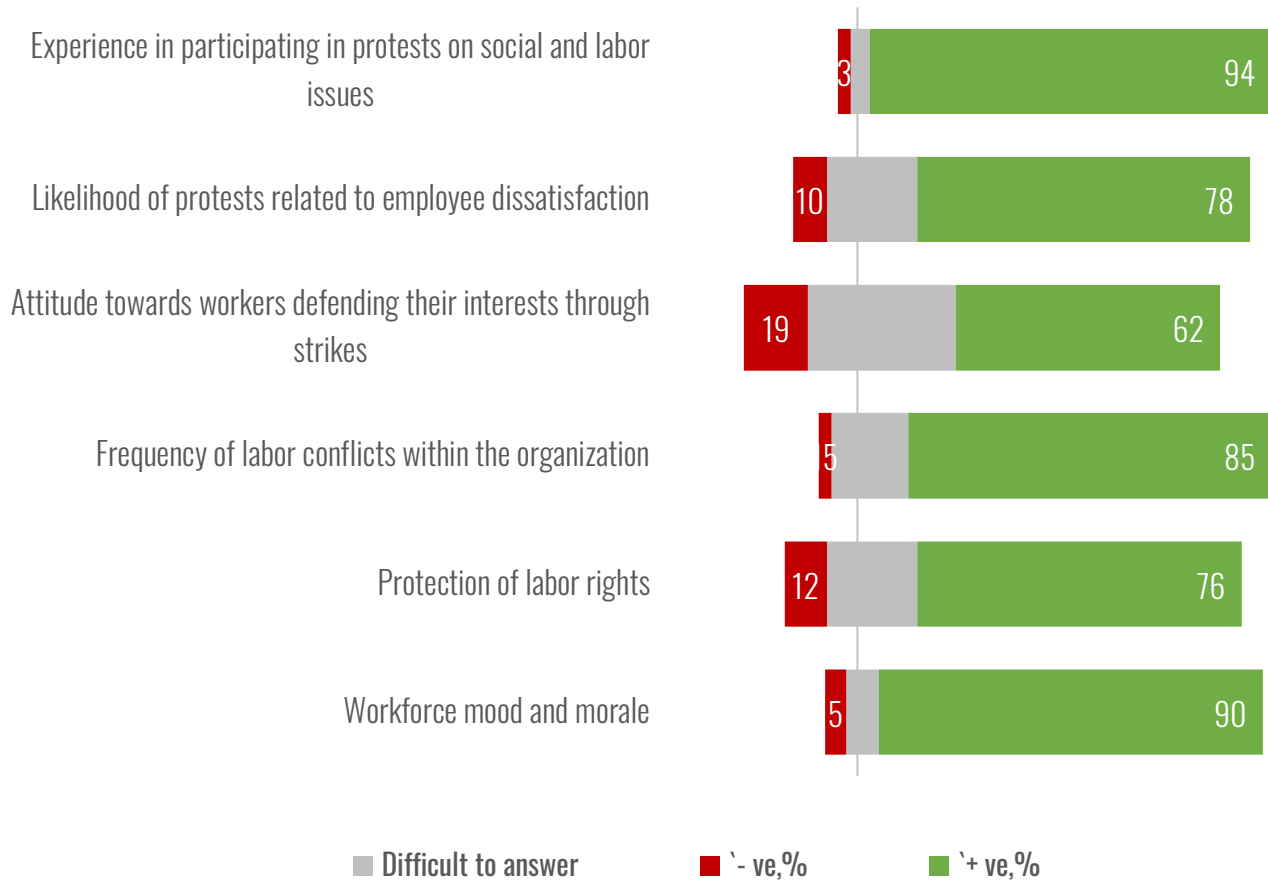
Social tranquility indicators are above the enterprise average:

Kedentransservice (88%), Temirzholsu (82%), Kaztemirtrans (88%), Path Diagnostics Center (87%), Paramilitary Railway Security (84%), KTZ Express (91%), Quryq Porty (80%), KTZ - Directorate of the backbone network – CZHS (84%), Freight Transportation (83%) and Passenger Transportation (80%).

	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023			2024
Kazakhstan Temir Zholy	58	59	61	65	56	66	71	88	83	82	78	↑	5	83
Aktau Port	-	-	-	-	-	-	-	-	-	88	91	↑	1	92
KTZ Express	-	-	-	-	-	-	68	88	88	86	86	↑	5	91
Kedentransservice	-	-	-	-	-	-	-	-	92	86	83	↑	5	88
Kaztemirtrans	56	59	63	63	-	-	75	87	85	91	88	-		88
Path Diagnostics Center	-	-	68	59	62	56	69	89	85	93	83	↑	4	87
KTZ - Directorate of the backbone network – CZHS	58	59	62	67	55	63	73	92	88	85	77	↑	7	84
Paramilitary Railway Security	-	-	-	-	-	-	-	94	96	85	80	↑	4	84
Freight Transportation	58	61	63	63	59	72	72	84	79	80	77	↑	6	83
Temirzholsu	-	-	-	-	-	-	-	-	-	88	80	↑	2	82
Passenger Transportation	58	55	60	66	50	53	56	85	76	68	73	↑	7	80
Quryq Porty	-	-	-	-	-	-	-	-	-	-	81	↓	-1	80

INDEX OF SOCIAL TRANQUILITY

KEY INDICATORS:



4%

of employees Quryq Porty, Kedentransservice report frequent conflicts in the organization.

7-20%

Employees of all subsidiaries and affiliates show loyalty to the protesters. In Kedentransservice, Kaztemirtrans, and KTZ – Directorate of the Backbone Network – CZHS, this includes every fifth employee

1-16%

of employees do not feel that their rights are protected.

The most 'calm': Aktau Port

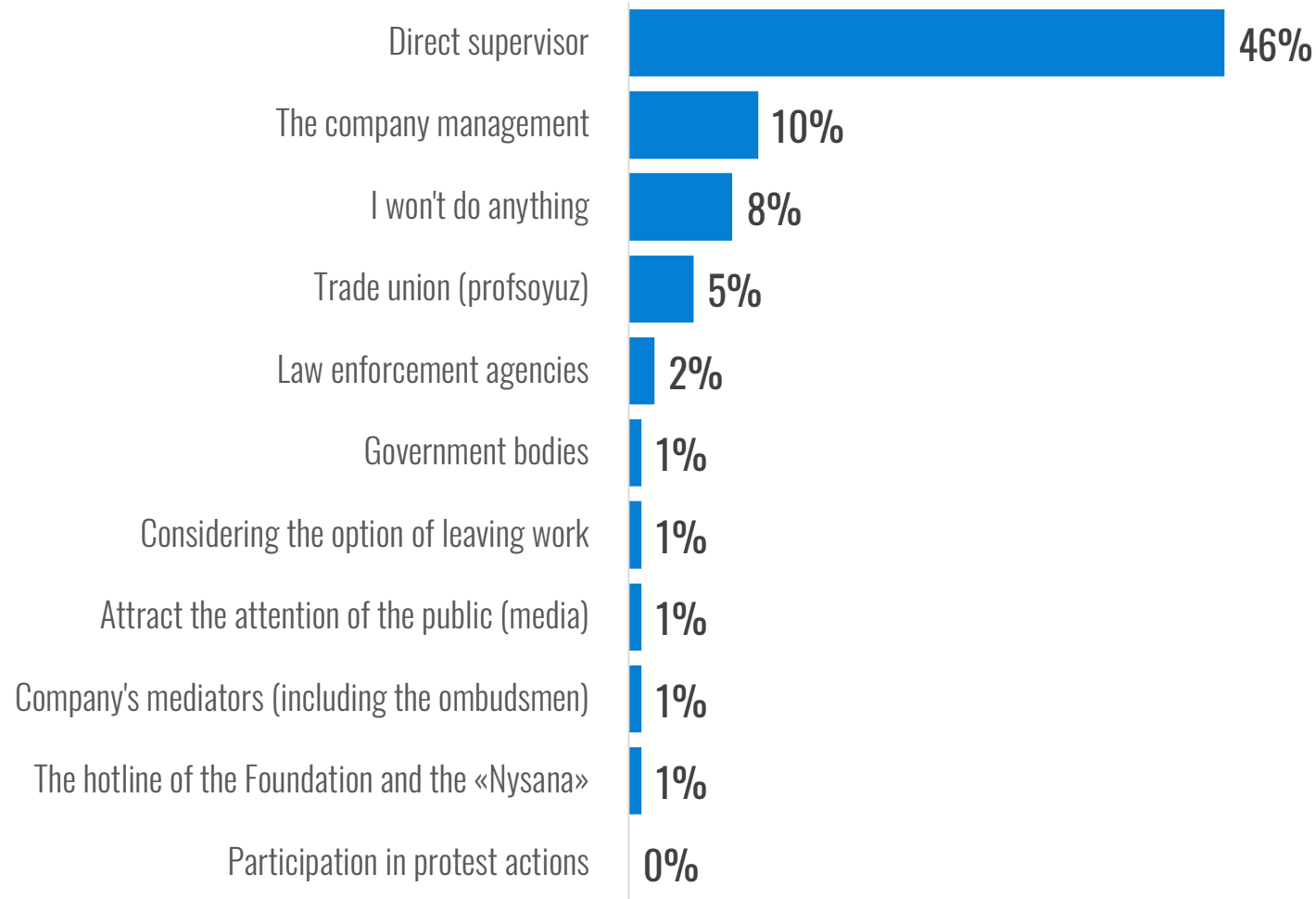
The least 'calm': Quryq Porty

MODEL OF ACTION IN CASE OF VIOLATION OF LABOR RIGHTS *

KEY INDICATORS:



Whom would you seek help from if your labor rights were violated?



in 52% of cases

Employees of Qaztemirtrans and KTZ Express will prefer to contact their immediate management.

in 8% of cases

employees of Quryq Porty would prefer to contact the trade union than the company's top management.

Passenger Transportation

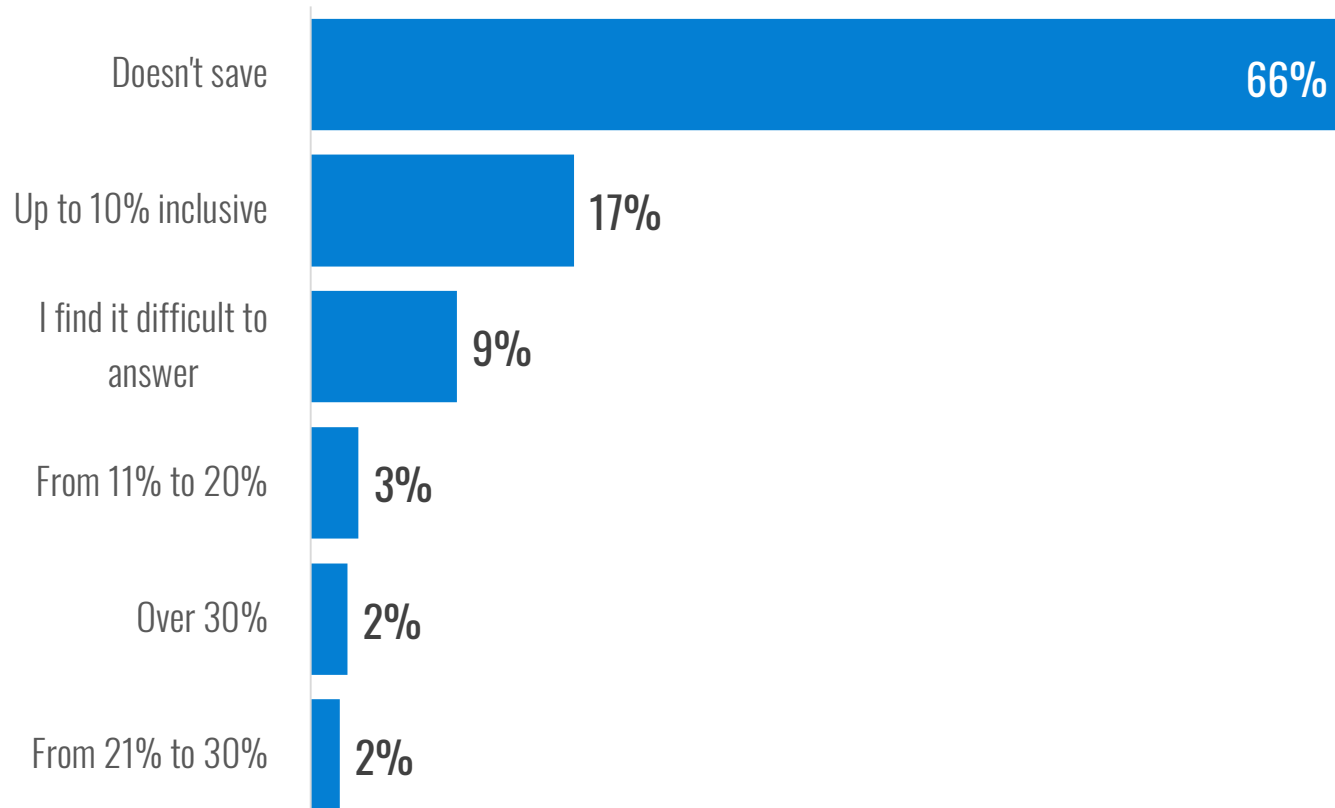
workers would prefer to turn to law enforcement agencies, with a 4% difference compared to all other subsidiaries and affiliates

Paramilitary Railway Security

Workers prefer to do nothing (9%)

* Answers to this question aren't taken into account in the calculation of SRS indicators
% (multiple possible answers)

Average share of monthly income saved



66% do not save money from their monthly income.

Portrait of a worker who does not save money:

- Male manual workers
- Aged 36-45 years
- With 11-20 years of work experience
- Earning an average monthly income of 151,000–250,000 tenge
- Allocating more than 75% of their income to financial obligations (e.g., mortgage, loan payments)
- Having 2-3 dependent children

44% of employees at KTZ Express set aside a portion of their income for savings

Kazakhstan Temir Zholy (KTZ) continues to strive for excellence in personnel management and enhancing employee engagement. Based on research and analysis of the current situation, the company has identified **six key areas for improvement**: employee engagement, youth engagement, leadership involvement, employee well-being, social tranquility, and job satisfaction. Each of these areas requires a targeted approach and the implementation of comprehensive measures.

- To improve the overall situation in underperforming divisions (**Freight Transportation, Passenger Transportation, Quryq Porty, Temirzholsu, and Path Diagnostics Center**), a series of strategic steps must be taken. These actions should focus on enhancing working conditions, increasing employee satisfaction, and fostering positive relationships with staff. Analysis of the current data has highlighted several key areas for improvement, including workplace conditions, satisfaction with the social benefits package, wage satisfaction, and attitudes towards protests.
- Industrial and household conditions play a critical role in shaping employee productivity and their overall perception of the workplace. Employee satisfaction with these conditions ranges from **48% to 72%**, signaling significant issues in several companies. Notably, the low rating at **Path Diagnostics Center (48%)** requires immediate attention. **Management should conduct a comprehensive audit of all industrial and household facilities, including restrooms, break rooms, and kitchen areas, as well as evaluate the quality of ventilation and lighting.** This audit will help identify problem areas and address deficiencies that impact employee comfort and health. Moreover, attention must be given to updating the equipment and tools used in the workplace. Outdated and inefficient equipment can hinder productivity and increase physical strain on employees. To improve the working environment, innovative technologies and mechanisms should be introduced to reduce fatigue and expedite task completion. In addition, the creation of more comfortable and convenient rest areas is essential. This could involve equipping additional break rooms and installing air conditioning in areas where high temperatures may affect performance.

- Satisfaction with the social benefits package is also an important component affecting the overall morale in the company. Based on the provided data, **satisfaction with the social benefits package ranges from 54% to 85%**. A particularly **low** satisfaction rate is recorded at the **Quryq Porty** company, where only **54%** of employees are satisfied with the social benefits. This indicates the need to review and improve the existing package. Management should conduct a survey among employees to understand which benefits and conditions are considered most important. It is important to offer a wide range of services, such as health insurance, transportation cost reimbursements, support for education and professional development, as well as additional time off or flexible work schedules to increase satisfaction. Improving the social benefits package is expected to enhance employee loyalty and reduce turnover. Furthermore, companies should organize regular consultations with staff to identify new needs and adjust the benefits package in line with changing external conditions and employee demands.
- Wages and their alignment with the work performed represent another critical area requiring focused attention. Survey data reveals **low levels** of satisfaction with compensation, particularly in companies such as **Freight Transportation, Passenger Transportation, and Quryq Porty, where only 44% and 38% of employees, respectively, are satisfied with their pay**. These figures suggest that many employees perceive a disconnect between the complexity and volume of their work and the remuneration they receive. To address this, management should conduct a thorough review of the company's compensation policy to ensure wage levels are aligned with both internal job demands and external market standards. A benchmarking analysis comparing current salaries with industry averages and competitor offerings will help identify discrepancies. If pay levels are found to be below market rates, revisions should be made, including the introduction of a transparent performance-based bonus system. This system should be linked to individual productivity, team results, and compliance with safety protocols. Such a structure will not only enhance motivation but also promote fairness and transparency, ultimately supporting the retention of skilled and experienced employees.

- Attitudes toward protesters and the presence of dissenting sentiments among employees represent a critical area of concern that warrants close attention. In some companies, **support for protesters reaches as high as 63%**, highlighting potential communication gaps between management and staff. Such sentiments may stem from a perceived lack of responsiveness to employee concerns and limited avenues for voicing dissatisfaction. To address this, it is essential to foster a culture of open dialogue and mutual respect. Management should establish and promote transparent communication policies that empower employees to express their views and provide feedback without fear of negative consequences. Regular town halls, feedback sessions, and open forums can serve as effective platforms for discussing workplace challenges, social issues, and proposed changes. In parallel, leadership development is key. Managers and supervisors should be trained in conflict resolution, active listening, and inclusive decision-making to ensure disputes are addressed constructively and relationships within the team remain positive. Building trust and demonstrating genuine responsiveness to employee concerns will be crucial in preventing the escalation of protest sentiments and enhancing social cohesion within the workforce.
- Overall, enhancing industrial and household conditions, strengthening social policies, ensuring fair and competitive compensation, and fostering a respectful attitude toward employee concerns—including protest sentiments—will have a meaningful impact on workforce morale. These improvements are expected to boost job satisfaction, lower stress levels, and reduce the risk of internal conflict, ultimately contributing to a more stable and productive work environment. In the long term, such efforts will strengthen organizational performance, increase employee retention and loyalty, and reinforce the company’s reputation in the market.

The third focus area is leadership engagement. On average, **leadership engagement stands at 72%**, which exceeds the overall company average. However, relatively low levels of engagement are observed in specific departments such as **Kaztemirtrans, Passenger Transportation, and Temirzholsu**. The primary factors contributing to dissatisfaction among leaders include concerns over compensation, working conditions, opportunities for training and professional growth, and the adequacy of the social benefits package.

Practical tools:

- Conducting leadership training for line managers: developing managerial skills and competencies.
- Implementing competency development and career growth programs: creating individual career plans and providing training opportunities.
- Improving working conditions and increasing salaries for managers: revising compensation packages based on market data.
- Introducing a feedback system between managers and senior management: conducting regular surveys and meetings to discuss current issues and suggestions.
- Organizing events to strengthen team spirit among managers: team-building activities, conferences, and roundtables for experience exchange.

THANK YOU FOR YOUR ATTENTION!