



ҚАЗАҚСТАН
ТЕМІР
ЖОЛЫ

SRS 2025

SAMRUK RESEARCH SERVICES

NC Kazakhstan temir zholy JSC

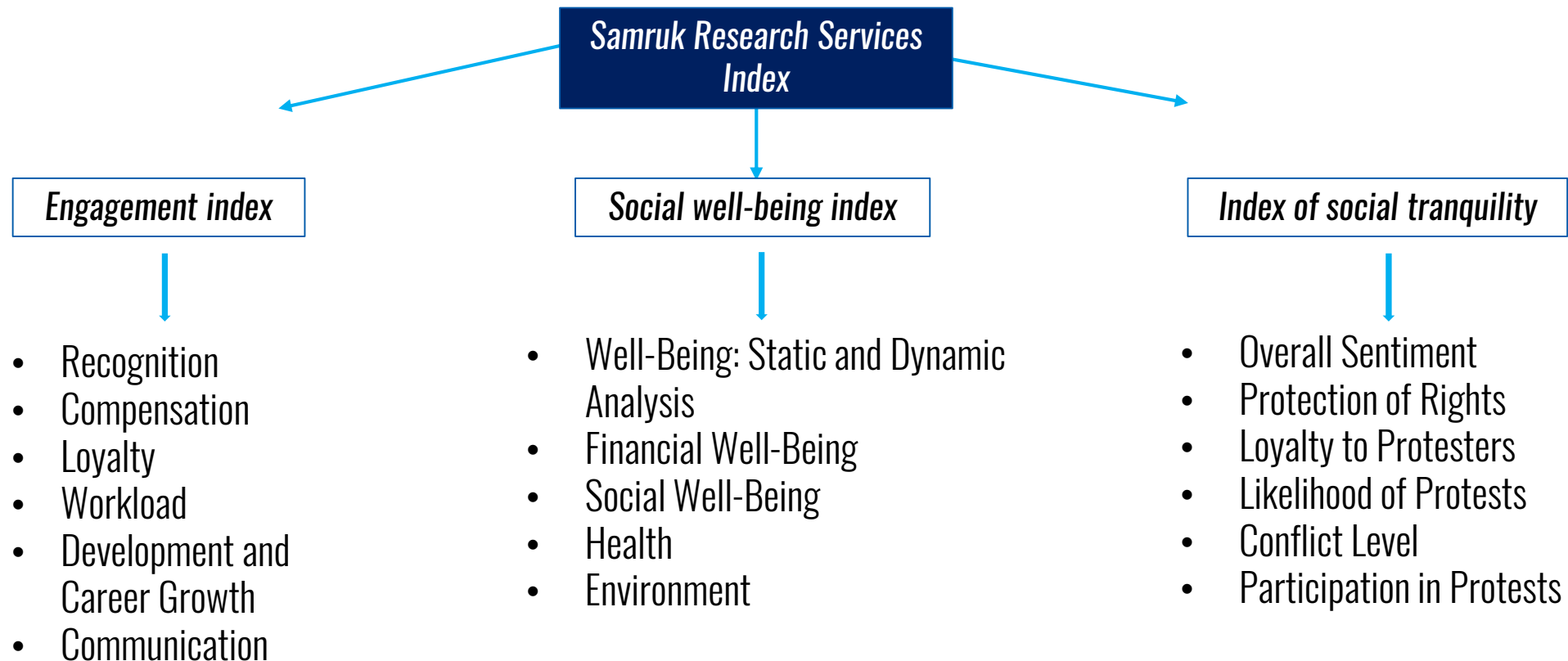




PURPOSE

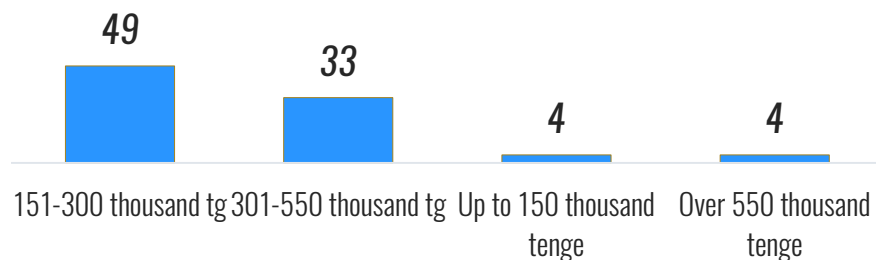
Analysis of the level of social stability in the workforce of JSC 'NC 'Kazakhstan Temir Zholy' based on the Samruk Research Services methodology for 2025.

The key objective of the SRS study is to diagnose and analyze the level of social stability by assessing indicators such as employee engagement, social well-being, and social stability.

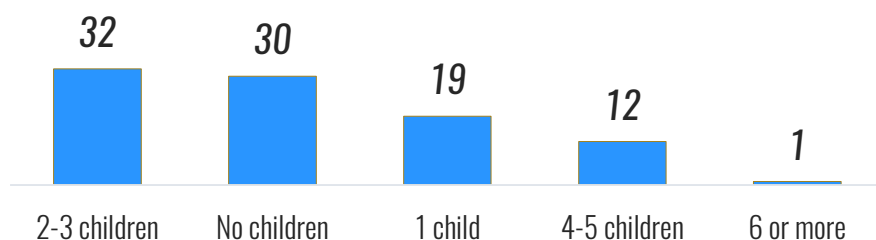


PROFILE OF RESPONDENTS

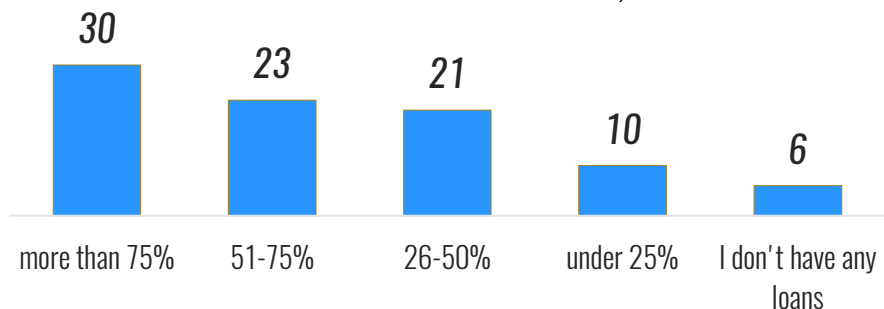
AVERAGE MONTHLY INCOME, %



NUMBER F CHILDREN UNDER 18, %



AMOUNT OF LOAN PAYMENTS, %



Gender structure



72%



28%

- A total of **15,562** production workers were surveyed.
- The survey was conducted from October 11 to November 20, 2025.
- CAWI (online survey)



Director

2%



Manual worker

53%



Line head

9%



Support staff

7%



Specialist

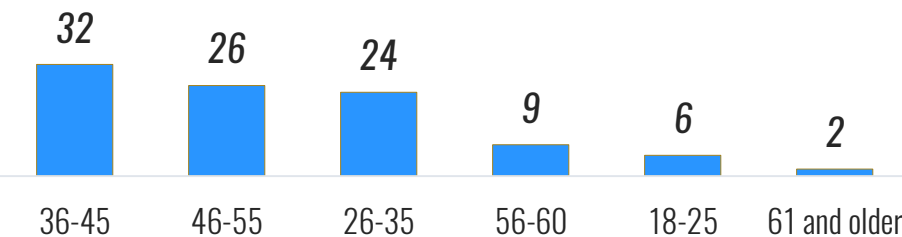
20%



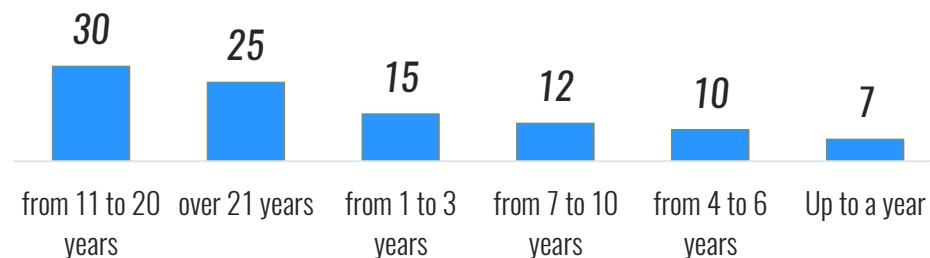
Other

9%

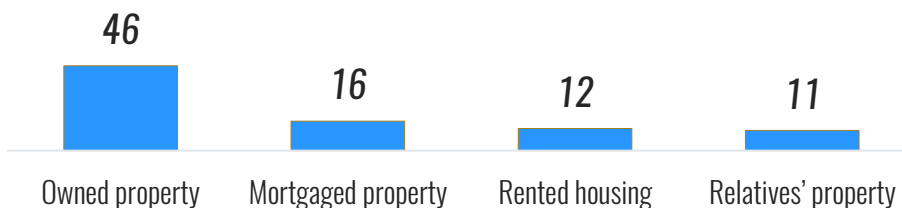
AGE, %



WORK EXPERIENCE, %

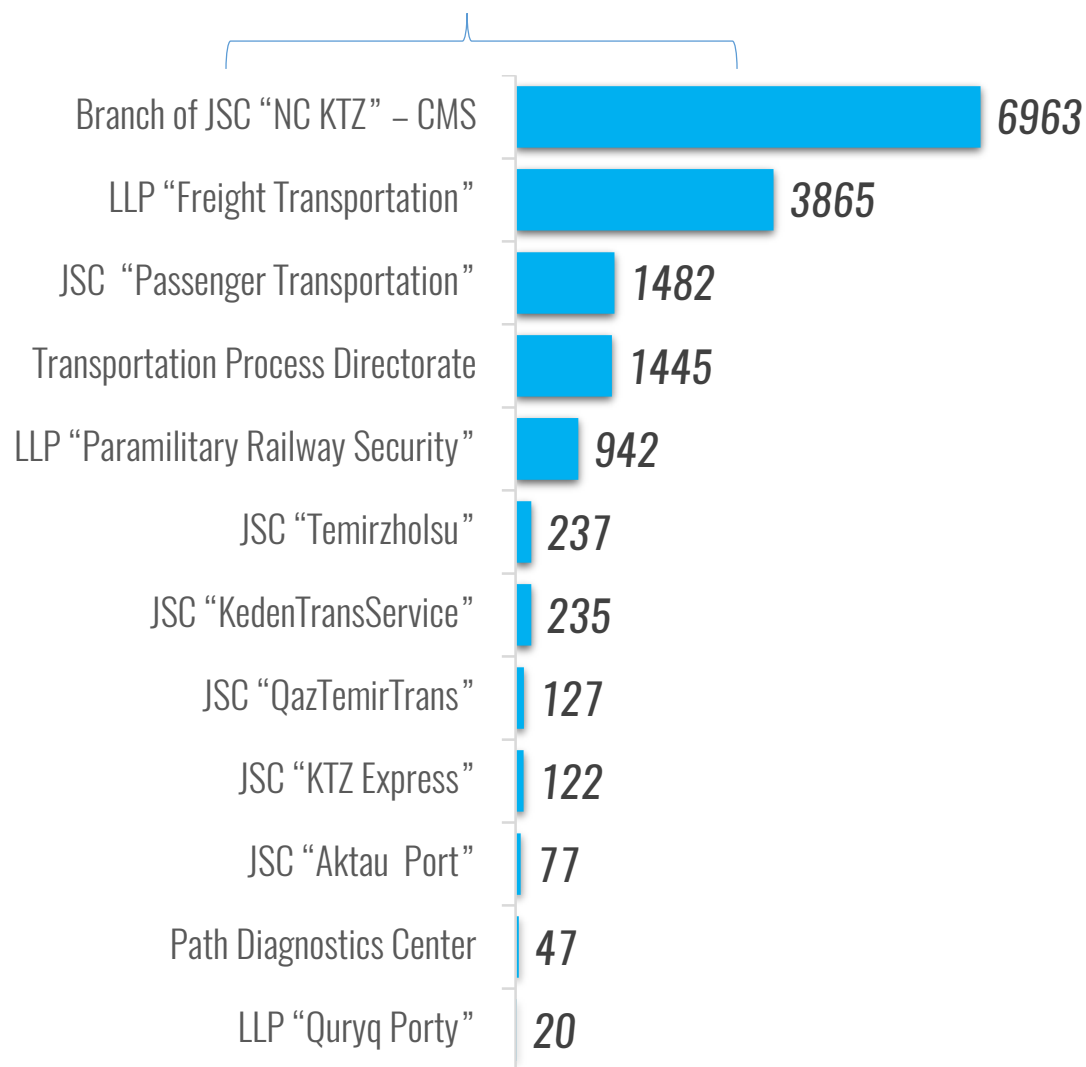


TYPE OF HOUSING, %



SAMPLE AND SCALE

Surveyed **15 562** production workers



Z-score** SRS scale	Баллы	Уровень соц.стабильно сти	Характеристика
2 or more	92 and above	High	The company has achieved high performance in each rating and is taking measures to further maintain and improve/strengthen it.
From 1 to 2	81-92	Above average	The company pays increased attention to social development issues. The index indicators are high.
From -1 to 1	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.
From -1 to -2	48-59	Below average	The company devotes insufficient time to personnel development and social policy, as well as issues of strengthening social stability.
-2 and below	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 2025,%	Δ to 2024 (n.n.)		Engagement Index, %	Social Well-being Index,%	Index of Social tranquility,%
Kazakhstan Temir Zholy	73	↑	+4	74	58	87
“KTZ Express”	89	↑	+3	91	80	92
“QazTemirTrans”	85	↑	+6	86	75	94
“Aktau Port”	79	↑	+1	81	62	91
Path Diagnostics Center	78	↑	+5	80	60	92
“Temirzholsu”	76	↑	+8	78	61	89
Transportation Process Directorate	75			76	61	88
“Paramilitary Railway Security”	75	↑	+9	76	57	90
Branch of JSC “NC KTZ” – CMS	74	↑	+4	76	58	87
“KedenTransService”	74	-	0	74	63	85
“Freight Transportation”	73	↑	+5	74	58	87
“Passenger Transportation”	66	↑	+2	66	48	83
“Quryq Porty”	60	↓	-12	62	42	74

IN 1 SUBSIDIARY

The most significant decline was observed in “Quryq Porty”, where the indicator decreased by 12 percentage points.

IN 9 SUBSIDIARIES/BRANCHES

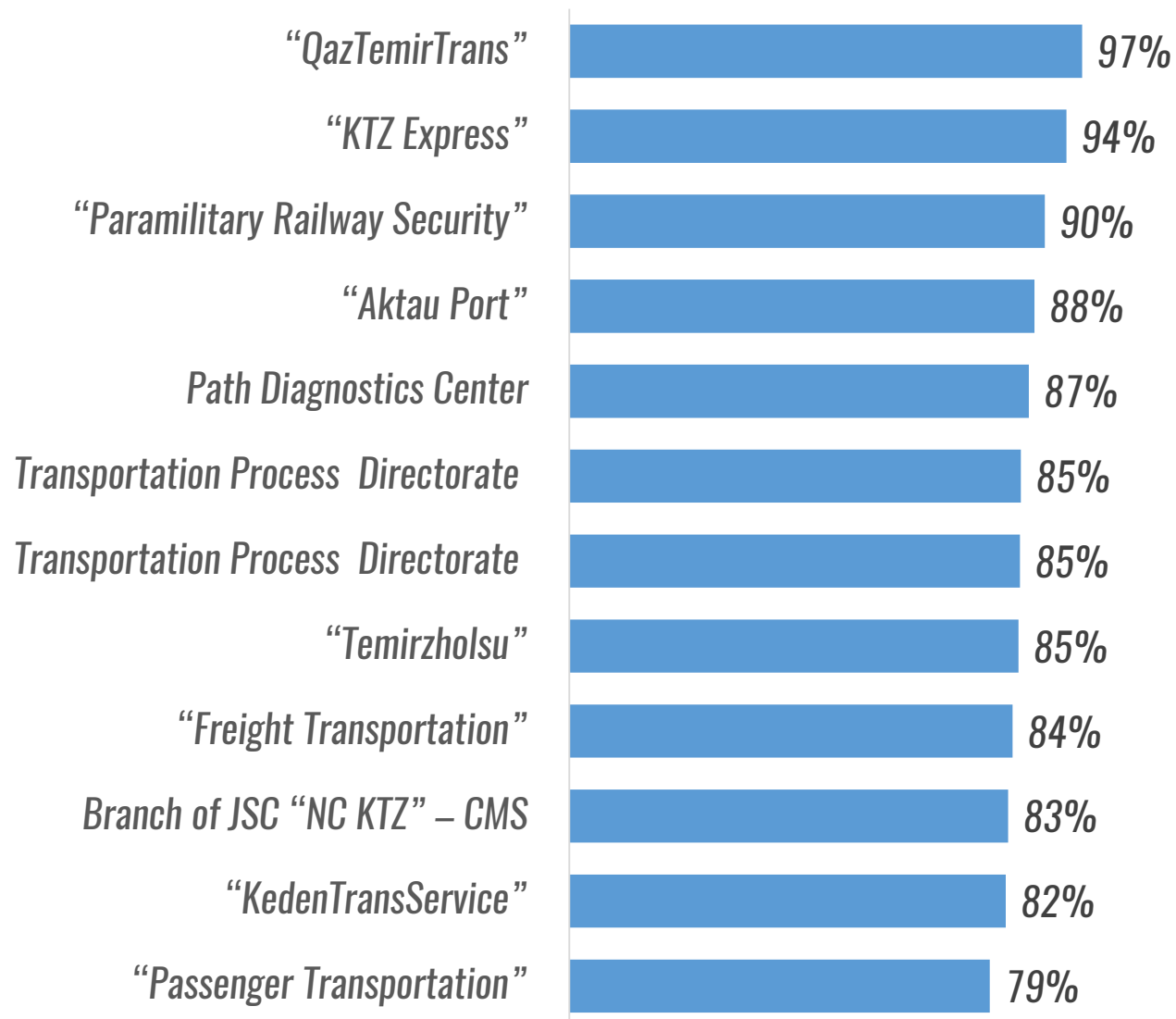
Positive dynamics ranged from +1 to +9 percentage points. The most significant growth occurred at “Paramilitary Railway Security” (+9 percentage points).

IN 1 SUBSIDIARY

At “KedenTransService” the indicator remained unchanged.

CORRUPTION INTOLERANCE INDEX

KEY INDICATORS:



The company's corruption intolerance index is:

84%

84%

Employees know where to report if they witness corruption

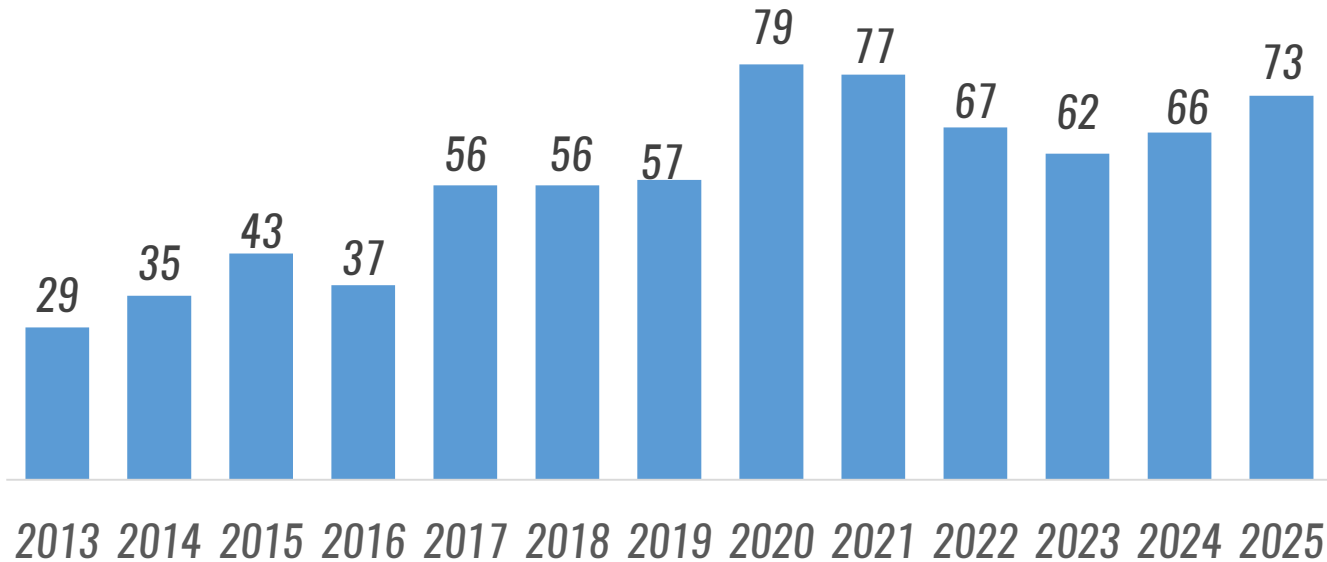
79%

Employees trust management on matters of corruption

3%

Have witnessed instances of corruption

ENGAGEMENT INDEX OVER TIME, %



▲ The engagement index overall demonstrates long-term growth — from 29% in 2013 to 73% in 2025, with a peak in 2020–2021, indicating increased employee engagement.

97%



AWARE OF THE RESULTS EXPECTED FROM THEM

95%



SATISFIED WITH PRODUCTION SAFETY

92%



WERE NOT EXPERIENCED MORAL AND PSYCHOLOGICAL PRESSURE FROM MANAGEMENT

ENGAGEMENT INDEX

KEY INDICATORS:



	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024			2025
Kazakhstan Temir Zholy	29	35	43	37	56	56	57	79	77	67	62	66	↑	+8	74
“KTZ Express”	-	-	-	-	-	-	50	82	92	88	70	87	↑	+4	91
“QazTemirTrans”	41	35	42	43			55	86	85	82	76	77	↑	+9	86
“Aktau Port”	-	-	-	-	-	-	-	-	-	88	86	76	↑	+5	81
Path Diagnostics Center	-	-	65	37	60	41	55	88	81	82	70	70	↑	+10	80
“Temirzholsu”	-	-	-	-	-	-	-	-	-	79	64	65	↑	+13	78
Branch of JSC “NC KTZ” – CMS	30	38	43	42	59	53	62	84	81	68	62	69	↑	+7	76
“Paramilitary Railway Security”	-	-	-	-	-	-	-	-	-	78	60	63	↑	+13	76
Path Diagnostics Center	-	-	-	-	-	-	-	-	-	-	-	-	-	-	76
“Freight Transportation”	25	32	42	36	57	65	62	76	74	62	62	64	↑	+10	74
“KedenTransService”	-	-	-	-	-	-	-	-	89	82	62	69	↑	+5	74
“Passenger Transportation”	20	20	39	28	45	35	18	76	71	60	56	59	↑	+7	66
“Quryq Porty”	-	-	-	-	-	-	-	-	-	-	71	74	↓	-12	62



The best indicator is “KTZ Express” – 91%.



Lowest indicator: “Quryq Porty” with an indicator of 62%.

In 7 subsidiaries/branches

The engagement index is below the company average:
Branch of JSC “NC KTZ” – CMS (Mainline Network Directorate) (76%), etc.

In 5 subsidiaries/branches

Engagement index indicators are above the company average: “Temirzholsu” (78%), etc.

The largest increase in indicators was recorded at “Temirzholsu” and “Paramilitary Railway Security”, amounting to +13 percentage points.

ENGAGEMENT FACTORS

KEY INDICATORS:



28%

The Path Diagnostics Center is dissatisfied with the workplace conditions.

26%

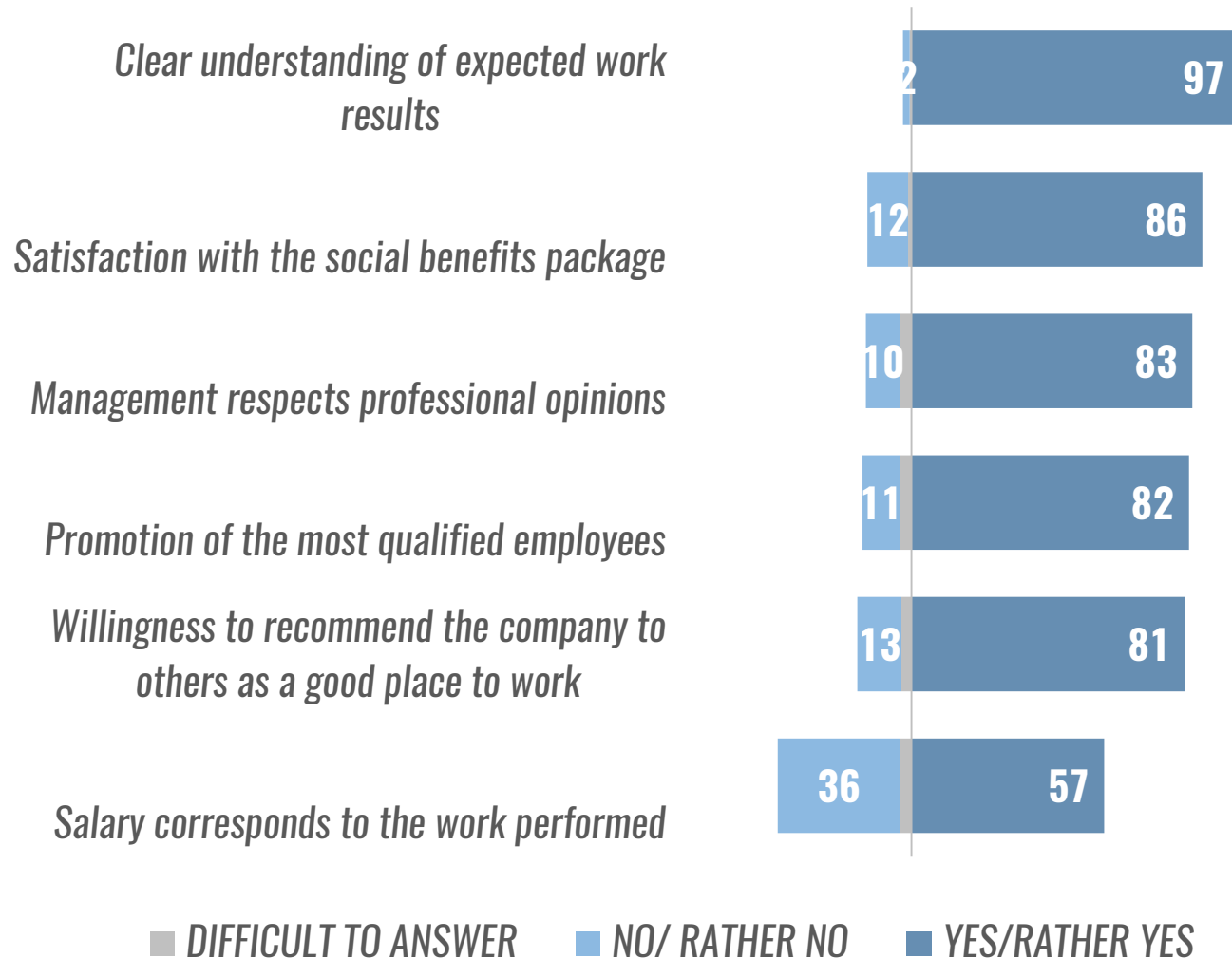
Employees of “KedenTransService” lack opportunities for learning and career growth.

15%

Employees at “Quryq Porty” lack materials and equipment.

ENGAGEMENT FACTORS

KEY INDICATORS:



47%

Employees of “Paramilitary Railway Security” believe that their salary does not correspond to the work performed

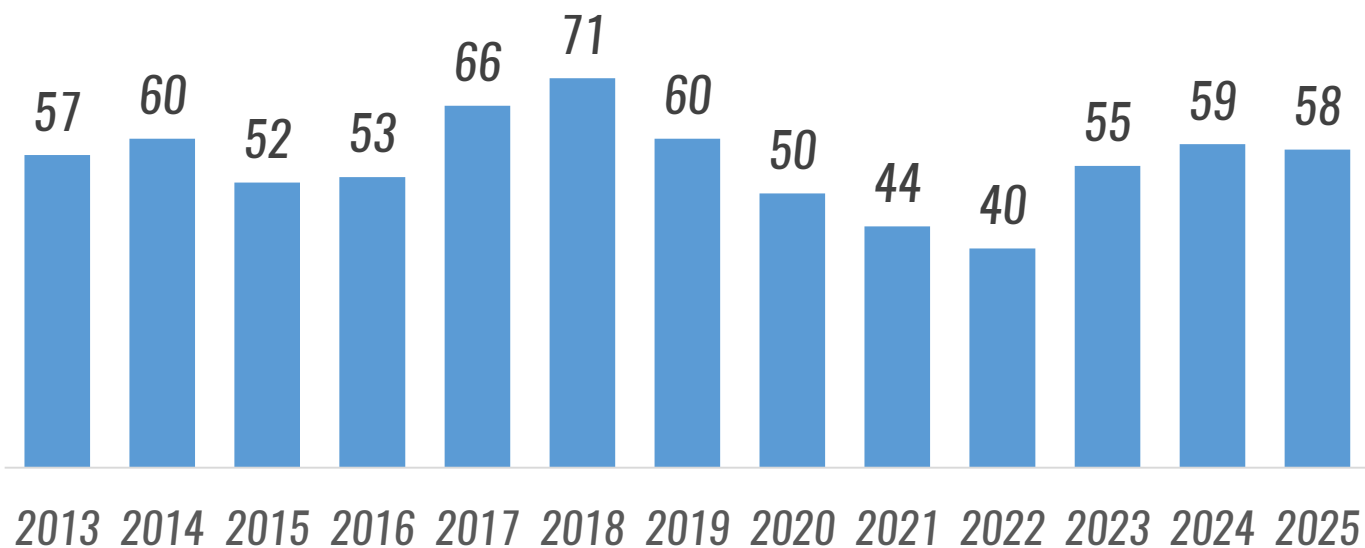
25%

Employees of “Quryq Porty” are not willing to recommend the company to friends and acquaintances

20%

Employees of “Quryq Porty” consider promotions to be unfair

SOCIAL WELL-BEING INDEX OVER TIME, %



▼ The trend remains unstable: after rising to a peak in 2018 (71%), it was followed by a prolonged decline, and the current values have not yet returned to the pre-crisis level.

86%

SATISFIED WITH THE QUALITY OF PREVENTIVE
MEDICAL CHECK-UPS

79%

EMPLOYEES ARE SATISFIED WITH THEIR
QUALITY OF LIFE

77%

SATISFIED WITH WORK-LIFE BALANCE

SOCIAL WELL-BEING INDEX

KEY INDICATORS:



	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024			2025
Kazakhstan Temir Zholy	57	60	52	53	66	71	60	50	44	40	55	59	↓	-1	58
“KTZ Express”	-	-	-	-	-	-	67	60	65	69	65	79	↑	1	80
“QazTemirTrans”	50	57	60	57	-	-	59	48	53	48	63	72	↑	3	75
“KedenTransService”	-	-	-	-	-	-	-	-	59	46	60	68	↓	-5	63
“Aktau Port”	-	-	-	-	-	-	-	-	-	81	78	68	↓	-6	62
“Temirzholsu”	-	-	-	-	-	-	-	-	-	50	64	62	↓	-1	61
Transportation Process Directorate	-	-	-	-	-	-	-	-	-	-	-	-	-	-	61
Path Diagnostics Center	-	-	64	51	72	74	72	60	46	55	68	63	↓	-3	60
“Freight Transportation”	57	58	51	52	68	77	64	46	42	37	56	58		0	58
Branch of JSC “NC KTZ” – CMS	57	61	51	57	66	68	62	56	47	38	52	60	↓	-2	58
“Paramilitary Railway Security”	-	-	-	-	-	-	-	-	-	43	57	56	↑	1	57
“Passenger Transportation”	54	56	48	51	63	56	44	41	36	39	56	59	↓	-11	48
“Quryq Porty”	-	-	-	-	-	-	-	-	-		66	59	↓	-17	42

▲ The best indicator is “KTZ Express” - 80%.

▼ Lowest indicator is “Quryq Porty” - 42%.

6 subsidiaries/branches

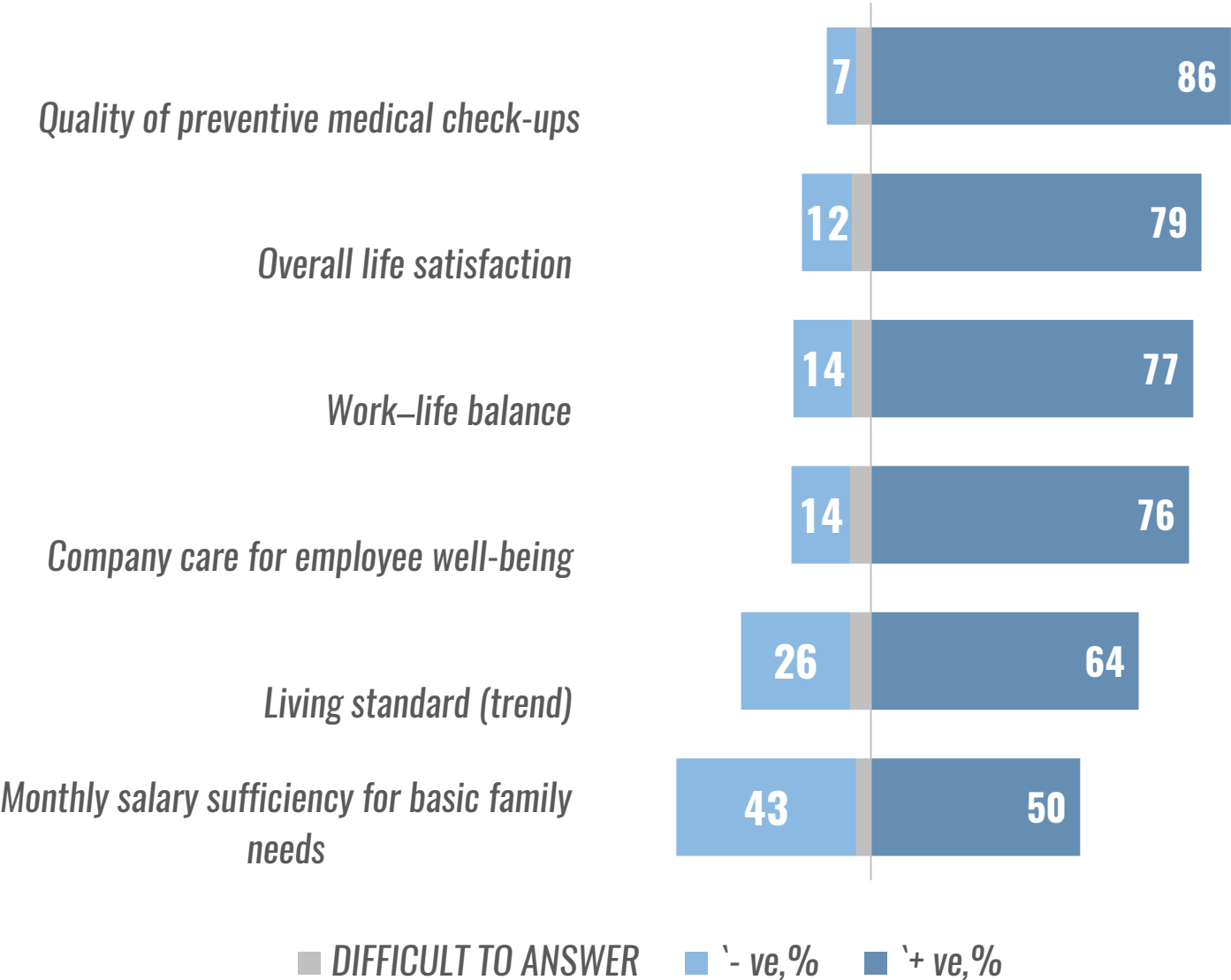
Social Well-being index is below the company average:

Path Diagnostics Center
“Freight Transportation”
Branch of JSC “NC KTZ” – CMS etc.

6 subsidiaries/branches

Social Well-being index is above below the company average:

“KTZ Express”
“QazTemirTrans”
“KedenTransService” etc.



61%

EMPLOYEES OF “PARAMILITARY RAILWAY SECURITY” REPORT THAT THEIR SALARY DOES NOT COVER EXPENSES

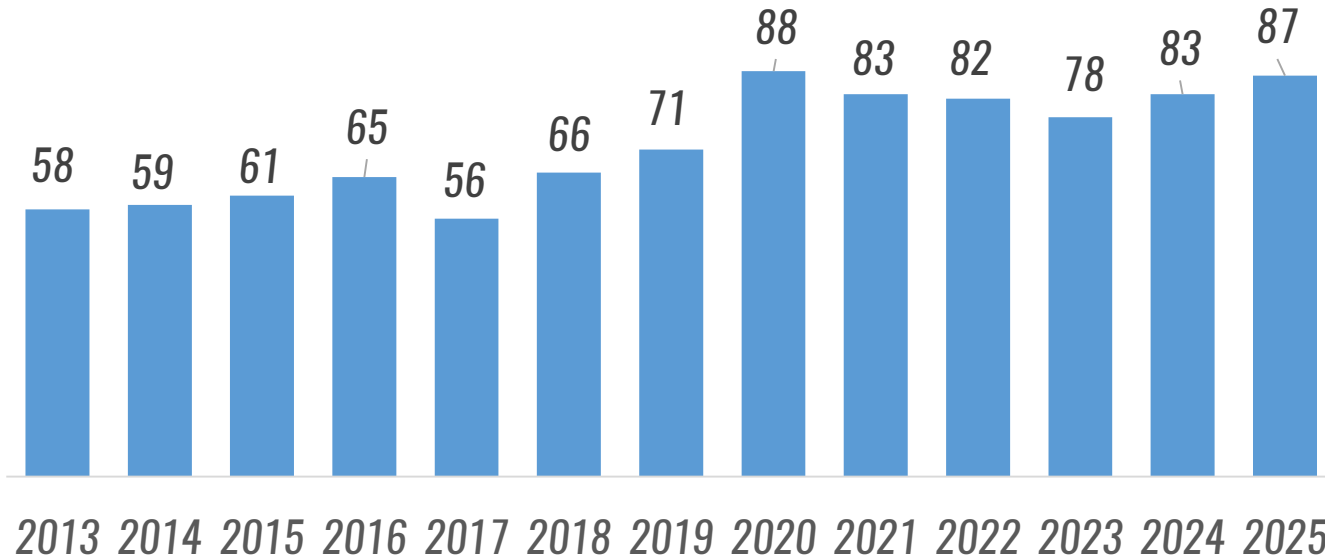
39%

EMPLOYEES OF “AKTAU PORT” DISAGREE THAT THEIR STANDARD OF LIVING HAS IMPROVED SINCE THE BEGINNING OF THE YEAR

12%

AT “QURYQ PORTY”, EMPLOYEES BELIEVE THAT THE COMPANY DOES NOT CARE ABOUT THEIR WELL-BEING

INDEX OF SOCIAL TRANQUILITY OVER TIME, %



The Index of social tranquility shows strong long-term growth — from 58% in 2013 to 87% in 2025, remaining high after peaking in 2020

96%

HAVE NO EXPERIENCE PARTICIPATING IN PROTEST ACTIONS

91%

REPORT A FRIENDLY AND CALM WORK ATMOSPHERE

82%

EMPLOYEES BELIEVE THAT LABOR RIGHTS ARE ADEQUATELY PROTECTED

INDEX OF SOCIAL TRANQUILITY

KEY INDICATORS:



	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024			2025
Kazakhstan Temir Zholy	58	59	61	65	56	66	71	88	83	82	78	83	↑	+4	87
“QazTemirTrans”	56	59	63	63	-	-	75	87	85	91	88	88	↑	+6	94
“KTZ Express”	-	-	-	-	-	-	68	88	88	86	86	91	↑	+1	92
Path Diagnostics Center	-	-	68	59	62	56	69	89	85	93	83	87	↑	+5	92
“Aktau Port”	-	-	-	-	-	-	-	-	-	88	91	92	↓	-1	91
“Paramilitary Railway Security”	-	-	-	-	-	-	-	94	96	85	80	84	↑	+6	90
“Temirzholsu”	-	-	-	-	-	-	-	-	-	88	80	82	↑	+7	89
“Freight Transportation”	58	61	63	63	59	72	72	84	79	80	77	83	↑	+4	87
Branch of JSC “NC KTZ” – CMS	58	59	62	67	55	63	73	92	88	85	77	84	↑	+3	87
“KedenTransService”	-	-	-	-	-	-	-	-	92	86	83	88	↓	-3	85
“Passenger Transportation”	58	55	60	66	50	53	56	85	76	68	73	80	↑	+3	83
Transportation Process Directorate	-	-	-	-	-	-	-	-	-	-	-	-	-	-	75
“Quryq Porty”	-	-	-	-	-	-	-	-	-	-	81	80	↓	-6	74



The best indicator is “QazTemirTrans” (94%).



Lowest indicator is “Quryq Porty” (74%).

In 6 subsidiaries/branches

Index of social tranquility is above the company average:
“QazTemirTrans”
“KTZ Express”
Path Diagnostics Center etc.

In 6 subsidiaries/branches

Index of social tranquility index is below the company average:
“Passenger Transportation”
Transportation Process Directorate
“Quryq Porty” etc.



17%

EMPLOYEES OF “KEDENTRANSSERVICE” HAVE A POSITIVE ATTITUDE TOWARD COLLEAGUES DEFENDING THEIR INTERESTS THROUGH STRIKES

15%

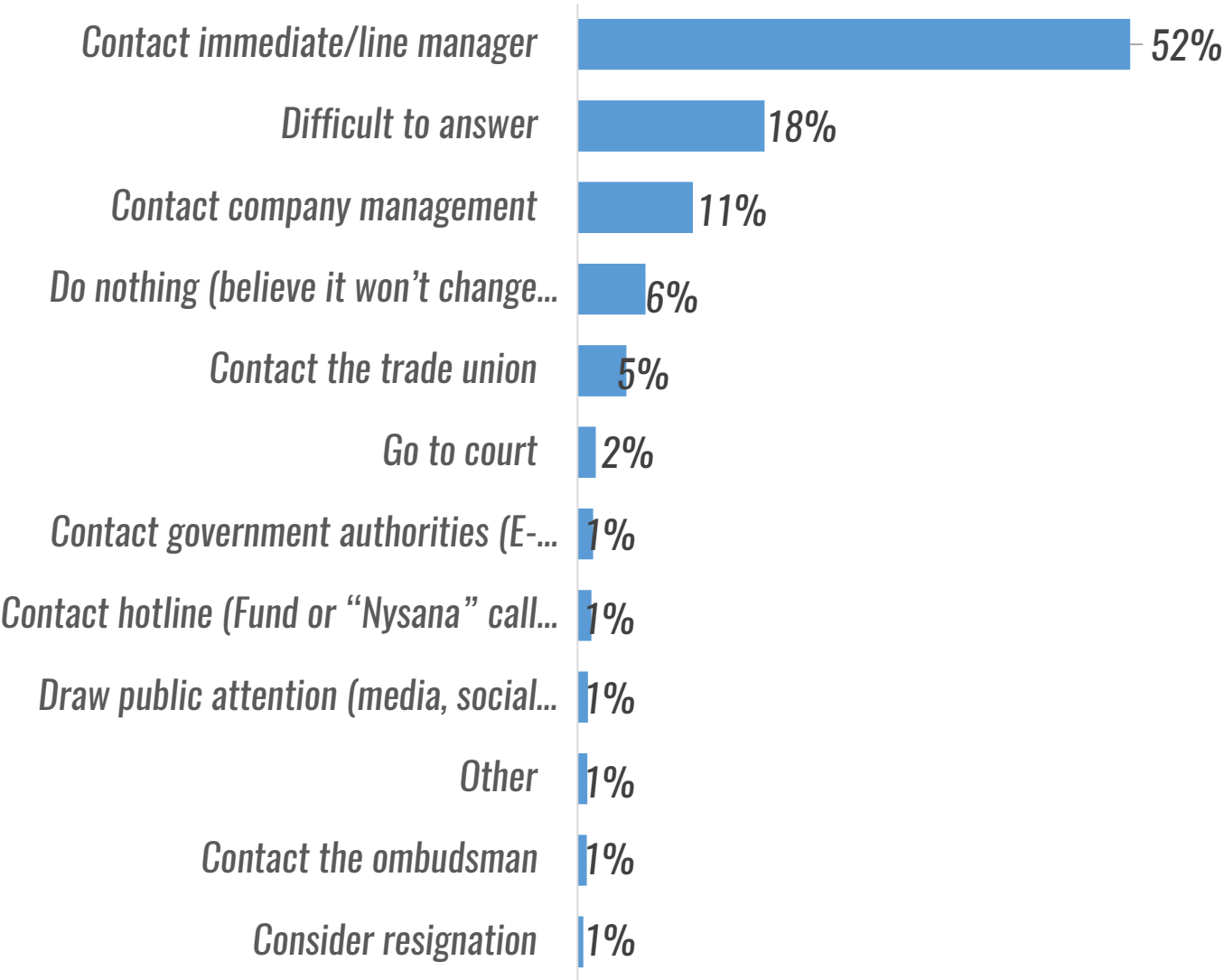
EMPLOYEES OF “QURYQ PORTY” BELIEVE THEIR LABOR RIGHTS ARE NOT PROTECTED

10%

EMPLOYEES OF “QURYQ PORTY” REPORT ABOUT LIKELIHOOD OF EMPLOYEE DISSATISFACTION ACTIONS IN THE COMPANY

MODEL OF ACTION IN CASE OF LABOR RIGHTS VIOLATIONS

KEY INDICATORS:



IN 62% OF CASES

EMPLOYEES OF "KTZ EXPRESS" PREFER TO CONTACT THEIR IMMEDIATE SUPERVISOR

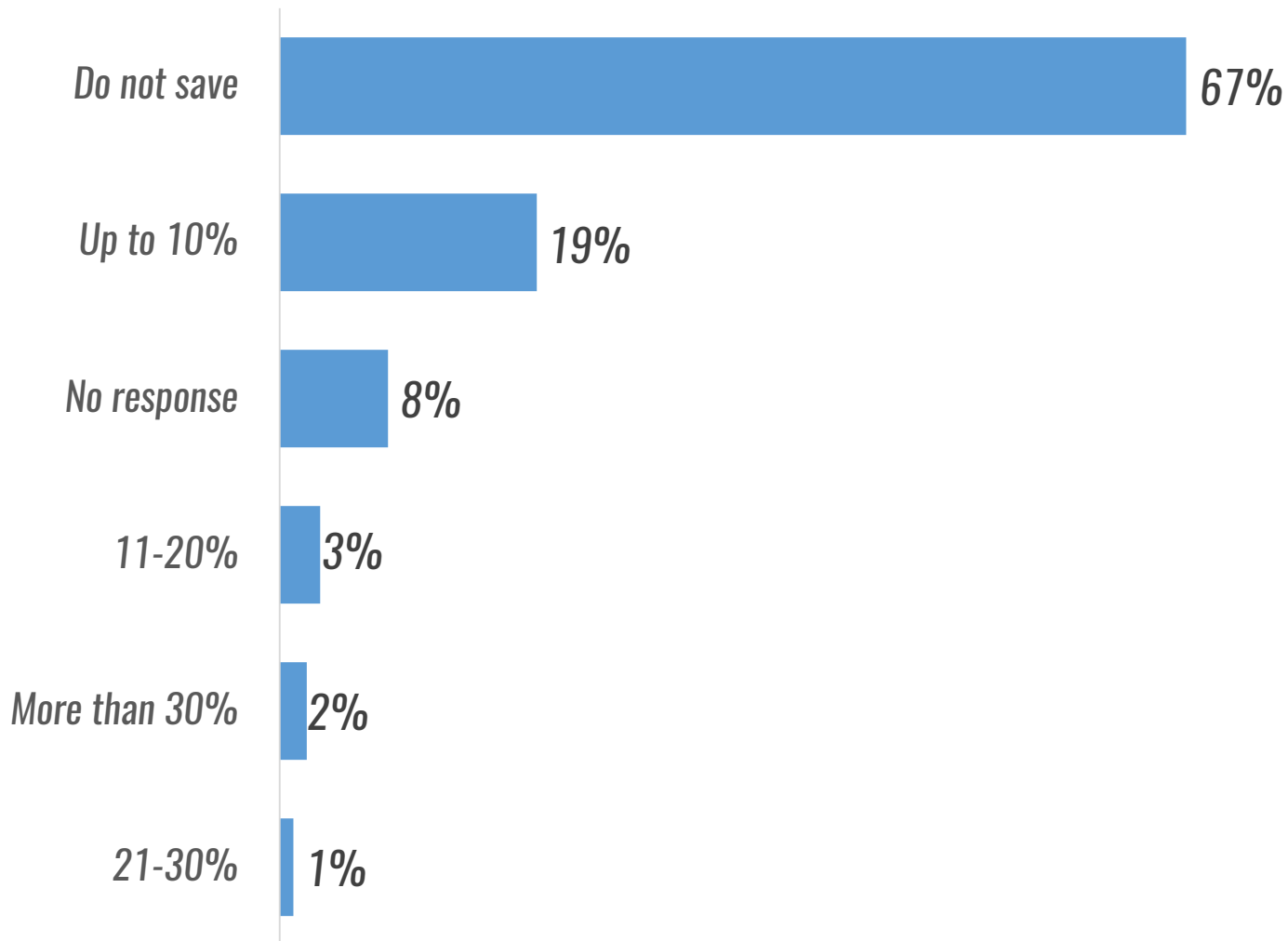
IN 28% OF CASES

EMPLOYEES OF THE TRACK DIAGNOSTICS CENTER PREFER TO CONTACT COMPANY MANAGEMENT

IN 28% OF CASES

EMPLOYEES OF AKTAU PORT" PREFER TO DO NOTHING

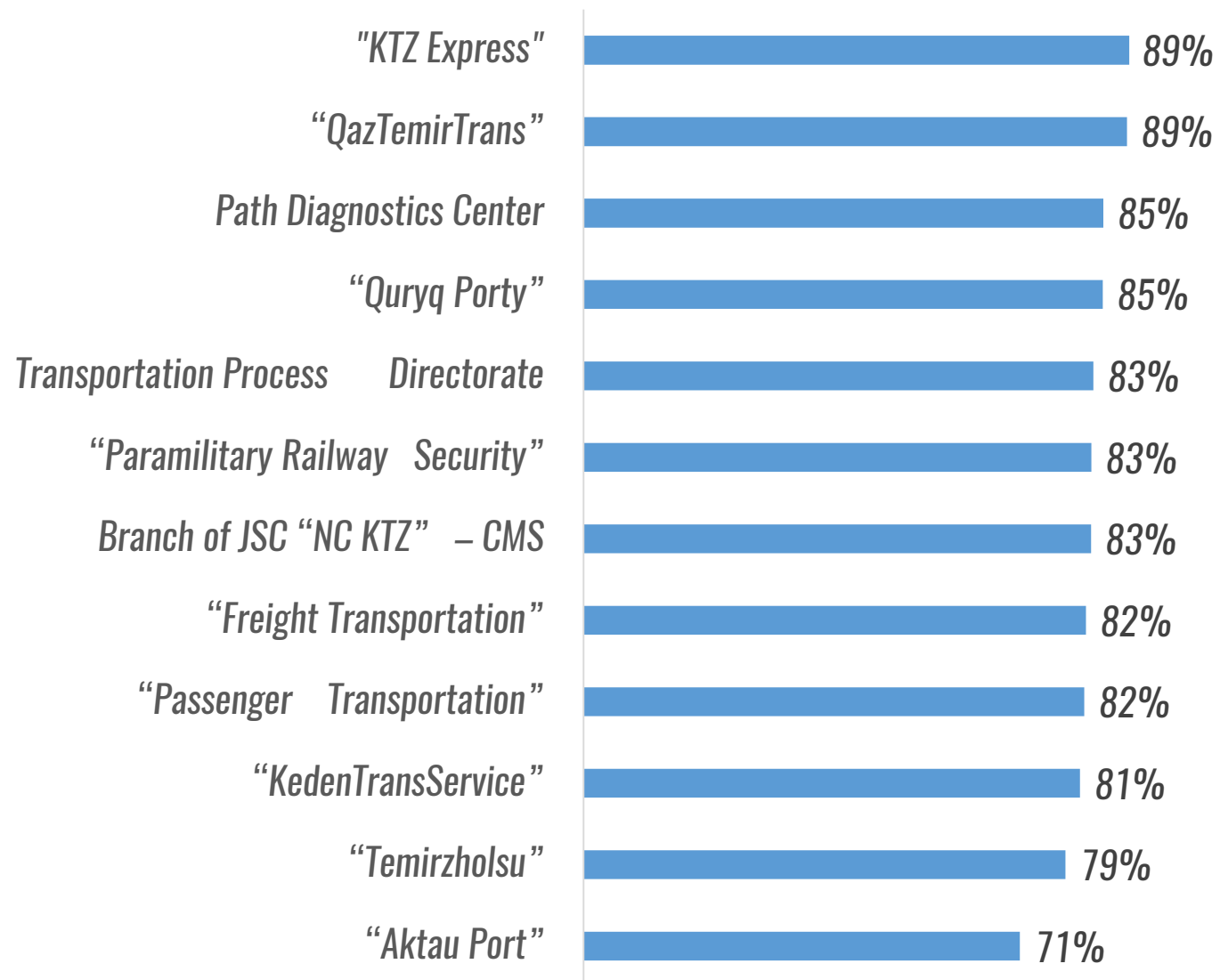
Average Share of Monthly Income Saved



25%

EMPLOYEES OF JSC “NC KAZAKHSTAN TEMIR ZHOLY” SAVE SOME PORTION OF THEIR INCOME

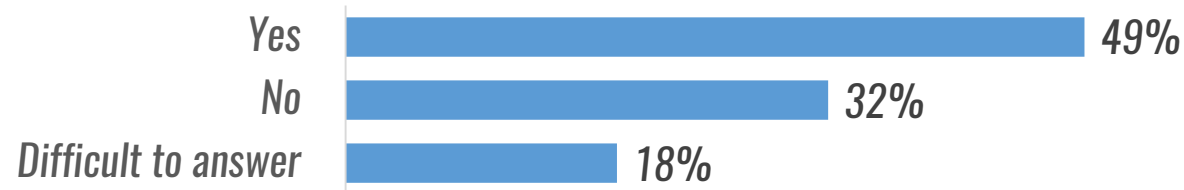
Employees who save most frequently:
Directors (65%)



In all 12
subsidiaries/branches

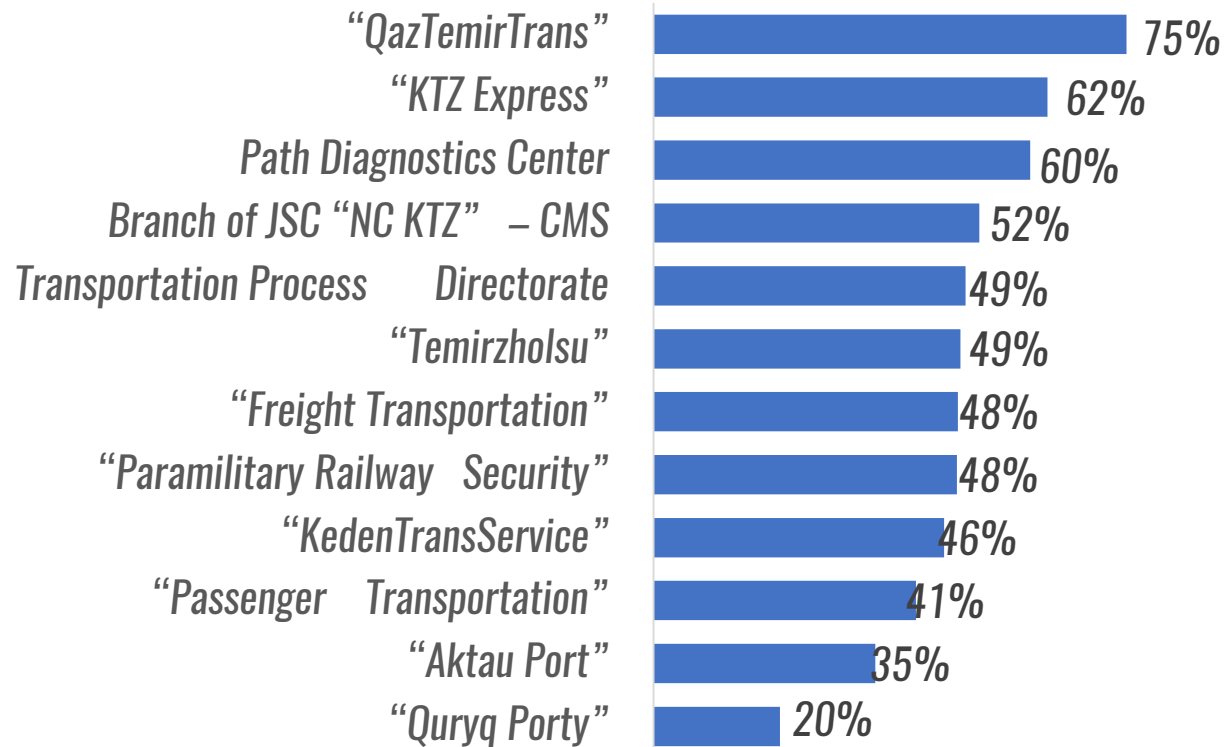
HIGH LEVEL OF INDEBTEDNESS

Does the employee aware that the company has an Ombudsman?



49% AWARE OF THE OMBUDSMAN INSTITUTION

Highest awareness among employees at “QazTemirTrans”



Among those aware of the Ombudsman, almost all believe that its presence **makes the employer pay more attention to labor rights**

1. UTILITY ROOMS

Short-term measures (up to 3 months):

- Conduct an audit of the technical condition of welfare facilities at each branch
- Identify priority areas for repair: restrooms, showers, and dining areas
- Organize timely cleaning and daily monitoring of sanitary conditions
- Equip facilities with basic amenities: water coolers, microwave ovens, refrigerators, and furniture
- Ensure proper functioning of heating and ventilation systems; promptly carry out minor repairs

Medium-term measures (3–12 months):

- Carry out major renovations of buildings and welfare facilities in accordance with established priorities
- Install energy-efficient lighting and ventilation systems
- Equip rest and hygiene rooms for employees working shift-based and 24-hour schedules
- Establish a unified standard for sanitary and welfare conditions across all company branches.

2. MATERIALS AND EQUIPMENT

Short-term measures:

- Conduct an inventory of equipment, machinery, tools, office equipment, and communication devices
- Speed up procurement processes, especially for critical items (office supplies, cartridges, spare parts)
- Ensure equitable distribution of equipment across departments
- Organize centralized procurement of basic consumables so employees do not have to purchase them at their own expense

Medium-term measures:

- Develop a program to modernize the technical fleet (cranes, vehicles, locomotives)
- Upgrade computer equipment and introduce modern digital tools
- Implement electronic document management and automate part of work processes
- Improve the quality of lighting, surveillance cameras, and communication systems to enhance safety

3. HR ISSUES

Short-term measures:

- Assess staffing levels across branches and identify positions with personnel shortages
- Organize regular HR meetings with teams to provide explanations on the social benefits package, perks, and career opportunities
- Launch a training program for managers focused on communication skills and managerial culture

Medium-term measures:

- Establish a transparent system for career progression and managerial appointments
- Implement a competency assessment system to ensure fair distribution of responsibilities
- Develop flexible work schedules for office employees (remote work, hybrid formats)
- Expand the training system: in-person courses, internships, trainings, and experience exchange between branches

4. FAIRNESS AND OCCUPATIONAL SAFETY

Short-term measures:

- Strengthen control over compliance with labor legislation: overtime, work schedules, and working hours
- Verify the accuracy of salary, allowance, and compensation calculations
- Conduct additional safety briefings and short toolbox talks
- Enhance control over the quality and proper issuance of personal protective equipment (PPE)

Medium-term measures:

- Establish a hotline for anonymous reporting of violations and unfair practices
- Conduct independent audits of working conditions at branch level
- Develop a zero-tolerance program toward abusive behavior, nepotism, and corruption
- Equip high-risk units with modern occupational safety equipment and safety monitoring systems

5. COMPENSATION, SOCIAL BENEFITS, AND WORKWEAR

Short-term measures:

- Review base salaries taking into account inflation and labor market conditions
- Introduce transparent bonus criteria and inform employees in advance
- Ensure timely issuance of workwear and footwear with correct size fitting
- Improve the quality of workwear: winter, mid-season, and summer

Medium-term measures:

- Consider introducing additional allowances: for length of service, expanded duties, overtime, night shifts, and hazardous working conditions
- Improve health insurance coverage: higher limits and better quality of services
- Develop a social benefits program: spa and wellness treatment, sports memberships, transportation compensation, meals, and children's camps

6. GENERAL RECOMMENDATIONS

- Conduct in-depth studies at the Express Branch of Passenger Transportation, where low employee engagement has been identified, as well as at “Quryq Porty”
- As employees’ financial well-being is a concern, launch a large-scale program to improve employees’ financial literacy
- Carry out targeted work with groups showing low engagement (ages 36–45 and blue-collar workers): launch dedicated development programs for mid-career employees, including retraining, internal competitions, and career growth programs

7. SUPPORT FOR HIGHLY ENGAGED EMPLOYEES (YOUTH AGED 18–25 AND DIRECTORS)

- Develop youth-focused programs: mentoring, talent pools, and fast-track career paths
- Leverage managers as carriers of positive engagement by involving them in internal communications, experience sharing, and support for change initiatives