

ҚАЗАҚСТАН ТЕМІР ЖОЛЫ



Center for social  
cooperation  
and communications

# SAMRUK

## RESEARCH SERVICES

# 2025

FIRST HALF OF THE YEAR

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## JSC «NC «KAZAKHSTAN TEMIR ZHOLY»

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**Dear Colleagues,**

Engaged and high-performing employees are particularly vital in an era of limited resources and high expectations. Such employees are emotionally connected to their organization, genuinely invested in its success, and willing to go beyond their formal duties for the common good.

Workplace issues are not always voiced openly—they are discussed quietly: over lunch, in private messages, or on the way to work. For over 10 years, we have given a voice to 250,000 employees of the Samruk-Kazyna Group. They trust us because our work is guided by the values of «Senim» (Trust) and «Niet» (Intention).

As professional sociologists, we maintain neutrality and rely solely on figures and objective data. Our goal is to help companies become more successful and ensure employees' voices are heard.

In this report, based on survey data and business sociology insights, we explain how management can transform the work environment, corporate culture, and internal communications to motivate employees to contribute to achieving strategic goals.

We created this report to help you unlock the potential and loyalty of your employees. Whether you are a CEO, HR manager, or responsible for corporate culture, you will find data and ideas here to develop effective solutions that deliver real results.

Let's be honest: increasing engagement is a process that requires time and collective effort. Only through collaboration between management and employees can initiatives be created that spark enthusiasm, commitment, and motivation.

We are confident that this report will serve as a valuable tool in addressing issues impacting the well-being and effectiveness of your company's employees.

*Samruk Research Services Analytics Team*

## Contents

<b>Contents</b> .....	3
<b>Executive summary</b> .....	4
<b>Engagement</b> .....	6
<b>Manual worker Engagement</b> .....	10
<b>Manager Engagement</b> .....	12
<b>Engagement Drivers</b> .....	15
<b>Engagement Barriers</b> .....	16
<b>Employee Well-being</b> .....	19
<b>Industrial Relations</b> .....	28
<b>SRS Index</b> .....	36
<b>Employee Voice</b> .....	37
<b>Recommendations</b> .....	39
<b>Employee Characteristics</b> .....	42

## Executive summary

Understanding the significance and sensitivity of this matter, we urge that the survey results be used solely to improve work processes and make informed decisions. It is unacceptable to use this data to pressure employees or penalize them for their expressed opinions. We have prepared a detailed analysis to assist management in taking effective measures. We are convinced that the company's employees were as open as possible, expecting a fair and constructive response from the employer.

- The SRS Index for the first half of 2025 reached 72%, showing a 3 percentage point increase compared to the previous period.
- Employee engagement stood at 73%, a 7 percentage point increase from 2024. Men show a slightly higher engagement rate (73%) compared to women (71%).
- Analysis by age groups indicates that the highest engagement is among employees aged 18–25 (79%), likely due to their drive for professional growth, high adaptability, and openness to change. Conversely, the 36–45 age group shows relatively lower engagement (71%).
- By job categories, managers remain the most engaged (90%), while manual workers—the largest employee group—have an engagement level of 72%.
- Most subsidiaries and affiliates report engagement levels above 73%. The highest engagement is observed in «KTZ Express» (90%), «Aktau International Trade Sea Port» (83%), and «Kaztemirtrans» (82%). The lowest levels are in «Freight Transportation» (72%), «Passenger Transportation» Branch (66%), and «Port Kuryk» (50%). Notably, «Port Kuryk» saw a decline from 74% to 50% compared to 2024, a concerning trend requiring further investigation.
- The Corruption Perception Index among employees of «Kazakhstan Temir Zholy» is 70%.
- The Employee Social Well-being Index remains steady at 59%, unchanged from 2024. Women and middle-aged employees (36–45) report lower well-being compared to other groups. Men and younger employees (18–25) rate their social well-being the highest.
- The lowest social well-being levels are recorded in «Port Kuryk», «Passenger Transportation» Branch, «Freight Transportation», and the Track Diagnostics Center.
- A significant portion of «Port Kuryk» employees report a decline in their quality of life compared to the previous year.
- Financial well-being raises concerns. The majority of employees (53%) earn between 151,000 and 300,000 KZT. Only 52% say their salary covers primary expenses.
- 83% of employees have loans, with particularly high debt levels in «Paramilitary Railway Security», «Kedentransservice», and «KTZ Express».
- Savings levels are minimal, with approximately 70% of employees not saving.
- 61% of employees participate in community activities. Lower participation is observed among manual workers (58%) and support staff (58%), possibly due to a lack of work-life balance or motivation to engage in company events.
- The Social Tranquility Index in the company stands at 85%, indicating a generally stable environment. However, some subsidiaries show

- signs of social tension. Particular attention should be paid to «Port Kuryk», where the social tranquility index is 61%, and employees report conflicts, with 22% acknowledging the possibility of protests related to workplace dissatisfaction.
- The psychological climate within teams is generally positive: 9 out of 10 employees describe it as friendly and calm. Additionally, 80% report no conflicts in the past year, confirming a favorable work environment.
  - The majority (65%) of employees do not support protest actions as a means of influencing the employer. However, certain subsidiaries show elevated levels of support or ambivalence toward such actions: «Passenger Transportation» Branch (18% support, 20% undecided) and «Port Kuryk» (15% support, 41% undecided).
  - While the overall likelihood of protest sentiment in the company is low (5%), it is higher in specific organizations: «Port Kuryk» (22%) and «Passenger Transportation» Branch (10%).
  - 8 out of 10 employees feel their labor rights are protected. However, some companies show a decline in perceived protection: «Passenger Transportation» Branch (72%) and «Port Kuryk» (59%).
  - Only 42% of employees are aware of the company's ombudsman institute. The lowest awareness is in «Port Kuryk» (26%), «Aktau International Trade Sea Port» (33%), and the Track Diagnostics Center (34%).

## Engagement

*«Employees don't just want to be heard—they want to feel their contributions matter.»  
Patrick Lencioni, Organizational Culture Expert*

For over a decade, «Samruk-Kazyna» has consistently studied employee engagement. The results show that «Kazakhstan Temir Zholy» employees maintain a consistently high level of participation in production and organizational activities.

In 2020, engagement peaked at 79%. However, from 2021–2023, it dropped significantly to 62% by 2023, likely due to economic conditions, transitions to new

work models, and internal changes. In 2024, a recovery began, and in 2025, engagement rose by 7 percentage points to 73%.

In 2025, employee engagement reached one of the three highest levels recorded from 2013–2025. This reflects the effectiveness of the company's social policies aimed at supporting staff, fostering corporate culture, and creating a favorable work environment.

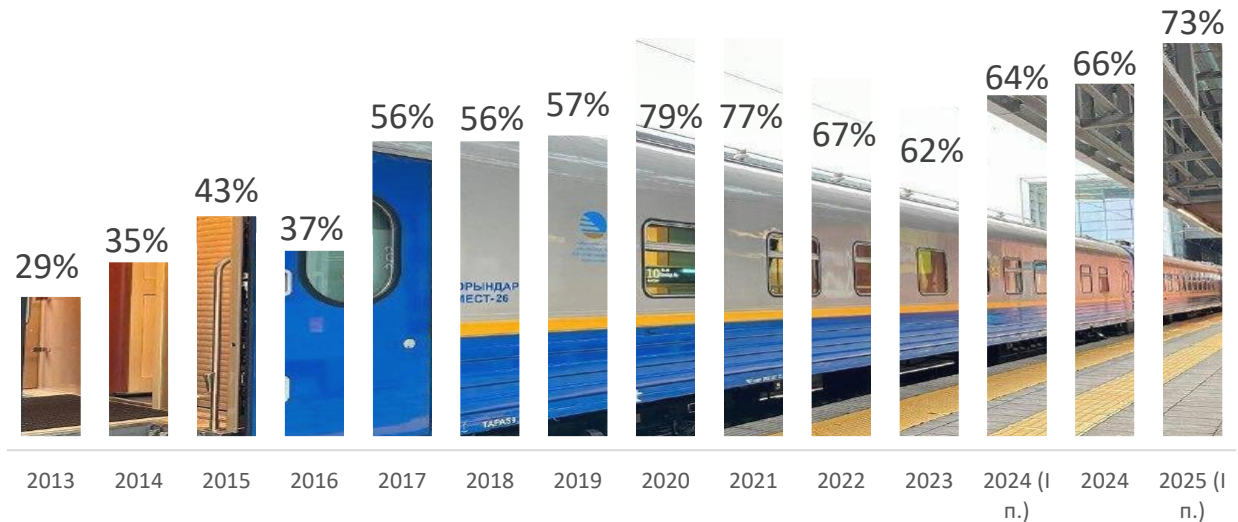


Figure 1. Employee Engagement at «NC Kazakhstan Temir Zholy» for 2013–2025



Studies show that in the transportation sector, including railway companies, employee engagement remains relatively high compared to other industries. According to Culture Amp (2024–2025), engagement in the Transportation/Trucking/Railroad sector ranges from 69–71%, placing it in the upper half of industries. However, Inpulse studies highlight systemic challenges: about half of transportation sector employees feel their opinions are undervalued, and a third feel underappreciated, directly impacting motivation and retention.

Analysis of «Kazakhstan Temir Zholy» employee engagement reveals significant differences by gender and age. Men show slightly higher engagement (73%) than women (71%), possibly due to differences in perceptions of the corporate environment, working conditions, career opportunities, or

satisfaction levels. The highest engagement is among employees aged 18–25 (79%), driven by the start of their careers, high motivation, and adaptability. Conversely, the lowest engagement is among employees aged 36–45 (71%), possibly due to shifting

priorities, accumulated professional stress, or other social factors.

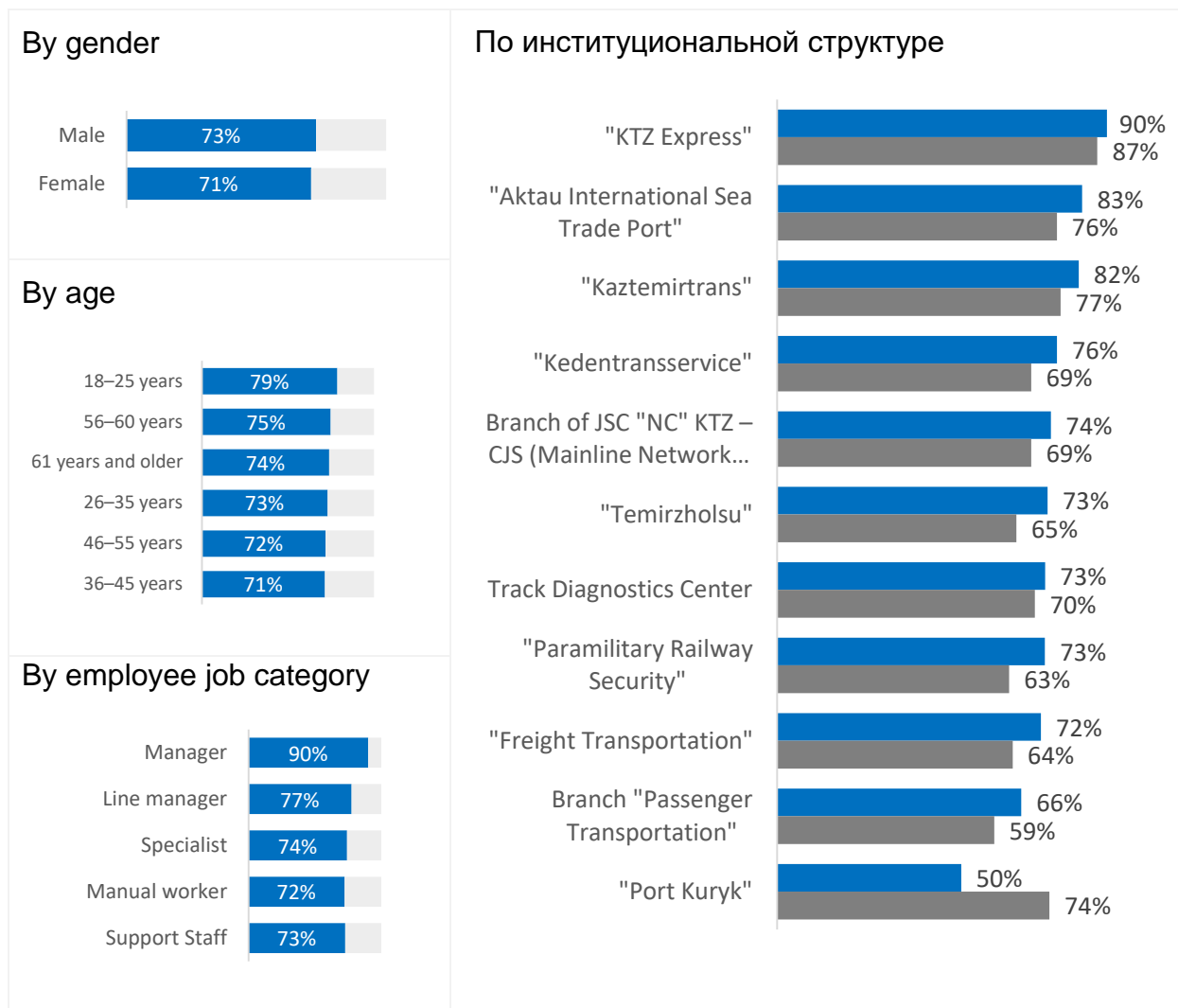


Figure 2. Overall Employee Engagement Data

In terms of job categories, managers show the highest engagement (90%), approximately 20 percentage points higher than manual workers. Line managers have an engagement level of 77%, while manual workers record the lowest at 72%.

Comprehensive analysis of engagement across subsidiaries and affiliates shows consistently high levels of staff involvement in corporate life and production processes. The highest

engagement is in «KTZ Express» (90%), «Aktau International Trade Sea Port» (83%), and «Kaztemirtrans» (82%). Three subsidiaries report engagement below the company average: «Freight Transportation» (72%), «Passenger Transportation» Branch (66%), and «Port Kuryk» (50%). Compared to the previous year, engagement increased in nearly all subsidiaries, but «Port Kuryk» saw a decline from 74% to 50%, a concerning signal requiring further investigation.

Table 1. Engagement of Each Employee

Engaged	Not Engaged	Burned Out
<b>85%</b>	<b>10%</b>	<b>5%</b>

Individual engagement was calculated for each employee. The analysis shows that 85% of staff are classified as engaged—showing interest in their work, actively participating in tasks, aligning with company goals, and feeling significant in achieving collective results. These employees are proactive, eager to develop, and committed to the organization’s success.

10% of respondents fall into the conditionally engaged category. These employees fulfill their duties but lack an emotional connection to their work or

employer, often expressing dissatisfaction with certain aspects of their job while retaining hope for improvement. With support and attention from management, they have the potential to return to high engagement.

The remaining 5% are classified as emotionally burnt out. These employees lack motivation, show little interest in their work, and tend to disengage. They exhibit minimal initiative and may consider leaving. Their presence can negatively impact team morale.

**Burnout**

According to **Gallup** experts, burnout is «a workplace phenomenon characterized by overwhelming fatigue, cynicism, detachment from work, and a sense of ineffectiveness and lack of accomplishment» (**Gallup, 2020**).

The proportion of burnt-out employees remains unchanged at 5%, equating to approximately 5,009 individuals who experience deep despair, lack belief in

positive change, and perform their duties out of a sense of hopelessness, often displaying irritation or negativity.

<b>Burned out employees</b>	
<b>5%</b>	<b>1097</b> people
By gender	

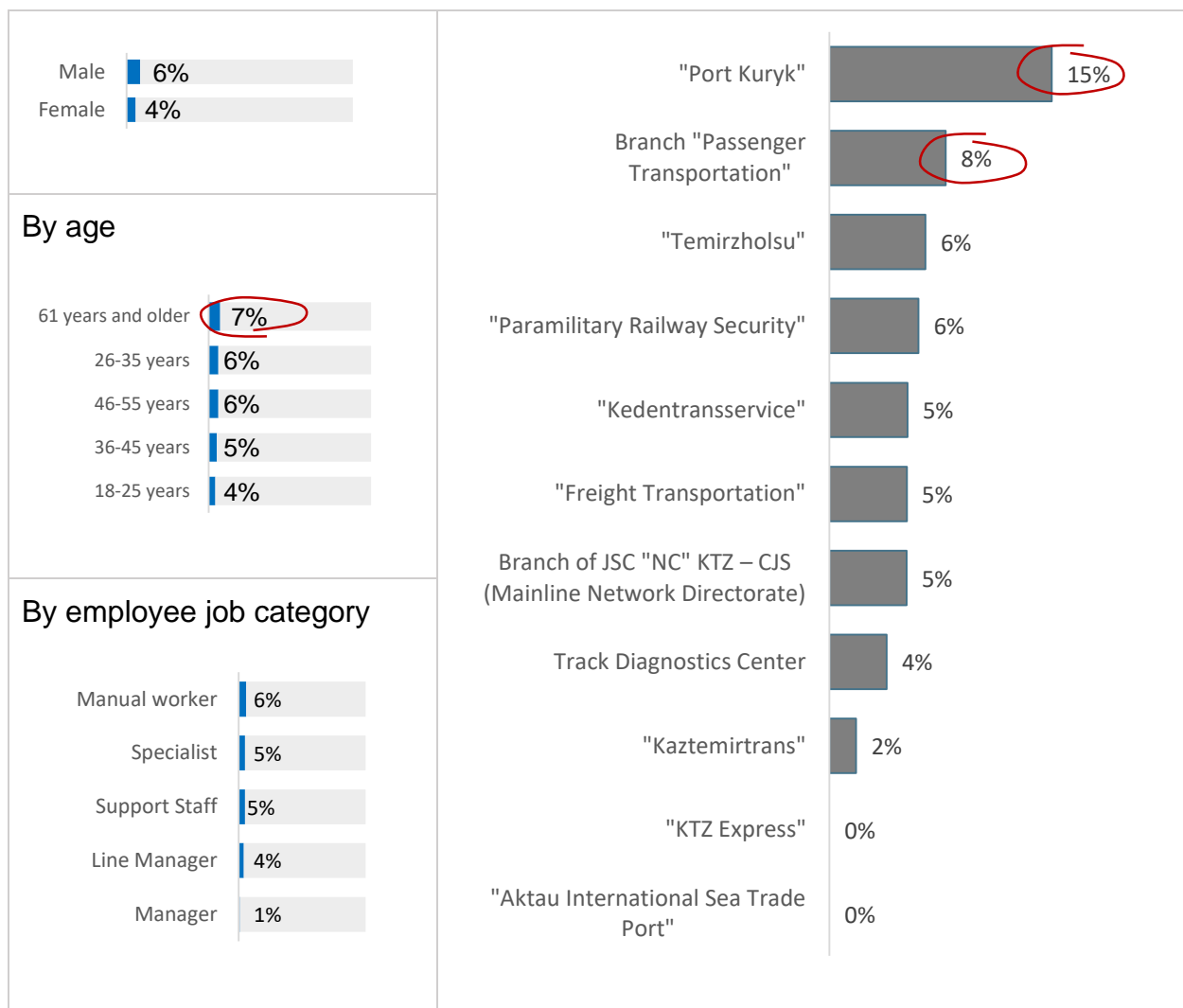


Figure 3. Characteristics of Burned-Out Employees

Analysis of gender structure shows minimal differences in burnout: men report 6%, slightly higher than women at 4%. The lowest burnout is among younger employees (18–25) and older employees (56–60), while the highest is among those over 61. Managers are virtually unaffected by burnout (1%),

while manual workers show the highest rate (6%). Burnout levels across departments range from 0% to 15%. No burnt-out employees are reported in «KTZ Express» or «Aktau International Trade Sea Port», while relatively high levels are noted in «Port Kuryk» and «Passenger Transportation» Branch.

According to the most widely accepted concept, burnout is a three-dimensional syndrome that develops in response to chronic occupational stress (Maslach & Jackson, 1981, 1986; Maslach, Jackson & Leiter, 1996; Maslach et al., 2001) and consists of:

- Emotional exhaustion
- Depersonalization
- Reduced personal accomplishment (lack of professional efficacy or diminished sense of achievement)

The **key factor of burnout** is the absence of an adequate return for invested effort.

## Section Conclusions

- Employee engagement in the first half of 2025 reached **73%**, a **7 percentage point** increase from 2024.
- Men show slightly higher engagement (73%) than women (71%).
- The highest engagement is among employees aged 18–25 (79%), driven by their pursuit of professional growth, adaptability, and openness to change. The 36–45 age group shows lower engagement (71%).
- Managers are the most engaged (90%), while manual workers, the largest group, have an engagement level of 72%.
- Most subsidiaries report engagement above 73%, with the highest in «KTZ Express» (90%), «Aktau International Trade Sea Port» (83%), and «Kaztemirtrans» (82%). The lowest are in «Freight Transportation» (72%), «Passenger Transportation» Branch (66%), and «Port Kuryk» (50%), where a decline from 74% to 50% signals a need for further investigation.

## Engagement of Manual Workers

The year 2025 has been declared the Year of Working Professions in Kazakhstan — a recognition of the importance of specialists who form the foundation of the country’s economy.

This decision highlights the vital role of manual workers in ensuring the sustainable development of Kazakhstan’s infrastructure and industry. It is particularly relevant for the employees of «NC Kazakhstan Temir Zholy» where operational processes directly depend on manual workers.

The Year of Working Professions is an opportunity for «NC Kazakhstan Temir Zholy» to rethink the role of manual workers not only as performers but also as carriers of ideas, innovation, and corporate culture. Drawing on the international example of Evolution Mining, the company can strengthen workplace safety, engagement, career growth, recognition, and inclusive interaction, thereby enhancing the status of its employees and improving operational performance.

40% of the company’s employees identify as manual workers in operational roles. Manual worker engagement at

«NC Kazakhstan Temir Zholy in the first half of 2025 significantly increased from the previous year, reaching 72%.

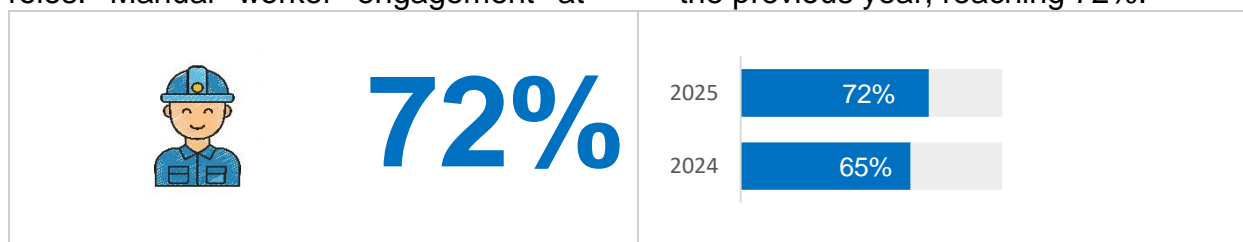


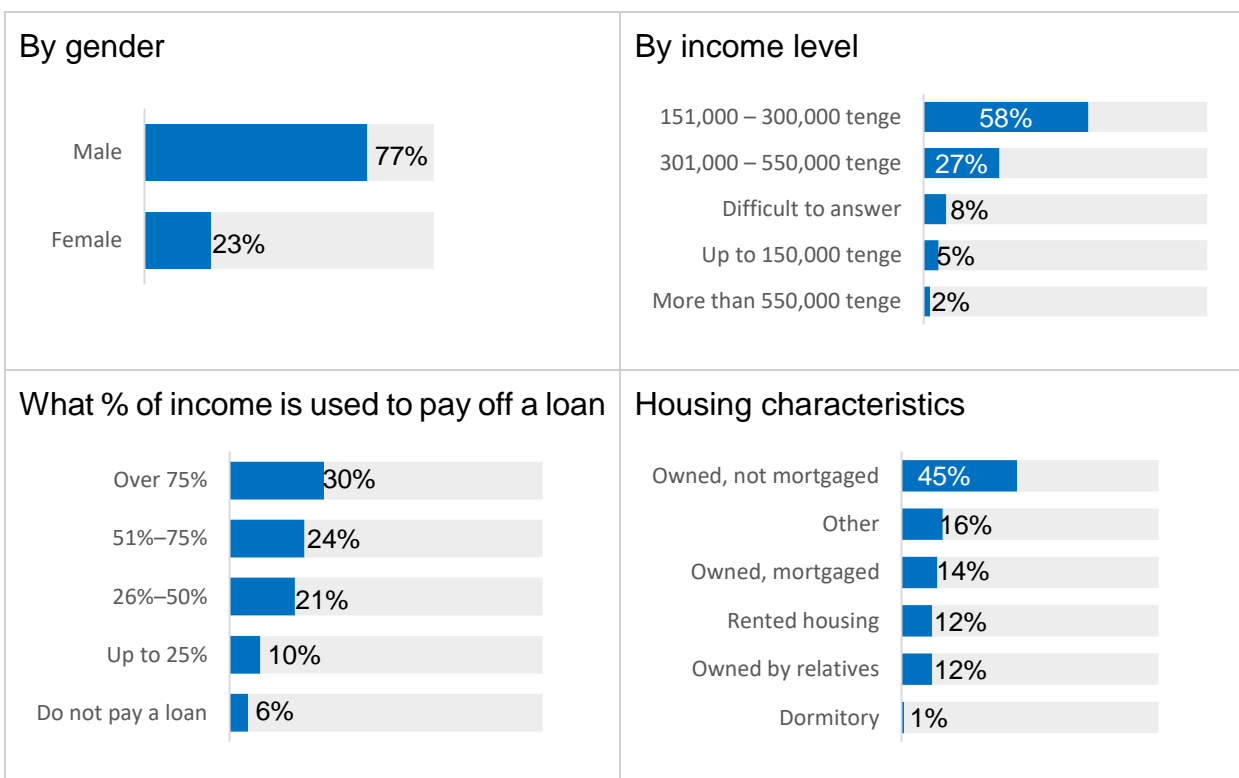
Figure 4. Engagement of Working Professions

In this section, we will analyze the composition of the workforce engaged in

working professions at «NC Kazakhstan Temir Zholy».

The majority of manual workers are men (77%). Most (58%) earn between 151,000 and 300,000 KZT monthly, with another 25% earning 300,000 to 550,000 KZT. However, financial strain remains a significant issue: 85% have loan obligations, with 54% allocating over half their salary to repayments. About 45% own their homes, though 14% have mortgaged properties; others live in rented accommodations or with relatives.

Half of the manual workers have been with the company for over 10 years, indicating high loyalty and commitment. As production efficiency grows, enhancing motivational programs, employee wellness initiatives, and social benefits is critical.



Analysis of key labor aspects shows high positive feedback in areas like workplace safety (95%), absence of moral pressure (93%), and clarity of expectations (96%), reflecting a secure and predictable work environment. Positive responses are also high for workload (87%), equipment and material provision (85%), and social package perception (83%). Fairness in promotions (81%) and consideration of

employee opinions (81%) are also well-regarded.

However, Adequate working conditions (77%) and Opportunities to grow at work (77%) receive less positive feedback, with 21% and 17% negative responses, respectively. The most problematic area is salary satisfaction: only 59% are satisfied, while 34% express negative views. Despite this, the willingness to recommend the company remains relatively high (79%), indicating sustained baseline loyalty.

Table 2. Factors of Manual Worker Engagement

	Positive	Negative
Equipment and materials	85%	13%
Adequate working conditions	77%	21%
Workload	87%	10%
Opportunities to grow at work	77%	17%
No moral pressure	93%	5%
Safety organization	95%	3%
Social package	83%	13%
Fairness of promotion	81%	13%
Salary	59%	34%
Clarity of performance expectations at work	96%	2%
Willingness to recommend the company	79%	15%
Respect for professional opinions	81%	12%

Manual worker engagement is at **72%**, showing positive growth compared to the previous year. Manual workers highly value safety, lack of moral pressure, and clear expectations, but salary levels remain the most significant concern, with the highest negative feedback. Overall loyalty remains strong.

## Manager Engagement



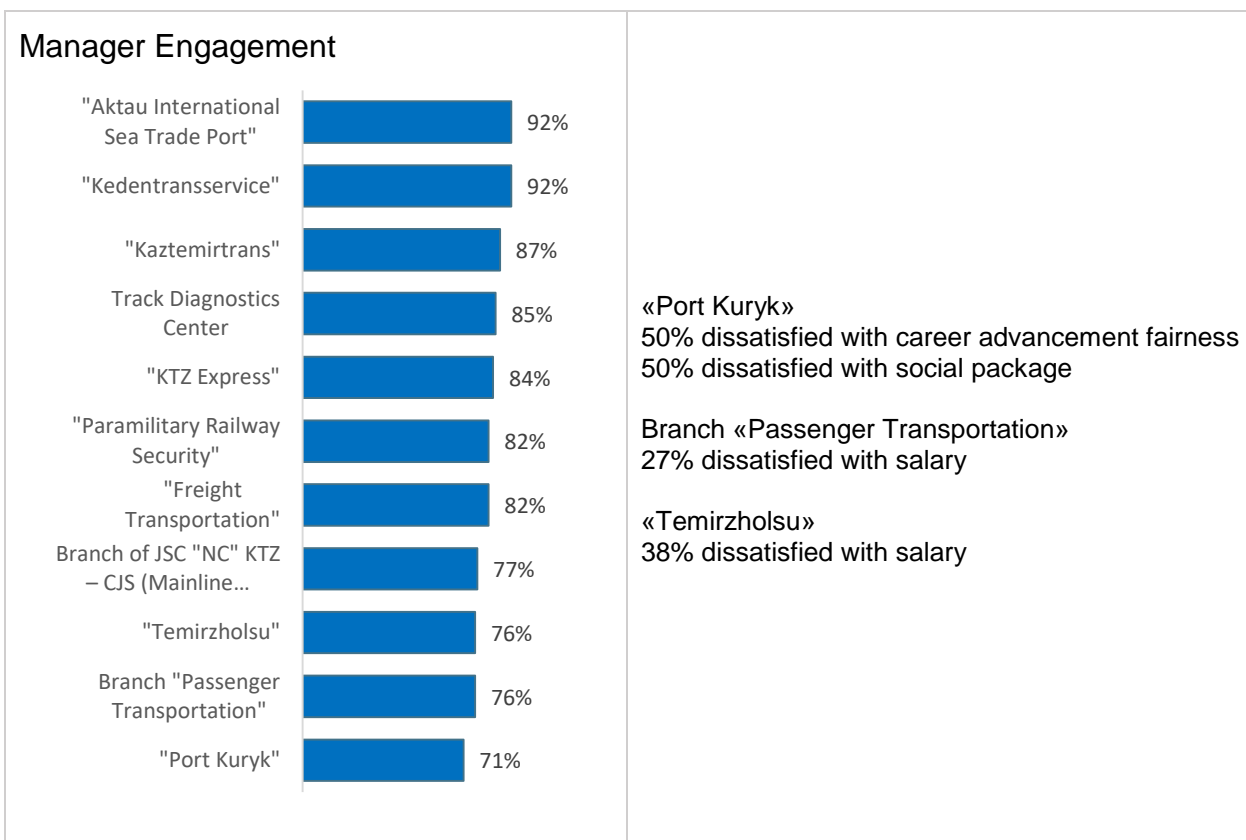
Employee engagement directly depends on the quality of management, with leaders playing a key role in shaping team motivation and mindset. Statistics show that 70% of engagement variation is determined by the immediate manager. Research further confirms that employees who feel supported and trusted by their leaders are 53% more engaged. Conversely, declining manager engagement negatively affects their teams: a drop of 3 percentage points among managers (from 30% to 27%) led to an overall decline in employee engagement in 2024. This demonstrates that investing in leadership development—through training, regular feedback, coaching, and building trust—directly strengthens engagement and reduces burnout risks among staff.

Analysis of managerial staff engagement shows that the average engagement level among managers is 79%, which is above the corporate average. Managers

demonstrate the highest results (90%), while line managers score slightly lower (77%). This highlights the crucial role of management in building sustainable

employee engagement. Across company divisions, managerial engagement ranges from 71% to 92%, with the

highest levels recorded at «Aktau International Sea Trade Port» and «Kedentransservice.»



In subsidiaries with managerial engagement below 80%, priority should be given to developing management competencies, training in motivation, feedback, emotional intelligence, and leadership. Collaboration with regional HR units should be strengthened to diagnose local causes of burnout and low engagement.

In some subsidiaries, critical levels of managerial dissatisfaction with key labor conditions directly impact their engagement and, consequently, overall staff engagement. For instance, in «Port

Kuryk», 50% of managers are dissatisfied with the social package, and 50% perceive promotions as unfair. In «Passenger Transportation» Branch, 27% of managers, and in «Temirzholsu», 38%, are dissatisfied with salary levels.

These findings point to systemic issues in certain subsidiaries, where dissatisfaction with basic conditions combines with perceptions of unfairness and lack of prospects, risking further declines in engagement, turnover, and efficiency.

### Section Conclusions:

- Managerial engagement is at 79%, above the company average, with top executives at 90% and line managers at 77%, highlighting their critical role in sustaining employee engagement

- The highest managerial engagement is in «Aktau International Trade Sea Port» and «Kedentransservice».
- In «Port Kuryk», engagement is only 71%.
- In subsidiaries with lower engagement («Port Kuryk», «Passenger Transportation» Branch, «Temirzholsu»), key barriers include inadequate salaries, weak social packages, and lack of transparency in promotions.

## Engagement Drivers



One of the key drivers of employee engagement is the sense of meaning and value in one’s work, along with having the necessary resources and support to perform it effectively.

A study published in *Frontiers in Psychology*, based on self-determination theory, found that employees who perceive their work as meaningful show higher levels of engagement and motivation, with the company’s purpose directly enhancing their commitment.

Research by Emerald Publishing further confirms that adequate resources—including social support, feedback, training, and autonomy over workload and tasks—reduce burnout and strengthen engagement.

Finally, according to Oxford University, emotionally satisfied employees are 13% more productive, and companies with engaged staff consistently achieve up to 22% higher performance.

According to the methodology, employee engagement is measured by 12 key factors: 3 relate to satisfaction with

working conditions, 5 to employee loyalty, and 4 to satisfaction with company communications.

Table 3. Engagement Factors, Share of Positive Responses

No	Factors	2023	2024	2025
1	Equipment and materials	78%	80%	84%
2	Adequate working conditions	70%	73%	77%
3	Workload	85%	↓82%	86%
4	Opportunities to grow at work	78%	80%	↓78%
5	No moral pressure	91%	↓90%	92%
6	Safety organization	87%	92%	95%
7	Social package	73%	80%	83%
8	Fairness of promotion	74%	77%	81%
9	Salary	47%	48%	59%
10	Clarity of performance expectations at work	89%	92%	96%
11	Willingness to recommend the company	74%	76%	79%
12	Respect for professional opinions	78%	81%	83%

According to the methodology, employee engagement is measured by 12 key

factors: 3 relate to satisfaction with working conditions, 5 to employee

loyalty, and 4 to satisfaction with company communications.

Analysis of 2023–2025 data highlights key engagement drivers that most influence employees' attitudes, commitment, and loyalty.

Safety organisation is a primary driver, reaching 95% positive feedback in 2025, with steady growth over the past three years. It forms the foundation of engagement, fostering trust in the employer.

The second key driver is clarity of performance expectations, increasing from 89% in 2023 to 96% in 2025, reflecting significant progress in managerial communications. Employees better understand their tasks, responsibilities, and evaluation criteria, boosting motivation and reducing uncertainty.

Corporate climate and fairness in career advancement are also notable. The psychological atmosphere is consistently rated highly (92% in 2025), and fairness in promotions rose to 81%, building trust in management practices. Consideration of professional opinions is rated at 83%.

## Engagement Barriers

Despite the positive dynamics in a number of indicators, in 2025 several factors emerged that may hinder the development of employee engagement and cause internal tension. The most notable signal comes from the indicator of satisfaction with opportunities for training and professional growth. Here, a decline is observed from 86% to 82%. This may be linked both to the absence of clear career tracks and to limited access to training programs. When employees do not see prospects for development, motivation weakens,

Thus, the primary engagement drivers are workplace safety, clarity of expectations, compensation systems, and fairness in promotions. Strengthening these areas ensures sustained engagement and supports productivity and retention.

In addition to engagement factors, the study also collected employees' opinions on a range of working conditions.

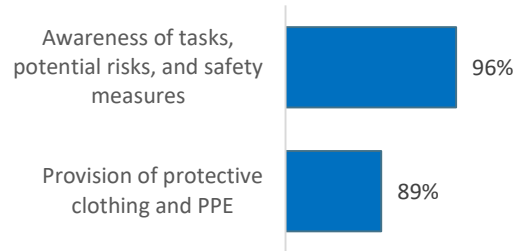


Figure 5. Work Safety Factors

Employees also provided feedback on various labor conditions. In 2025, employees highly rate the provision of personal protective equipment and workwear (89%) and awareness of task nature, risks, and safety measures (96%), reflecting transparent communications and effective safety procedures..

especially among those who are focused on growth and self-realization.

Particular attention should be paid to the decline in employees' willingness to recommend the company to friends and acquaintances. In 2024, this indicator stood at 90%, whereas in 2025 it dropped to 87%. Such dynamics may reflect an overall decrease in job satisfaction or growing external competition in the labor market. Recommendations are one of the most important indicators of genuine engagement: if an employee is unwilling

to recommend the employer, it often signals internal doubts and emotional detachment from the company.

Satisfaction with salary remains consistently low — 67% both in 2024 and 2025. Although the figure has not worsened, the level itself highlights ongoing discontent between employees' contributions and their compensation. This is a sensitive factor, especially during periods of inflation or increased consumer pressure, and it can directly affect staff retention.

The indicator of fairness in career advancement also remains unchanged at 84%. The absence of progress may be perceived by employees as a signal that the promotion system is not evolving, becoming more transparent, or objective. For those striving for career growth, this can be a demotivating factor.

Thus, in 2025 the company demonstrates stable results across a number of key engagement parameters, but requires close attention to areas related to development, career opportunities, and fair compensation. These barriers can significantly reduce motivation, particularly among key employees and specialists.

## Corruption Perception Index

According to European Commission studies, 68% of EU citizens believe corruption is widespread in their country, yet 58% doubt government efforts to combat it. Only 6% have witnessed corruption in the past year, but just 15% reported it. Over 50% are unaware of reporting channels, and nearly half believe proving corruption is difficult.

Globally, 39% of non-compliance staff believe offering bribes to officials for favorable outcomes is acceptable, and 48% think such employees receive internal rewards or promotions. According to the Kroll Global Fraud and Risk Report, 36% of companies worldwide report significant negative impacts from corruption, with larger firms (\$10–15 billion turnover) noting 48–57% severe effects.

SpringerLink research across 31 European countries links higher corruption levels to poorer psychosocial climates, characterized by increased stress, reduced managerial support, and worse employee health.

The Corruption Perception Index at «Kazakhstan Temir Zholy» is 70%.



Figure 6. Factors of the Corruption Index

The survey results show that employee awareness of anti-corruption mechanisms remains relatively high: 83% of employees know where to report a corruption offense. At the same time, 77% of respondents are confident that the company will take the necessary measures upon receiving such a report, which indicates trust in the compliance system and internal procedures.

However, certain risk areas remain. Specifically, 16% of employees reported that they had witnessed corrupt practices or heard of such cases within the company. In addition, 16% of respondents admitted the possibility of resolving issues through “illegal” means, indicating the presence of a group of employees with a tolerant attitude toward corruption.

Overall, these results reflect a moderately positive perception of the company’s anti-corruption practices but also highlight the need to strengthen internal prevention measures, conduct regular communication campaigns, and foster a culture of zero tolerance toward corruption.

## Employee Well-being

Employee well-being is a complex, multidimensional concept encompassing emotional and cognitive perceptions of life and work conditions. It is not merely the absence of stress or dissatisfaction but an active sense of satisfaction, resilience, and professional purpose.

Employees with high well-being show sustained motivation, engagement, productivity, and readiness for growth. Well-being is influenced by internal factors (self-esteem, resilience) and external factors (management

interactions, work conditions, development opportunities).

Participation in wellness programs boosts productivity by 12% and retention by 20%. 60% of employees report increased engagement through such programs, and companies see up to 25% productivity gains. 47% of employers note productivity increases when employees feel their health and well-being are valued.

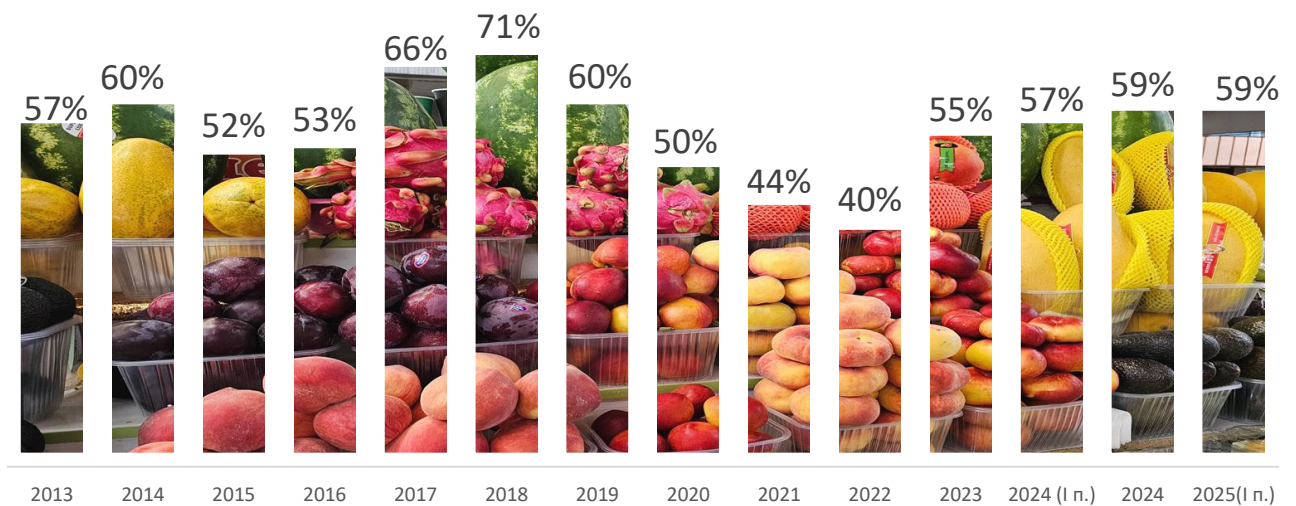
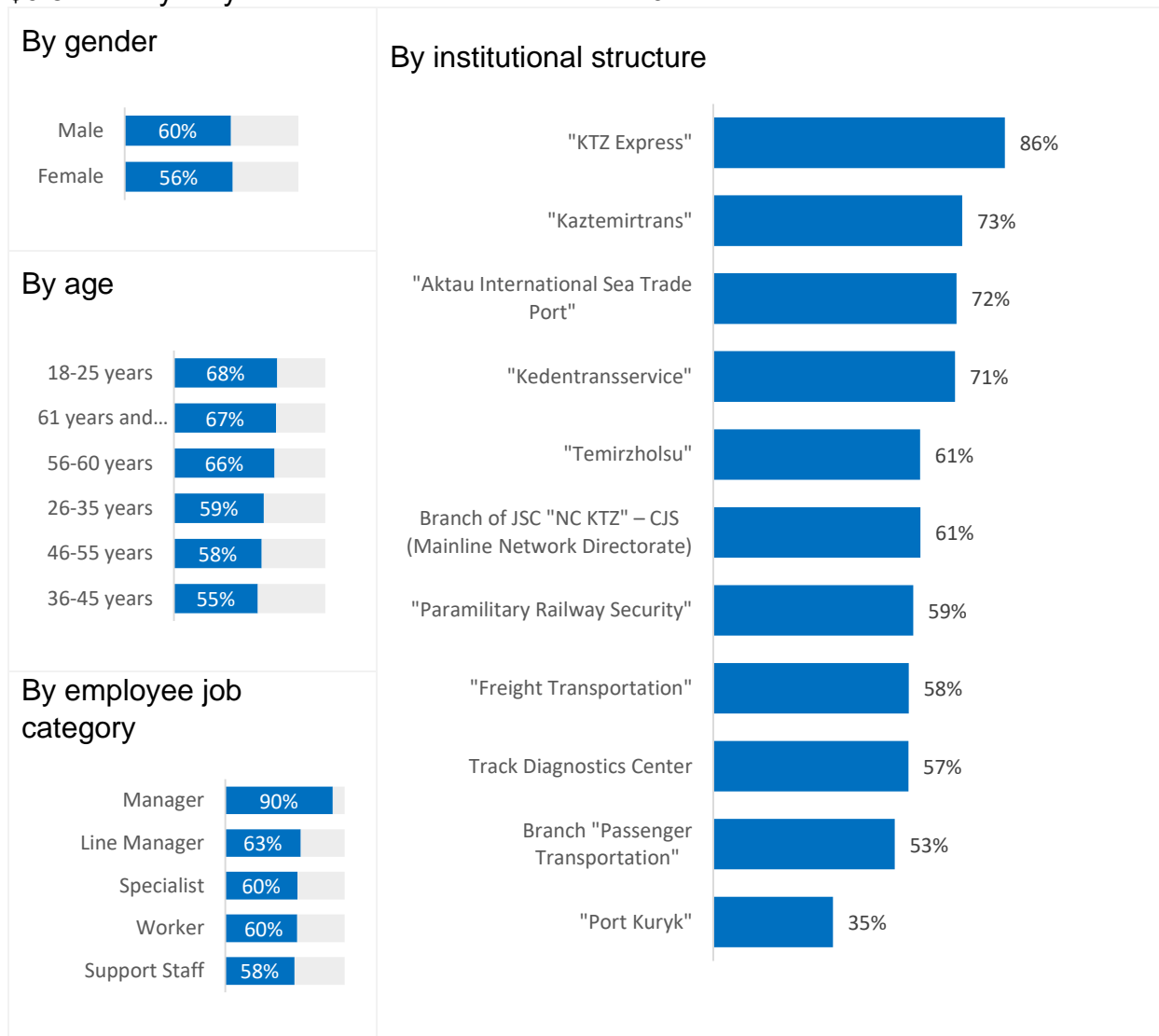


Figure 7. Employees' Social Well-Being for the Period 2013–2025 years

Lack of well-being can lead to anxiety, burnout, reduced efficiency, and turnover. Depression and anxiety-related illnesses cost the global economy 12 billion working days annually, valued at \$1 trillion. Burnout costs employers billions, with Gen Z and millennial employees in Australia alone costing \$6.8 billion yearly.

Thus, well-being is a strategic tool for HR management, reducing stress, enhancing motivation, engagement, and resilience, ultimately improving efficiency and competitiveness.

The Social Well-being Index for the first half of 2025 is 59%, unchanged from 2024, showing gradual growth since 2022.



Index of Well-being varies by gender, age, job category, and region. Women report lower well-being (56%) than men (60%), possibly due to higher stress and balancing professional and family roles. The least satisfied group is employees aged 36–45 (55%), facing high workloads, career growth expectations, and burnout risks with limited organizational support. The highest well-being is among employees aged 18–25 and older (68%), reflecting adaptability and moderate career expectations. Interestingly, employees aged 56–60 report above-average well-being, likely due to enthusiasm, learning receptivity, and lower fatigue.

By job category, managers show the highest well-being (90%), while specialists, manual workers, and support staff report lower levels (58–60%). The lowest well-being is in «Port Kuryk» (35%) and «Passenger Transportation» Branch (53%), with below-average levels in «Freight Transportation» and the Track Diagnostics Center.

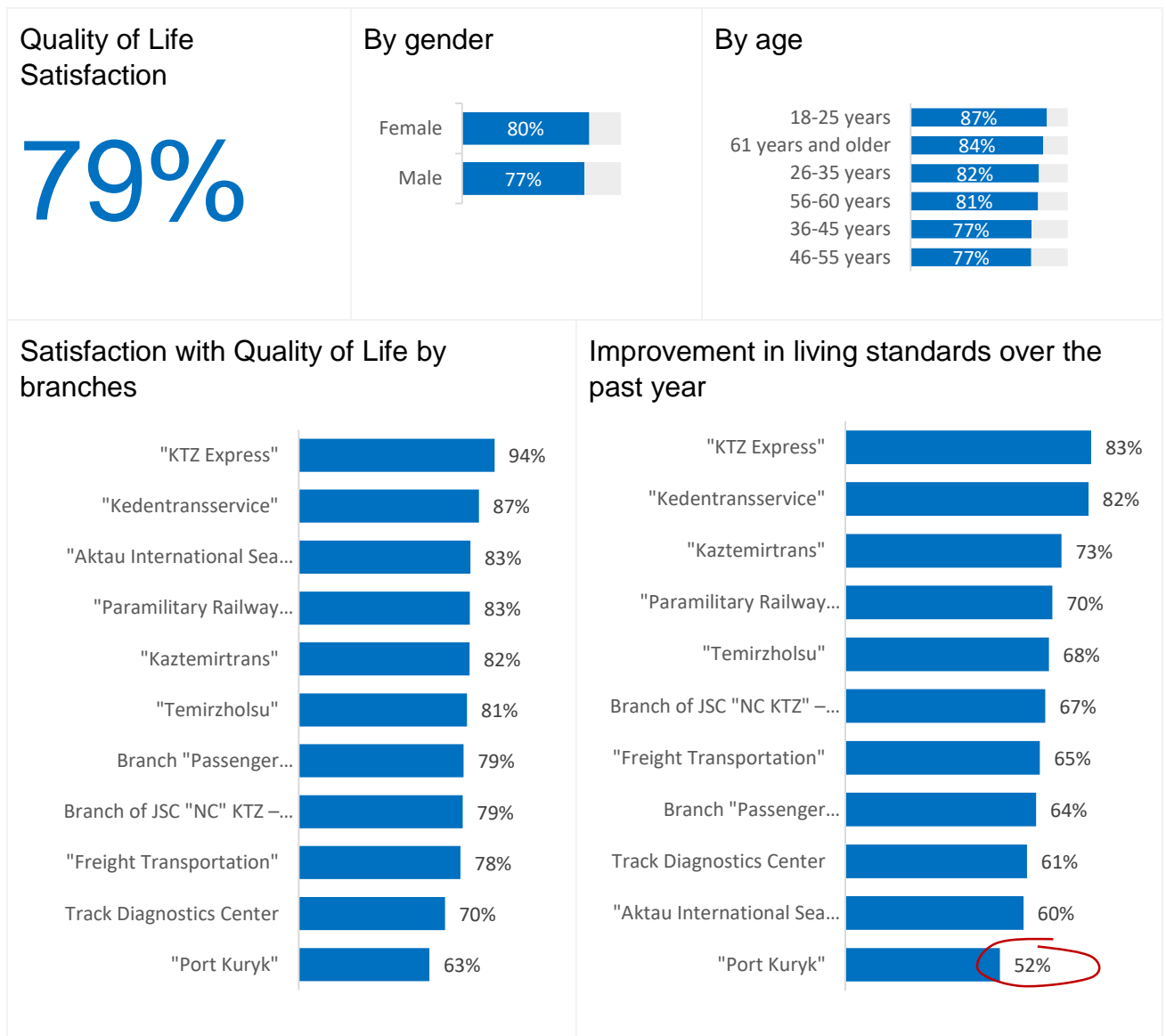
## Satisfaction with Quality of Life

Satisfaction with quality of life reflects subjective perceptions of personal and professional circumstances. On average, 80% of employees rate their lives positively, indicating prevailing tranquility and harmony.

Men report higher satisfaction (80%) than women (77%), possibly due to

differences in family and work responsibilities or employer support.

This may be explained by differences in the distribution of family and work responsibilities, as well as varying levels of employer support.



Age categories demonstrate varying results. The most positive life quality assessments come from young specialists aged 18–25, with 87%. This outcome is largely associated with the beginning of their professional journey,

the presence of prospects, and enthusiasm. High values are also observed among employees over 61 years old (84%), reflecting a calmer perception of the social and work

environment, as well as satisfaction with their achieved results.

At the same time, mid-age employees — between 36 and 55 years old — demonstrate the lowest level of satisfaction (77%). The likely reasons are a combination of heavy professional workload, limited career advancement opportunities, and the need to balance work and family roles.

The highest levels of life quality satisfaction were recorded among employees of “Kedentransservice” and “KTZ Express” — ranging from 87% to 94%. These figures may indicate both a high level of overall well-being in the regions and a positive perception of

working conditions on site. Meanwhile, employees of “Port Kuryk” are the least satisfied with their lives (63%). Low values in this division may be related to a combination of factors: unfavorable socio-economic conditions, reduced engagement, and dissatisfaction with professional fulfillment.

Regarding improvements in quality of life over the past year, only 66% of employees stated that their lives had improved. It is worth noting that a comparatively larger share of employees at “Port Kuryk” reported that their lives had worsened in 2025 compared to the previous year.

### Financial Well-being

As dissatisfaction with pay fairness is a common issue, financial well-being is critical. Many employees feel their compensation does not match their efforts or responsibilities. Financial tranquility depends not only on income but also on financial management skills, making financial literacy programs essential.

Employees with high financial literacy experience 37% less stress and 49% less anxiety, and are more likely to rate their mental, social, and physical health as excellent.

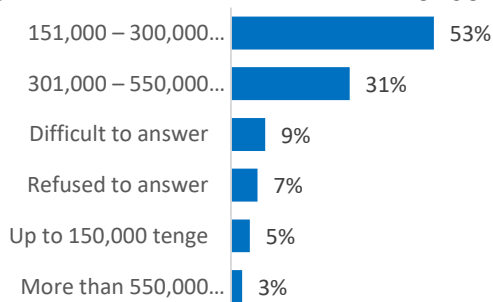


Figure 8. Please indicate your average monthly income level

The survey examined and clarified the distribution of employees’ average income levels, providing a more accurate understanding of financial well-being across the workforce.

Most employees (53%) earn 151,000 to 300,000 KZT monthly, 33% earn 300,000 to 550,000 KZT, 5% earn less than 150,000 KZT, and 3% earn over 550,000 KZT. 16% withheld income information.

Pay fairness perception depends on dependents. About 33% have no dependents, 25% support one child, 33% support two or three people, and 13% support over four. Higher financial burdens reduce satisfaction with income.

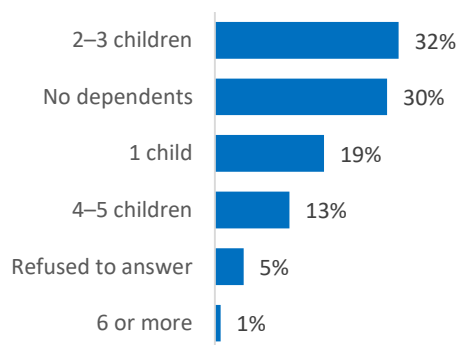


Figure 9. Number of Minor Children in the Household

Survey data indicate that only 31% of employees reported that their salaries are sufficient to cover all monthly expenses. This means that only one in three manual workers feels financially stable at their current income level.

Another 21% of respondents indicated that their income is “mostly sufficient,” but with reservations—maintaining their budget requires strict spending planning, forgoing some habitual expenses, and limiting purchases beyond basic needs. This situation can be described as “precarious financial balance,” where even minor external changes (price increases, unexpected expenses, or medical costs) can trigger stress and resource shortages.

The most vulnerable group comprises 40% of respondents who explicitly stated that their salary is insufficient to meet their family’s needs. This indicates that nearly half of the workforce is effectively living under chronic financial stress. In such circumstances, employees are more likely to take on loans and must cut spending on health, education, or leisure, which in the long term negatively impacts not only their personal well-being but also their work engagement.

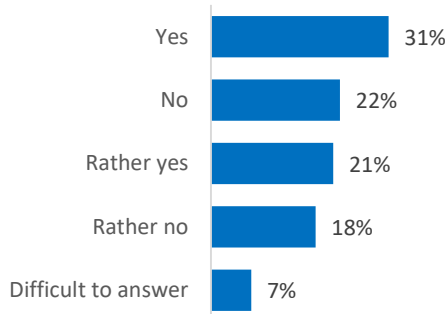


Figure 10. Does your salary cover your family’s basic expenses (food, clothing, utilities)?

Significant differences in salary sufficiency for covering expenses are observed across staff categories. Among managers, 62% report that their salaries are sufficient to cover basic expenses, whereas only 50% of manual workers say the same.

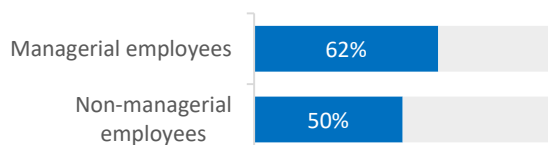


Figure 11. Does your salary cover your family’s basic expenses (share of positive responses)?

Branch-level data reveal substantial variability in employees’ perceptions of salary sufficiency for covering basic family expenses. The highest levels are observed at «KTZ Express» (77%) and «Aktau International Sea Trade Port,» which may reflect both higher income levels and comparatively lower living costs in these regions.

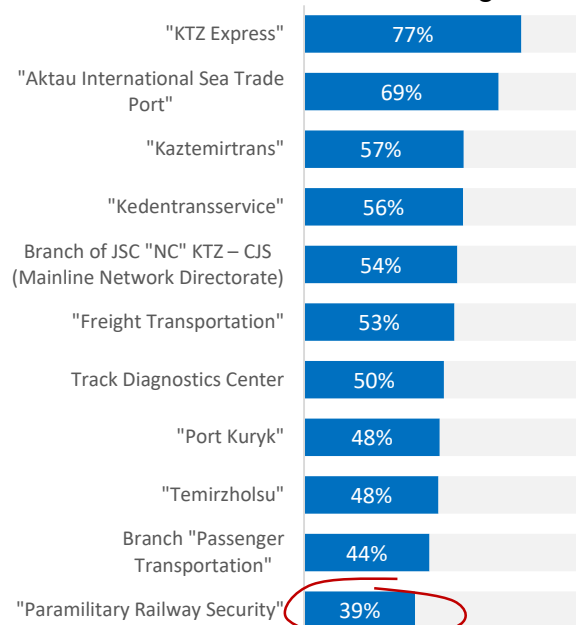


Figure 12. Does your salary cover your family’s basic expenses (share of positive responses)?

At the same time, the situation in several branches is concerning: the share of positive responses is particularly low in «Paramilitary Railway Security» (39%), «Passenger Transportation» (44%), «Temirzholsu» (48%), and «Port Kuryk» (48%). This suggests that a substantial portion of employees face difficulties in meeting their family’s basic needs.

It can be assumed that a significant portion of employees’ income is directed toward servicing loans. According to the survey, 8 out of 10 employees have a loan, microloan, or installment plan. Only 6% reported having no credit obligations, while about 11% chose not to answer this question, which may also indicate the sensitivity of financial information.

Particular attention is drawn to the level of indebtedness: one-third of «NC

Kazakhstan Temir Zholy» employees are compelled to allocate up to 75% of their salary to debt repayment. Another 44% spend between one-quarter and three-quarters of their income on loan payments. Thus, over 70% of the workforce faces a situation in which credit obligations significantly restrict their financial freedom and capacity to build savings.

Such a financial burden has several implications. First, a high level of indebtedness reduces employees' perceived financial tranquility: even with a formally sufficient income, employees experience stress and feel uncertain about their financial situation. Second, regular large loan repayments limit employees' consumer activity, negatively affecting their quality of life and increasing psychological pressure. Third, debt obligations make employees more vulnerable to external changes, such as inflation, rising prices of goods and services, or higher interest rates.

For the company, this translates into additional risks: employees facing financial difficulties are more likely to exhibit reduced focus, engagement, and productivity, as well as a higher susceptibility to emotional burnout. In the long term, this may impact the overall effectiveness of the workforce.

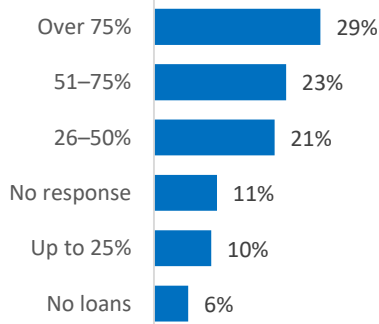


Figure 13. What portion of your household income do you spend on loan repayments (installments, car loans, mortgages, microloans)?

Branch-level data indicate a relatively high level of employee indebtedness across many regions. In most units, around 80% of employees reported

having loan obligations, highlighting a widespread financial burden on the workforce.

The highest proportion of employees with loan obligations is observed in subsidiaries such as “Paramilitary Railway Security,” “Kedentransservice,” and “KTZ Express.” Notably, the situation at “KTZ Express” draws particular attention, as employees demonstrate high scores across most survey parameters, including social well-being, satisfaction, and engagement.

This discrepancy raises questions: on one hand, significant indebtedness would be expected to negatively affect employees' perceived well-being; on the other hand, respondents report positive outcomes in the survey. This contradiction may indicate either a high level of adaptability and resilience among employees in this company or potential biases in perception or data interpretation.

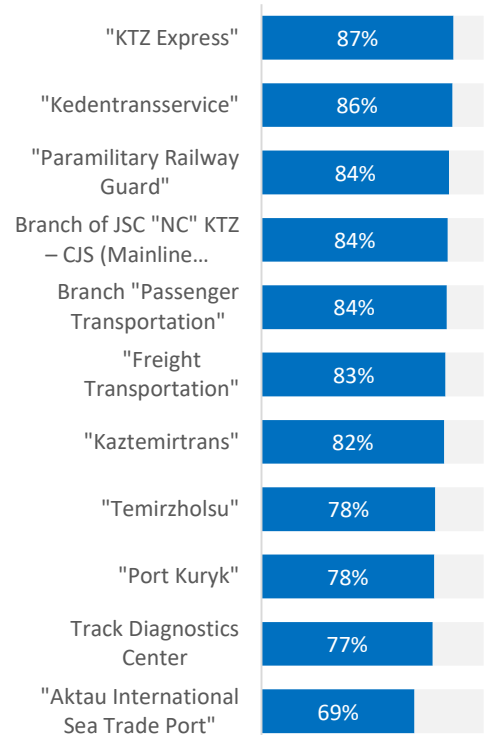


Figure 14. Employee indebtedness levels by branch

At the same time, the lowest level of employee indebtedness is observed at “Aktau International Sea Trade Port.” Overall, these findings highlight the need to develop corporate financial literacy programs.

Beyond indebtedness, another key indicator of financial literacy is employees’ ability to build savings—that is, to regularly set aside funds and create a financial “safety cushion.” Survey results reveal a concerning trend: 66% of employees do not have a habit of saving, indicating a high dependence on current income and a lack of reserves for unforeseen circumstances. An additional 8% of respondents did not answer this question, which may indirectly reflect the sensitivity of the topic or reluctance to acknowledge the absence of savings.

Among those who do save, financial activity remains limited. One in five employees sets aside less than 10% of their monthly income—generally insufficient to build sustainable long-term

reserves. Only 7% of employees are able to save more than 10% of their salary, representing a group with a relatively high level of financial resilience.

This distribution of savings indicates significant financial strain: a large portion of income is directed toward basic expenses and loan repayments, leaving little room for savings. It also points to low preparedness for unforeseen events—the absence of a “safety cushion” makes most employees vulnerable to financial shocks such as illness, job loss, or rising prices.

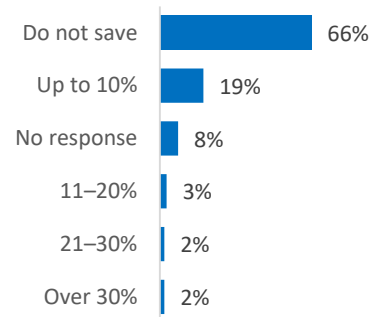


Figure 15. What portion of their income do employees save?

### Corporate Volunteering

Corporate volunteering is a powerful driver of employee engagement and organizational culture. According to research, employees who participate in volunteer programs are five times more likely to be engaged, and 71% of them report increased job satisfaction. Additionally, corporate volunteering initiatives enhance team cohesion—93% of participants feel a strong connection to their employer. Moreover, companies implementing such programs can see up to a 50% reduction in employee turnover. This demonstrates that engaging volunteer activities not only benefit society but also significantly strengthen employees’ intrinsic motivation and corporate loyalty.

Survey results show that approximately 61% of employees actively participate in

community life, while 36% report not being actively involved. The remaining 3% chose not to answer this question.

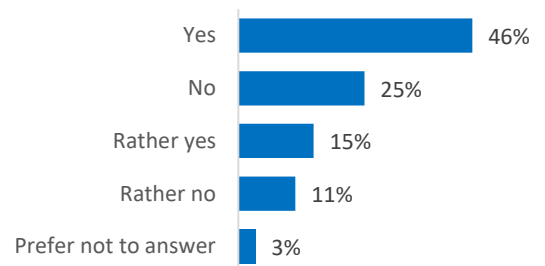


Figure 16. Do you participate in community life (volunteer, sports, or cultural activities)?

Analysis of employee engagement in corporate volunteering and social activities revealed notable gender differences. Men are more active, with 64% participating in such initiatives, compared to 52% of women.

Several factors may explain this disparity. First, men are more likely to engage in physically oriented or logistics-related activities, which traditionally dominate corporate volunteer programs. Second, women’s participation may be constrained by additional social and family responsibilities, limiting opportunities for involvement in extracurricular activities. Third, differences in perception of corporate culture and the value of volunteer projects may also play a role.

International data indicate that formal volunteering programs (e.g., corporate and community projects) are predominantly male (54%), whereas informal volunteering is more common among women (53%). According to WiFitTalents (USA, 2025), women are generally more active in volunteering than men: 24% of women versus 19% of men regularly engage in nonprofit activities. A study covering 19 countries with 37,560 respondents found that 19.2% of men versus 16.9% of women participated in any form of volunteering, confirming a male bias in formal frameworks.

Overall, the global picture suggests that women show higher engagement in volunteering overall, especially in informal sectors, while formal initiatives—including corporate programs—tend to attract men slightly more.

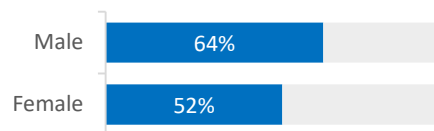


Figure 17. Participation in community life (volunteer, sports, and cultural activities) by gender

Engagement in community life is higher among managers (93%), line managers (68%), and specialists (67%). Lower participation is observed among support staff and laborers, at 58%.

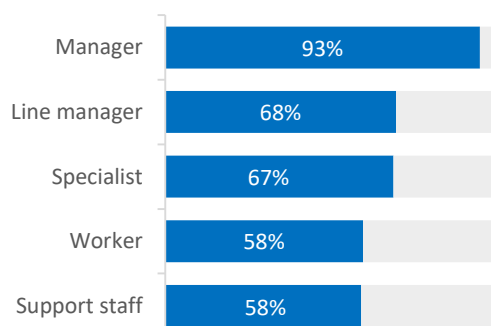


Figure 18. Participation in community life (volunteer, sports, and cultural activities) by employee category

## Section Conclusion

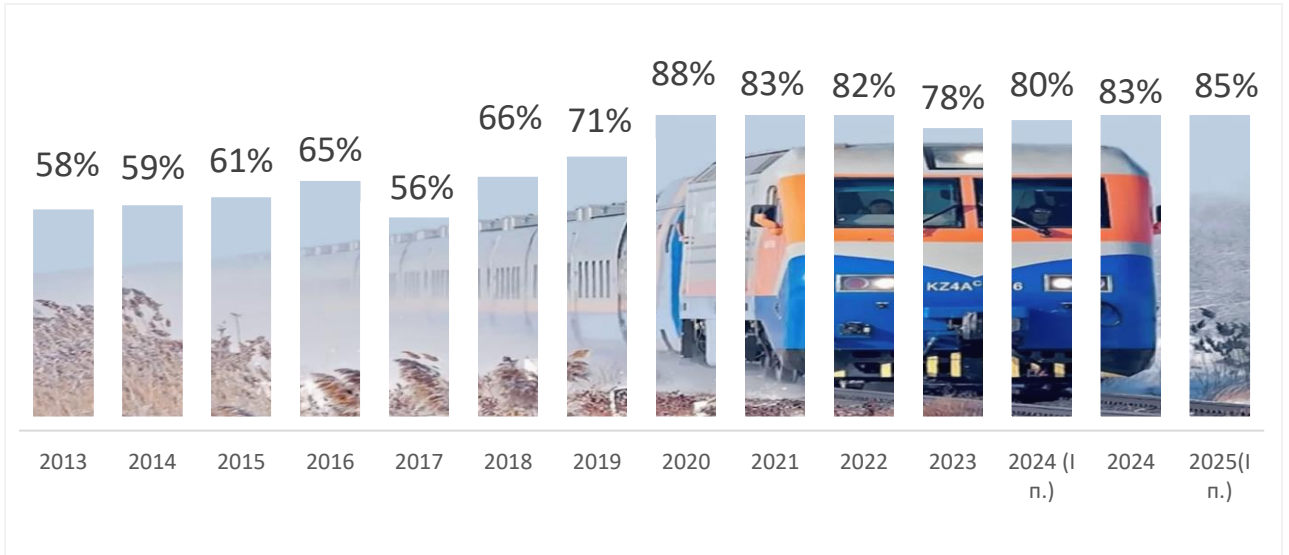
- Social Well-Being Index stands at 59%, which is the same level as in the previous year (59% in 2024). Women and employees aged 36–45 assess their well-being lower than other groups. The highest ratings are observed among men and employees aged 18–25.
- The lowest levels of social well-being were recorded at Port Kuryk, the Passenger Transportation branch, Freight Transportation, and the Track Diagnostics Center.
- A majority of employees at Port Kuryk reported that their quality of life has worsened compared to last year.
- Financial well-being remains a concern. Most employees (53%) earn between 151,000 and 300,000 tenge, while only 52% state that their salary covers basic expenses.
- 83% of employees have loans. The level of indebtedness is particularly high at *Paramilitary Railway Security*, *Kedentransservice*, and *KTZ Express*.
- Savings levels remain minimal, with around 70% of employees not making any savings.

- 61% of employees participate in social activities. Low engagement is especially evident among workers (58%) and support staff (58%), which may be linked to a lack of work–life balance and limited motivation to take part in company events.

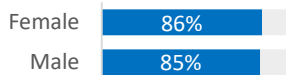
## Industrial Relations

The interaction between employees, management, and labor representatives, including state institutions, forms the basis of labor relations. The Social

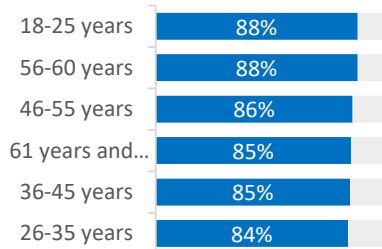
Tranquility Index, based on sociological surveys, assesses the internal climate and employee satisfaction.



### By gender



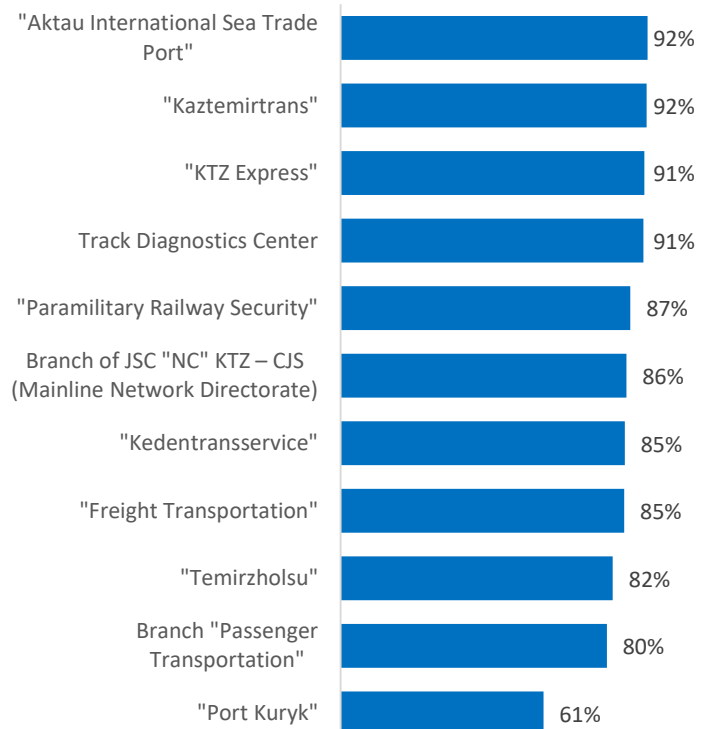
### By age



### By employee category



### By institutional structure



The Social Tranquility Index at «Kazakhstan Temir Zholy» for the first half of 2025 is 85%, up 2 percentage points from the previous year. The index varies slightly by gender and age but remains high across groups. Significant differences exist among subsidiaries, with the highest values in «Aktau International Trade Sea Port», «Kaztemirtrans», and «KTZ Express». Subsidiaries with indices below 85% have a relatively good but lower situation,

with «Port Kuryk» at 61% requiring urgent attention. Forecast analysis suggests the index may remain at 85% over the next three years, but regions with risks of deterioration need close monitoring.

According to the conducted forecast analysis, the Social Tranquility Index is expected to remain at 85% over the next three years. However, special attention should be paid to regions where there is a significant risk of deterioration.

Table 4. Forecast of the Social Tranquility Index for 2026–2028

Year	Point Forecast	Lo 80	Hi 80	Lo 95	Hi 95
2026	84.77934	75.46477	94.09391	70.53393	99.02474
2027	84.77934	72.19244	97.36624	65.52933	104.02934
2028	84.77934	69.61033	99.94835	61.58033	107.97834

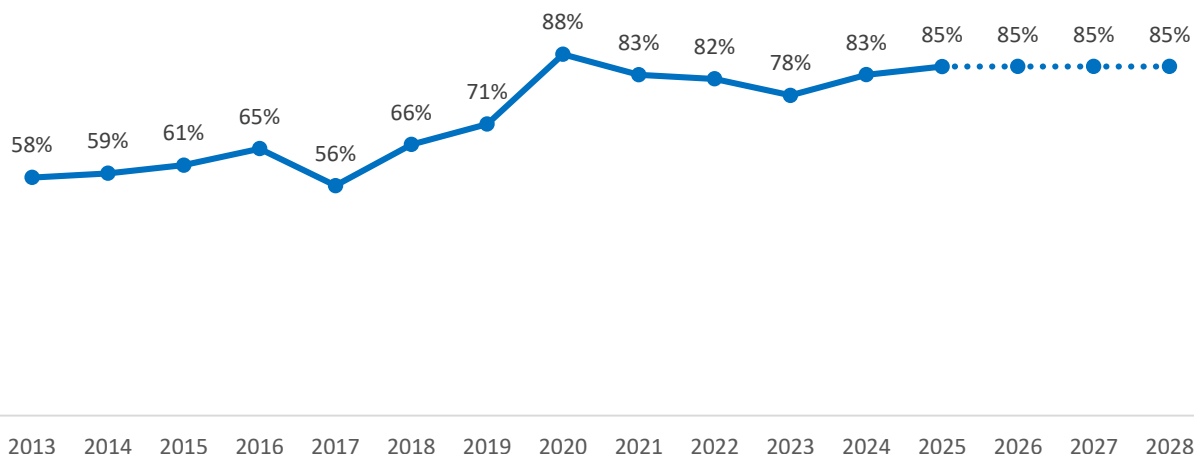


Figure 19. Forecasted values of the Social Tranquility Index

## Workplace Atmosphere

The psychological climate within a team affects work efficiency and serves as a key trigger for employee turnover.

There are no significant differences in perceived workplace atmosphere across employee categories or age groups.

According to the survey, employees perceive the company's climate as friendly (61%) and calm (29%). Only about 3% of staff highlight the presence of conflicts or tensions in labor relations.

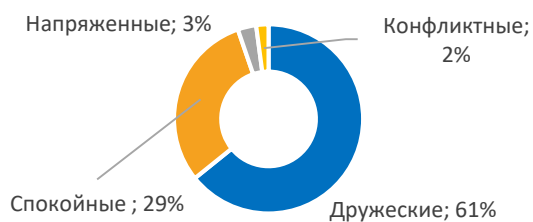


Figure 20. General team mood

Over 90% of employees across branches describe the atmosphere as positive (friendly and calm). 80% report no conflicts in the past year, and only 8% note conflicts, with 13% undecided. In «Port Kuryk», 33% report conflicts, and another 33% are undecided, indicating

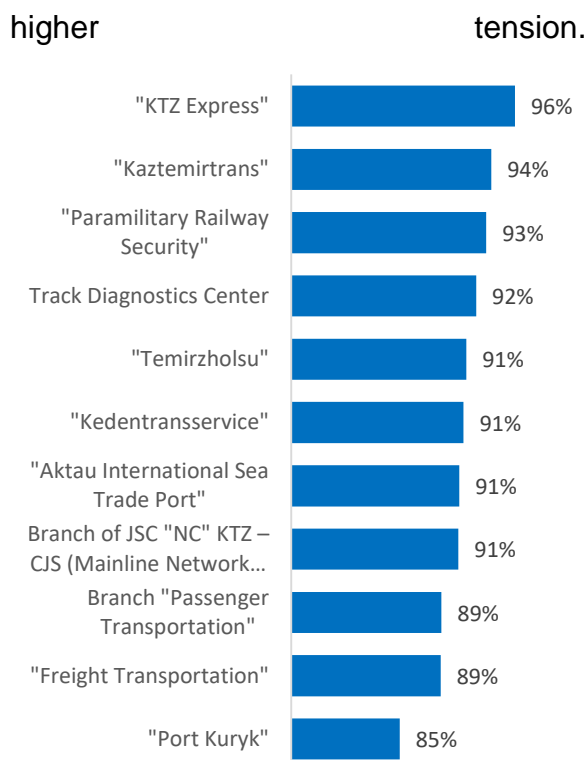


Figure 21. Friendly and calm workplace sentiments as a percentage of total staff

## Workplace Conflicts

The foundation of a team’s psychological climate is management’s ability to handle conflicts. Eight out of ten employees at “Kazakhstan Temir Zholy” reported that no conflicts occurred in the company over the past year. About 13% of staff were unsure how to answer this question. Only 8% of employees indicated the presence of any conflicts.

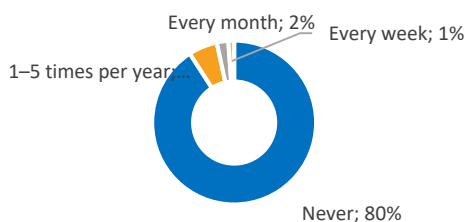


Figure 22. Frequency of workplace conflicts

The situation across the company’s branches is as follows: an analysis of engagement and social tranquility indicators within railway sector enterprises indicates a high level of

internal tranquility and a minimal level of conflicts in most organizations.

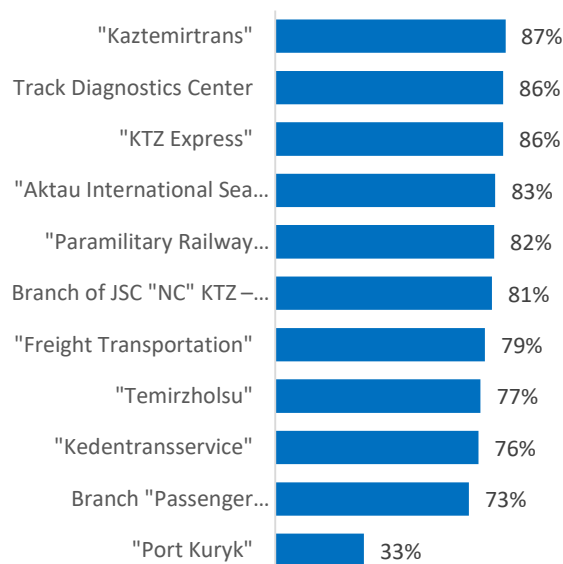


Figure 23. Share of employees reporting no workplace conflicts

Over 70% of employees in subsidiaries and affiliated organizations report no workplace conflicts. However, attention should be paid to the staff at “Port Kuryk” where one-third of employees report the presence of conflicts, and another third were unsure how to answer the question.

## Attitude Toward Protests

A protest is a form of collective employee action, expressed through a temporary cessation of work aimed at influencing the employer or government authorities to address specific labor, social, or economic demands. Within the company, 65% of employees view strikes negatively and disapprove of colleagues who choose this approach.

However, approximately 16% of employees express support for such actions. While this figure is relatively low at the company level, branch-level differences are notable. At “Temirzholsu,” 20% of employees openly support striking colleagues, and an additional 19% did not respond (potentially indicating latent support), meaning that roughly 40% of staff at this branch could be inclined to express dissatisfaction through strike or protest actions. The second-highest share of potential supporters is observed at the “Passenger Transportation” branch, where 18% of employees express support and another 20% were undecided.

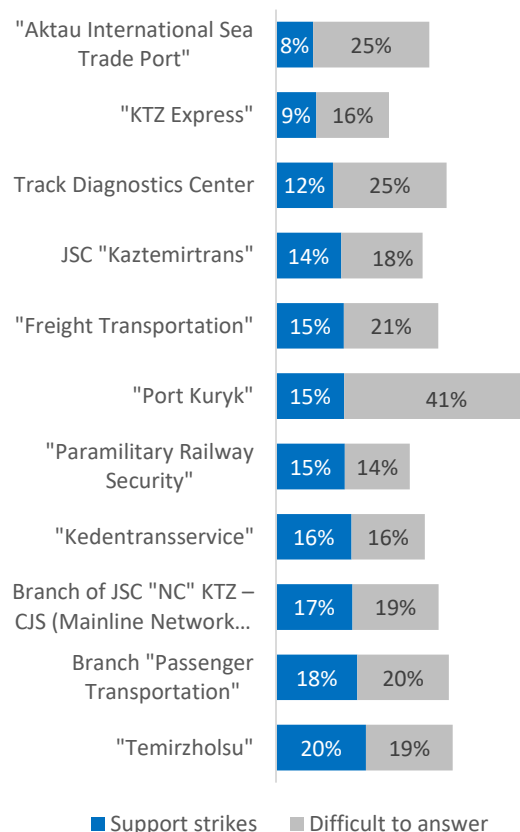


Figure 24. Share of employees who support colleagues using strikes to assert their interests

There is also a relatively high level of support for protest actions at “Port Kuryk” where 15% of employees express positive attitudes toward protests and 41% were undecided. Altogether, more than half of the staff could potentially support using protest actions as a means of addressing issues.

## Risk of employee dissatisfaction leading to demonstrations or protests

According to employee assessments, the overall likelihood of any employee-led demonstrations or protests is estimated at 5%, which is generally low. However, the data show significant variation across different subsidiaries. The tensest situations are observed at “Port Kuryk” (22%) and the “Passenger Transportation” branch (10%), indicating that these units require priority attention.

A high percentage in perceived likelihood of employee dissatisfaction may signal long-standing systemic management, organizational, or communication issues.

Low likelihood values (below 5%) are typical for all other subsidiaries and affiliated organizations. In three subsidiaries, employees almost

unanimously report the probability as close to zero.

Special attention should be given to “Port Kuryk,” where employee engagement significantly declined in 2025. Staff at this company report the presence of workplace conflicts, and 22% perceive a risk of employee demonstrations.

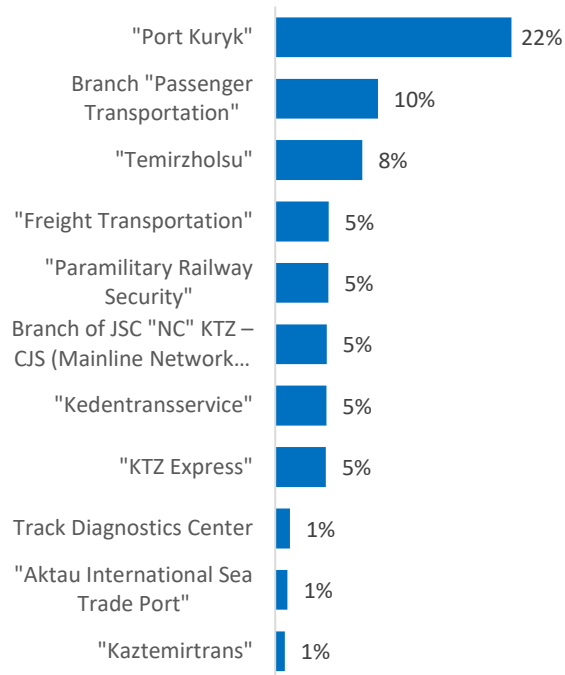


Figure 25. In your opinion, how likely are employee-led demonstrations or protests in your company in the near future?

## Protection of Labor Rights

The overall level of employee labor rights protection, according to the survey, stands at 80%. However, there is considerable variation across subsidiaries. Analysis within the transport and logistics sector shows a relatively high overall level, but with marked differences between individual organizations.

Leading positions in labor rights protection are held by «KTZ Express» (90%), «Kaztemirtrans» (86%), as well as «Temirzholsu» and «Paramilitary Railway Security» (both 85%). High scores indicate a well-established system for regulating labor relations, effective procedures for protecting employee rights, and trust in corporate policies.

Average levels of protection are observed at «Kedentransservice» (84%) and the Mainline Network Directorate (82%), reflecting a stable situation while leaving room for

improvement in feedback mechanisms and internal control.

Relatively lower scores are noted at «Aktau International Sea Trade Port» (80%), «Freight Transport» (79%), and the Track Diagnostics Center (78%), indicating partial issues related to access to rights protection or insufficient procedural transparency.

The most vulnerable groups are the Branch «Passenger Transportation» (72%) and, especially, «Port Kuryk» (59%). These results reflect systemic challenges, ranging from lack of trust in labor rights institutions to the absence of effective mechanisms for resolving conflicts.

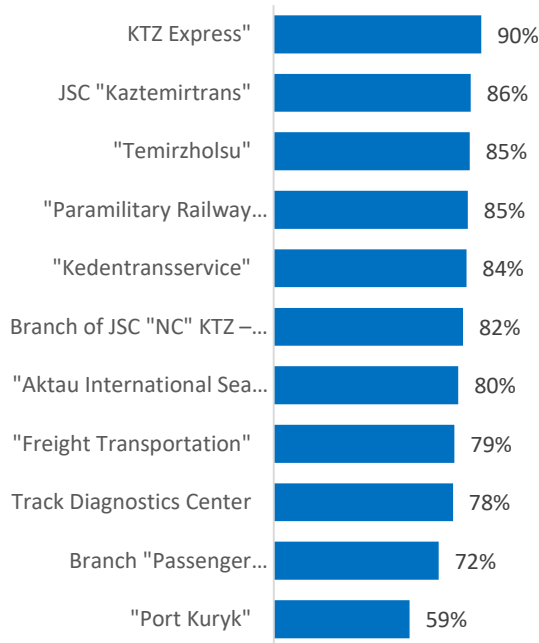


Figure 26. Level of perceived protection of labor rights

Thus, 50% of employees indicated they would turn to their immediate supervisor. Only 11% would approach the company’s top management. About 26% of employees can be considered nihilists, as this group either does not know how to respond or does not believe in the effectiveness of existing channels for addressing issues. In an unfavorable environment, this category may take irrational measures to protect their rights, highlighting the importance of preventive interventions. A very small proportion of employees believe that the ombudsman (1%) or the trade union (5%) could help. Almost no employees consider a protest

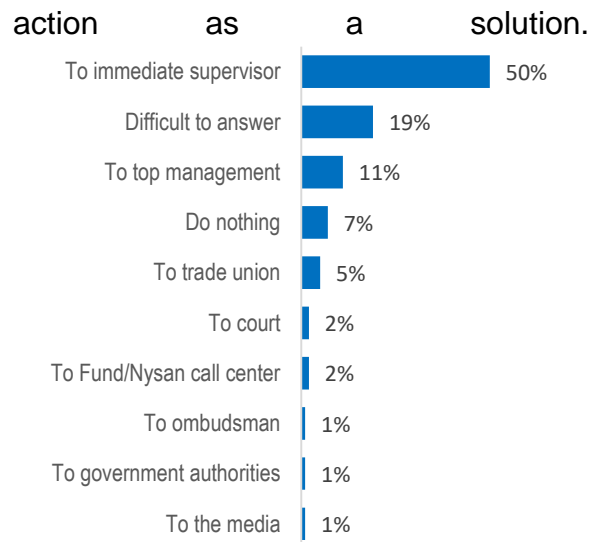


Figure 27. What actions will an employee take if their labor rights are violated?

According to employee assessments, only 42% of staff are aware of the presence of an ombudsman in the company, which is a relatively low figure.

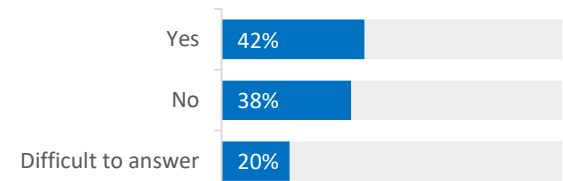


Figure 28. Are employees aware that the company has an ombudsman?

Across branches, the highest level of awareness about the ombudsman is observed at “Kaztemirtrans,” where nearly all employees know about the presence of an ombudsman. In most other subsidiaries and affiliated organizations, employees are largely uninformed about the existence of an ombudsman in their company. The lowest awareness is recorded among employees at “Port Kuryk” (26%),

“Aktau International Sea Trade Port” (33%), and the Track Diagnostics Center (34%).

Among those aware of the ombudsman, almost all believe that the presence of an ombudsman encourages the employer to pay greater attention to labor rights.

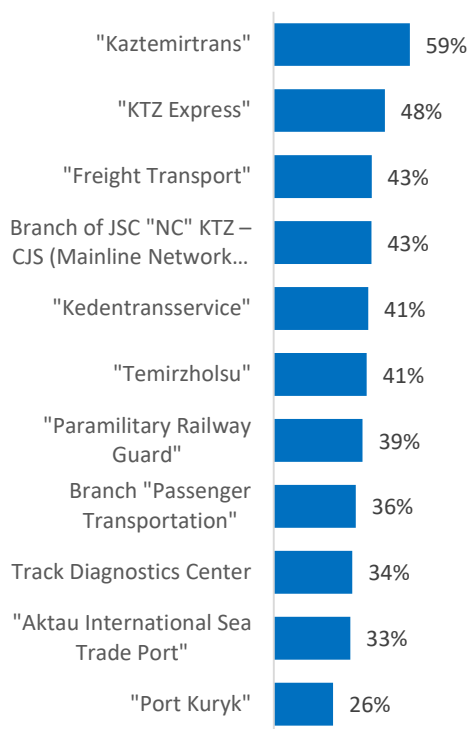


Figure 29. Awareness of the ombudsman

## Section Conclusions

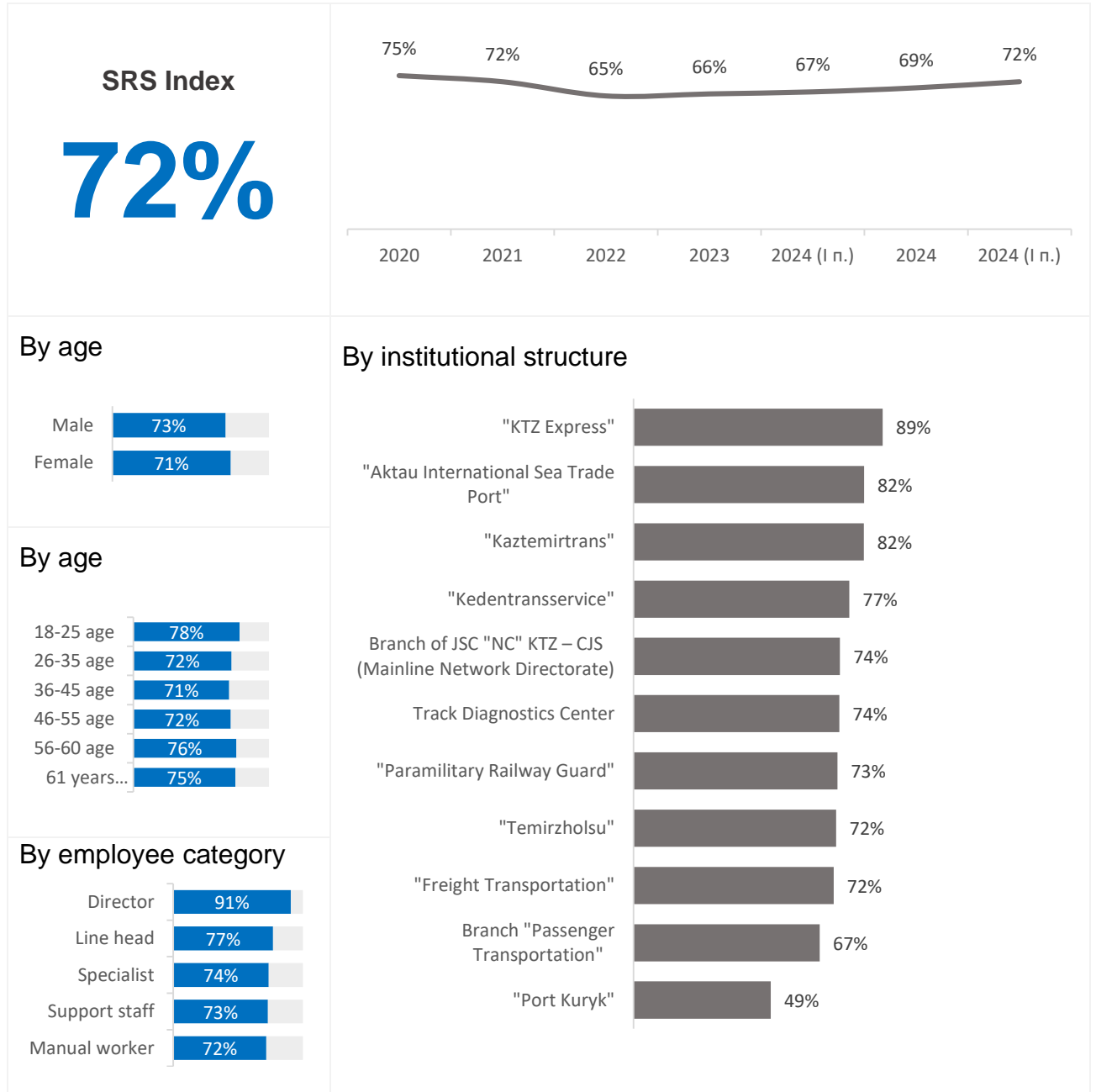
- The Social Tranquility Index is 85%, indicating a stable environment, but some subsidiaries show tension, particularly «Port Kuryk» (61%), where conflicts are noted, and 22% see potential for protests.
- The psychological climate is positive: 9 out of 10 describe it as friendly and calm, with 80% reporting no conflicts in the past year.
- 65% oppose protests, but higher support exists in «Passenger Transportation» Branch (18% support, 20% undecided) and «Port Kuryk» (15% support, 41% undecided).
- Protest likelihood is low (5%), but higher in «Port Kuryk» (22%) and «Passenger Transportation» Branch (10%).
- 80% feel their labor rights are protected, but lower levels are in «Passenger Transportation» Branch (72%) and «Port Kuryk» (59%).
- Only 42% are aware of the ombudsman, with the lowest awareness in «Port Kuryk» (26%), «Aktau International Sea Trade Port» (33%), and Track Diagnostics Center (34%).

## SRS Index

The SRS Index for the first half of 2025 reached 72%, showing an increase of 3 percentage points compared to the previous period.

Gender analysis indicated that men, on average, demonstrate a slightly higher index level (73%) than women (71%). The most favorable results are observed

in the 18–25 age group, where the index reaches 78%. Conversely, the lowest values are recorded among employees aged 36–45, which may reflect age-related differences in the perception of working conditions and overall workplace sentiment.



The distribution of the index across subsidiaries shows significant variability, indicating differences in employee satisfaction and social climate among the company's affiliated organizations.

The lowest index value is recorded at "Port Kuryk" (49%). In the vast

majority of subsidiaries, the index exceeds 70%.

The highest results are observed at «KTZ Express,» «Aktau International Sea Trade Port,» and «Kaztemirtrans.»

## Employee Voice

As part of the survey, employees shared their suggestions and comments regarding working conditions. Analysis of the open-ended responses revealed key problem areas, grouped into five categories: facilities, materials and equipment, HR issues, fairness and occupational safety, and compensation and social package (including workwear).

### 1. Facilities

The most frequently mentioned complaints relate to inadequate sanitary and domestic conditions. Employees report the absence or poor state of toilets, showers, water supply, and sewage systems. Complaints also include the lack of equipped break rooms, refrigerators, microwaves, and furniture. Additionally, buildings and premises require maintenance, and heating and ventilation systems fail to provide comfortable temperatures (cold in winter, excessive heat in summer).

### 2. Materials and Equipment

Employees consistently raise concerns about technical resources. Existing equipment and machinery are considered outdated (cranes, locomotives, office equipment, computers, printers, radios). There is a shortage of spare parts, tools, and consumables. Staff often have to pay for office supplies and cartridge refills themselves. In some cases, there is a lack of modern safety measures (cameras, lighting, communication tools).

### 3. HR Issues

A significant portion of complaints relates to personnel matters. Employees point to chronic understaffing, requiring them to cover multiple roles. Some managers are deemed unfit for their positions, with reports of rude behavior and poor communication culture. Issues of corruption, non-transparent appointments, and "tribalism" are mentioned. The HR department is criticized for a formal approach and insufficient communication regarding social package.

### 4. Fairness and Occupational Safety

Employees report numerous labor law violations. Common complaints concern unpaid overtime, with actual working hours exceeding norms (14–24 hours instead of 12). Violations in payroll calculation and benefits, as well as refusal to provide relevant documents, are noted. Some responses call for external audits and involvement of independent bodies to protect employee rights.

### 5. Compensation, Social package, and Workwear

Most complaints focus on salaries and social package. Employees request increases to base pay, note irregular and unfair bonuses, lack of compensation for overtime and multiple roles. Separate complaints concern poor-quality workwear and footwear, which are seasonally inappropriate, wear out quickly, and fail to ensure comfort and safety. Dissatisfaction is also expressed

regarding the social package package:  
infrequent provision of sanatorium  
vouchers, no compensation for transport  
or meals, and insufficient coverage by  
social support measures.

## Recommendations

Based on many years of experience and long-term monitoring of employee sentiment, the first priority should be to hold meetings with staff to present the results of the survey. Participation in the survey required time, emotional effort, and active engagement in improving working conditions. Lack of follow-up communication may be perceived as ignoring their contribution, increasing the risk of burnout and reducing employee engagement.

Based on the collected data, the following management measures are recommended:

- It is recommended to conduct an in-depth analysis of the causes of low engagement at «Port Kuryk».
- Systematic Program for Improving Working Conditions
- Annually select one priority area for improvement (nutrition, housing, transportation, equipment, health, etc.) and implement a comprehensive set of measures.
- Example: 2026 — Nutrition. Measures: quality and service audit, “mystery shopper,” targeted surveys, menu expansion (e.g., Fish Thursday, national cuisines), increase vegetables and fruits in the diet, healthy eating lectures.
- Establish a routine of regular surveys and feedback to assess results.

### 2. Development of Workplace Facilities

Include in the capital investment plan measures for the repair, reconstruction, and construction of workplace facilities.

Priority measures:

- Showers, laundries, and rest rooms at production sites;

- Installation of air conditioning, ventilation, and heating systems;
- Replacement of outdated furniture and household appliances;
- Development of shift camp infrastructure;
- Unified standards for employee accommodation.

Create employee committees to monitor the quality of food and facilities at shift sites.

Conduct an audit of facilities and allocate a modernization budget per employee.

Assign responsibility for timelines and quality control to the directorates and the corporate personnel support service.

### 3. Household Infrastructure Development

- Include repairs, reconstruction, and construction of household facilities in capital investment plans, prioritizing:
  - Showers, laundries, and rest rooms at production sites.
  - Air conditioning, ventilation, and heating systems.
  - Replacement of outdated furniture and appliances.
  - Development of shift camp infrastructure.
  - Uniform accommodation standards.
  - Form employee commissions to monitor food and living conditions quality. Conduct audits of household facilities and allocate budgets based on per-employee standards. Assign oversight to directorates and corporate support services.

### 4. Safety Culture and Occupational Health

- Conduct a study of the company’s safety culture and develop targeted measures.
  - Implement practices such as safety quests, simulations, and emergency response training.
  - Strengthen leadership in safety: assign responsible officers, conduct “safety minutes” before shifts, and involve line managers in incident analyses.
  - Introduce digital tracking of violations and suggestions, monthly analytics, and rewards for top initiatives.
  - Test new personal protective equipment (PPE) considering climate and production specifics.
  - Appoint safety ambassadors in units — employees promoting a “zero-incident” culture.
5. Compensation and HR System
- Conduct a review of the compensation system considering regional differences, working conditions, and employee tenure.
  - Reassess coefficients for work on weekends and public holidays.
  - Ensure the bonus system is transparent and tied to KPIs.
  - Introduce incentives for innovation, mentorship, and training.
  - Implement individual development plans and expand learning opportunities.
  - Launch a digital platform for recognizing achievements and automating HR processes.
  - Reevaluate the “3-to-2” program.
- Analyze staffing sufficiency in “Freight Transport”.
  - Conduct audits in branches where employees report corruption: Akmola branch of “Freight Transport”, Zhambyl branch of “Freight Transport”, Kostanay branch of “Freight Transport”, Semey branch of “Freight Transport”, Almaty branch of “Mainline Directorate”, Zhambyl branch of “Mainline Directorate”, Kostanay branch of “Mainline Directorate”, Shymkent branch of “Mainline Directorate”, “Wagonservice”, Pavlodar site of RF “Severnaya”, Almaty site of Branch “Express”.
6. Social package and Workwear
- Involve employees in selecting and testing workwear and footwear.
  - Consider gender, age, and sizes in centralized procurement.
  - Establish continuous feedback on the quality of PPE supplies.
  - Include dental and preventive services in voluntary health insurance (VHI).
  - Develop programs for sanatorium and wellness trips, as well as partial compensation for travel and vacations.
  - Ensure workwear is provided according to the season and meets safety standards.
  - Develop an app to display in the employee’s personal account: assigned PPE, employee sizes, date of last replacement/receipt, stock balance, access to social benefits, etc.

## About the Study

The Samruk Research Services (SRS) study, conducted since 2013, is known as the Social Tranquility Index (Rating). It aims to assess social tranquility in the labor collectives of «Samruk-Kazyna» group companies.

### Tools and Methodology

SRS is a monitoring tool designed to measure social tranquility in labor collectives. The methodology outlines principles and methods for assessing tranquility. The SRS Index calculates social tranquility levels, with results and recommendations serving as diagnostic and advisory tools for informed decision-making by the Fund and stakeholders.

### Application of Results

The data can be used by the Center for Social Partnership and Analysis to implement proactive measures for social tranquility, such as improving work conditions and employee well-being through regular sentiment monitoring. The index provides a foundation for in-depth analysis and corrective actions.

### Methodology Development

The current SRS methodology is an updated version, adapted to social changes in Kazakhstan and expanded research by the Center. It emphasizes remote data collection due to the pandemic, introduces new approaches to defining social tranquility, revises questions, and updates index calculation methods.

### Future Prospects

The methodology may be revised or supplemented with Fund and Center expert approval to remain relevant and responsive to current needs.

### Study Objectives

The study aims to diagnose and analyze social tranquility in labor collectives using the methodology and additional data sources, including internal regulations, IR-screening data, «Nysana» system appeals, annual plans, semi-annual execution reports, and open-source data.

### Study Tasks

The SRS study monitors social tranquility by evaluating:

Employee Engagement Index: Satisfaction with infrastructure, workload, safety, social package, loyalty (eNPS), development opportunities, salary fairness, and communications.

Social Well-being Index: Well-being dynamics, health, financial well-being, and community participation.

Social Tranquility Index: Social climate, labor rights protection, conflict levels, attitudes toward protests, and protest likelihood.

## Employee Characteristics

A total of 20,355 employees participated in the study, representing 20% of the company's total workforce (100,177 employees). The sample is representative and reflects key employee characteristics, including age, gender,

professional categories, and the company's institutional structure. The gender distribution shows a significant predominance of men: 74% of respondents are male, while 26% are female.

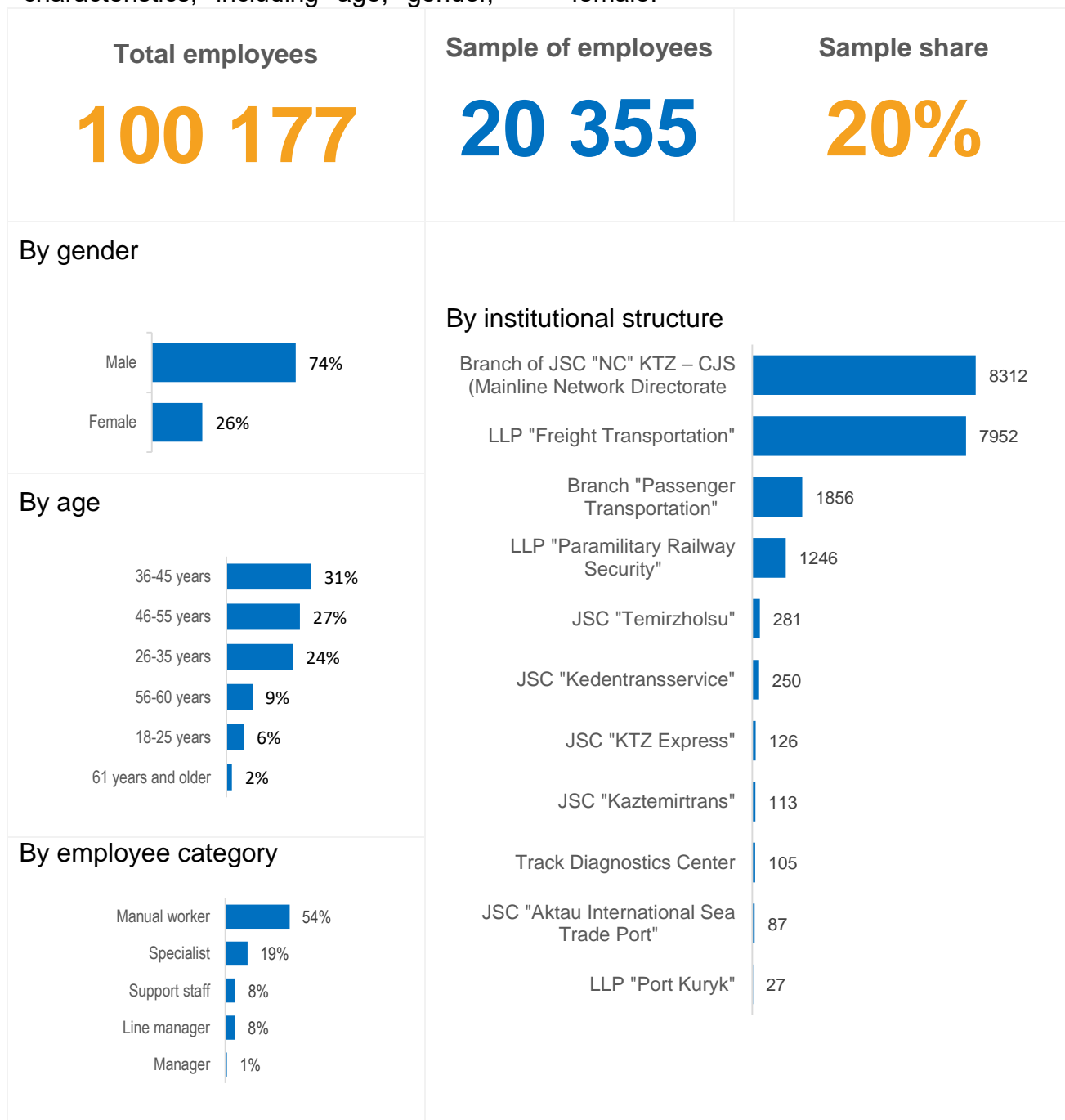
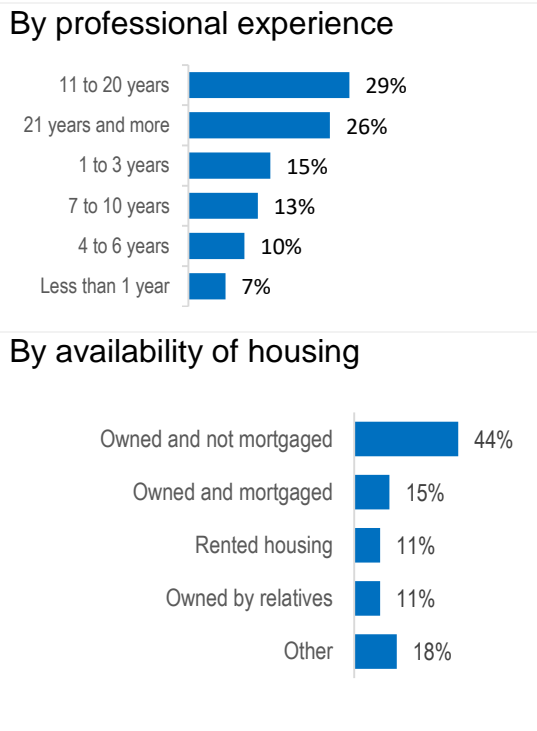


Figure 30. Research Sample

The vast majority of employees are in the active phase of their professional life: age groups 26–55 account for over 80% of respondents. This indicates a high level of professional experience and tranquility within the workforce. Additionally, 55% of employees have more than 10 years of tenure with the company, reflecting strong engagement and loyalty.

at increasing employee engagement, satisfaction, and overall workforce tranquility.

In terms of professional composition, the largest share is represented by manual workers (54%) and specialists (19%), while support staff account for 8%. This structure highlights a strong production base, while also indicating the need for systematic efforts to develop managerial competencies and enhance employee qualifications.



Employee housing conditions also remain an important social factor. About 60% of employees own their housing, though 15% have mortgaged properties, and another 11% rent. This increases the sensitivity of part of the workforce to financial and social risks.

This data allows for a more precise understanding of the current situation within the workforce and can be used to develop socially oriented solutions aimed

*Situational Overview: Recommendations for Key Problem Areas*

	«Aktau International Sea Trade Port»	«Kedentransservice»	«Kaztemirtrans»	«Temirzholsu»	«KTZ Express»	«Paramilitary Railway Security»	«Freight Transportation»	«Port Kuryk»	Branch «Passenger Transportation»	Mainline Network Directorate	Track Diagnostics Center
Are you provided with the necessary materials and equipment to perform your work effectively? (e.g., tools, machinery, PPE, etc.)	86%	91%	89%	93%	93%	87%	84%	70%	85%	83%	96%
Do you have the necessary facilities for comfortable work? (e.g., conditions in the canteen, break room, locker room, shower, restroom, etc.)	89%	74%	82%	79%	84%	84%	77%	59%	71%	78%	52%
Are you satisfied with your workload? (e.g., balance between work volume and deadlines)	97%	92%	94%	91%	95%	90%	84%	89%	86%	87%	93%
Do you have opportunities for professional and career growth within the company?	71%	76%	74%	71%	86%	76%	77%	63%	69%	80%	74%

Have you experienced moral or psychological pressure from management this year (direct or higher-level)?	94%	95%	93%	93%	94%	94%	92%	89%	90%	92%	96%
Does your employer take sufficient measures to ensure workplace safety? (e.g., protection in hazardous areas, training, instructing staff, etc.)	95%	97%	96%	94%	98%	97%	95%	85%	93%	95%	99%
Are you satisfied with the company-provided social package? (e.g., health insurance, social benefits, and compensations)	79%	89%	88%	84%	96%	85%	82%	41%	79%	84%	84%
Do you believe that promotions in your company are based on qualifications?	82%	81%	77%	81%	93%	82%	80%	56%	76%	83%	83%
Do you consider your salary fair in relation to the work you perform?	75%	68%	68%	65%	79%	52%	56%	52%	55%	64%	56%
Do you clearly understand the tasks and expected results in your role?	98%	96%	99%	95%	98%	96%	96%	96%	94%	96%	94%
Would you recommend the company to your friends and acquaintances as a good place to work?	93%	88%	86%	80%	97%	79%	79%	63%	75%	79%	78%
Is your professional opinion considered when collective decisions are made or when decisions are made by your immediate supervisor?	85%	87%	90%	84%	96%	86%	80%	81%	76%	85%	87%