

# Measuring Climate Action Through People's Eyes: Evidence from Kazakhstan's Energy Transition

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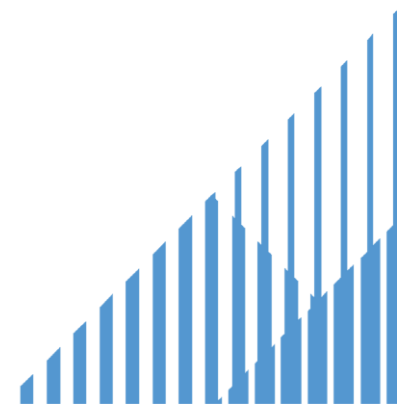
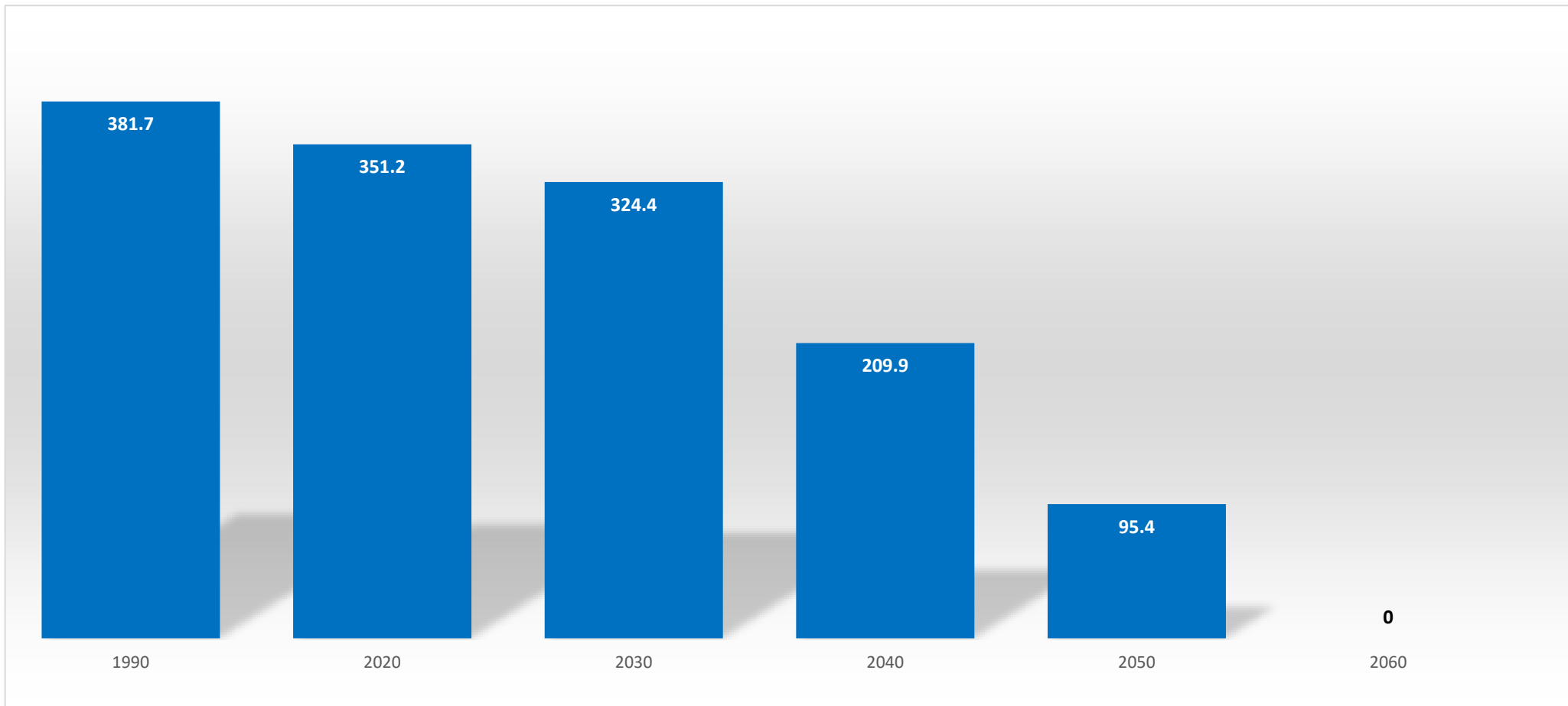
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**FOR ACHIEVING CARBON NEUTRALITY IN  
THE REPUBLIC OF KAZAKHSTAN UNTIL 2060  
(ISSUED ON FEBRUARY 2, 2023)**

## STATED GOALS:

**National net GHG emissions, million tons of CO2-eq.**

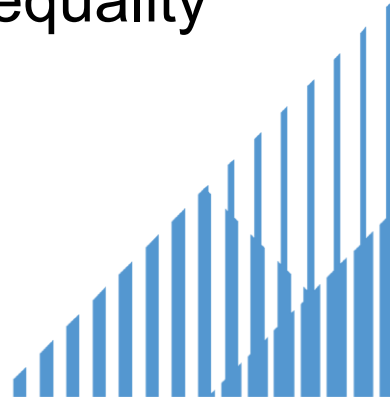


# IMPACT

Kazakhstan's decarbonisation strategy aims to reduce carbon emissions and resource extraction while ensuring social equity.

**Ekibastuz** is the centre of coal extraction, providing thermal and energy supply to the country, yet it has outdated and ineffective coal-based heating infrastructure.

**Janaozen**, an oil and gas extraction site and a critical node in the country's gasification efforts, has experienced social protests over wage inequality and rising gas prices.



# The study objective



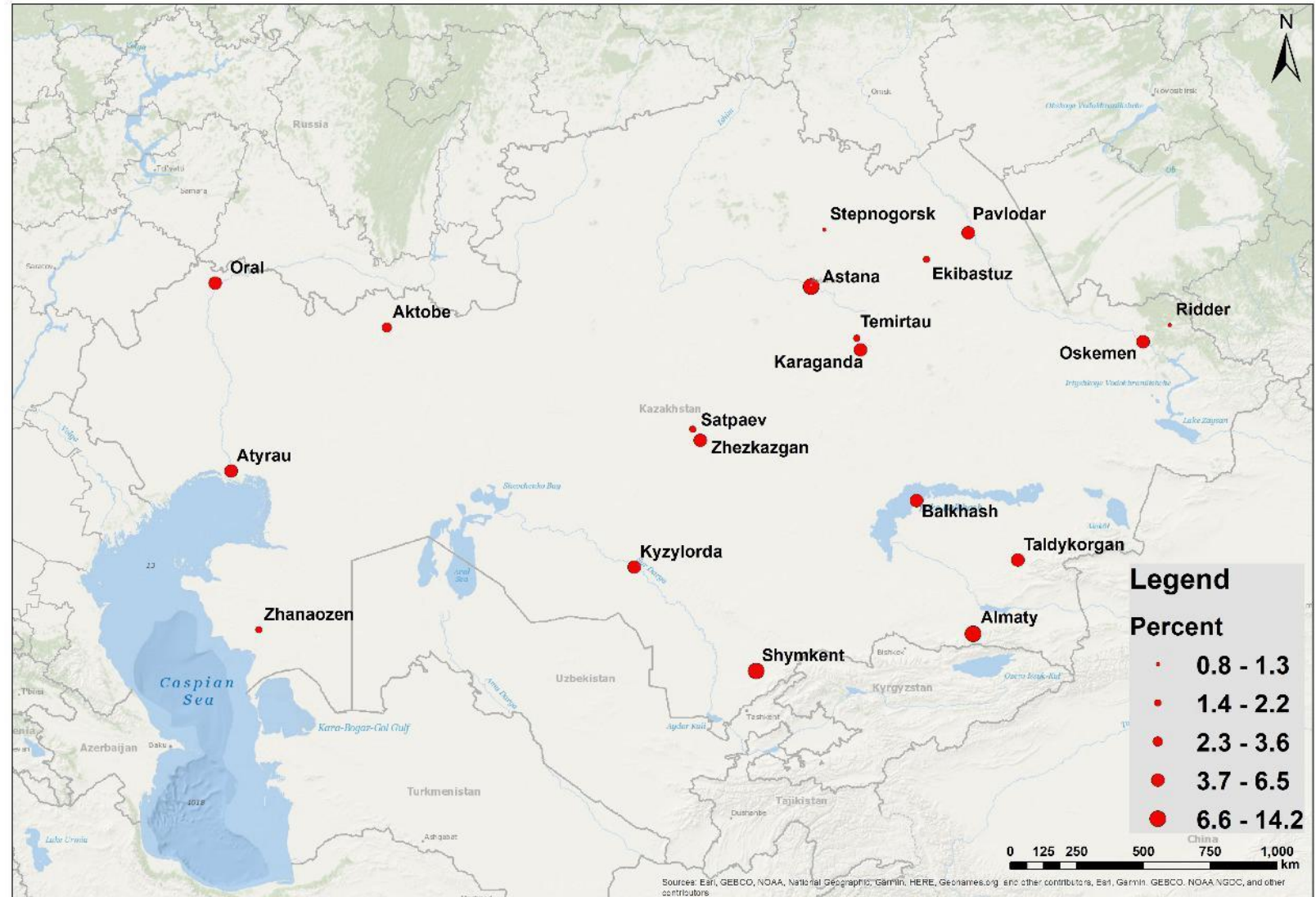
The study aims to capture critical public perspectives, mainly focusing on how cities, including mining towns, and diverse demographic groups, perceive the ongoing energy transition and the prospects for sustainable economic growth in Kazakhstan.

# Methodology

**1,014** Kazakh citizens were involved in a nationwide phone survey held in February-March 2025 using the CATI method.

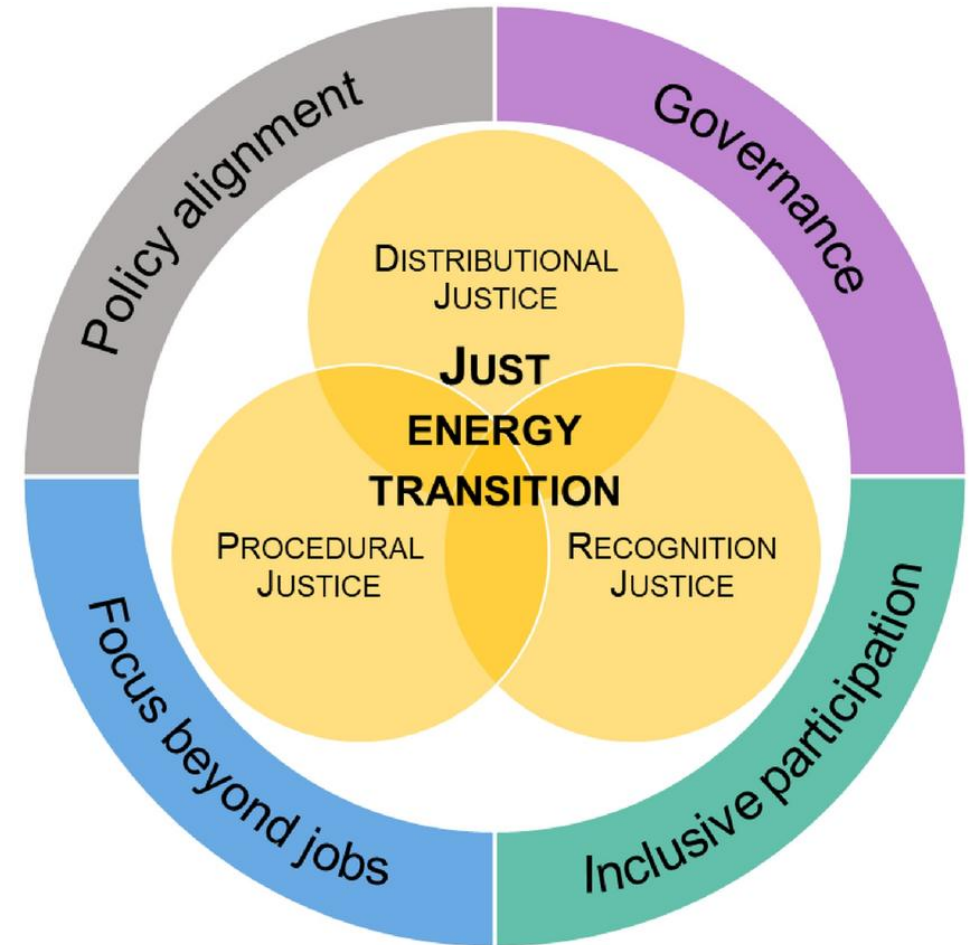
Balanced gender ratio (50/50) and representative demographics.

**19** Urban areas are clustered into 5 categories based on economic structure



# Just Transition

“The concept of a ‘just transition’ encompasses a political imperative, a policy goal, and a set of practices meant to minimize the harmful impacts of industrial and economic transitions on workers, communities, and society at large.”  
(Krawchenko & Gordon, 2021, p. 1)



Source: Sharma et al. (2023)

# Just Transition

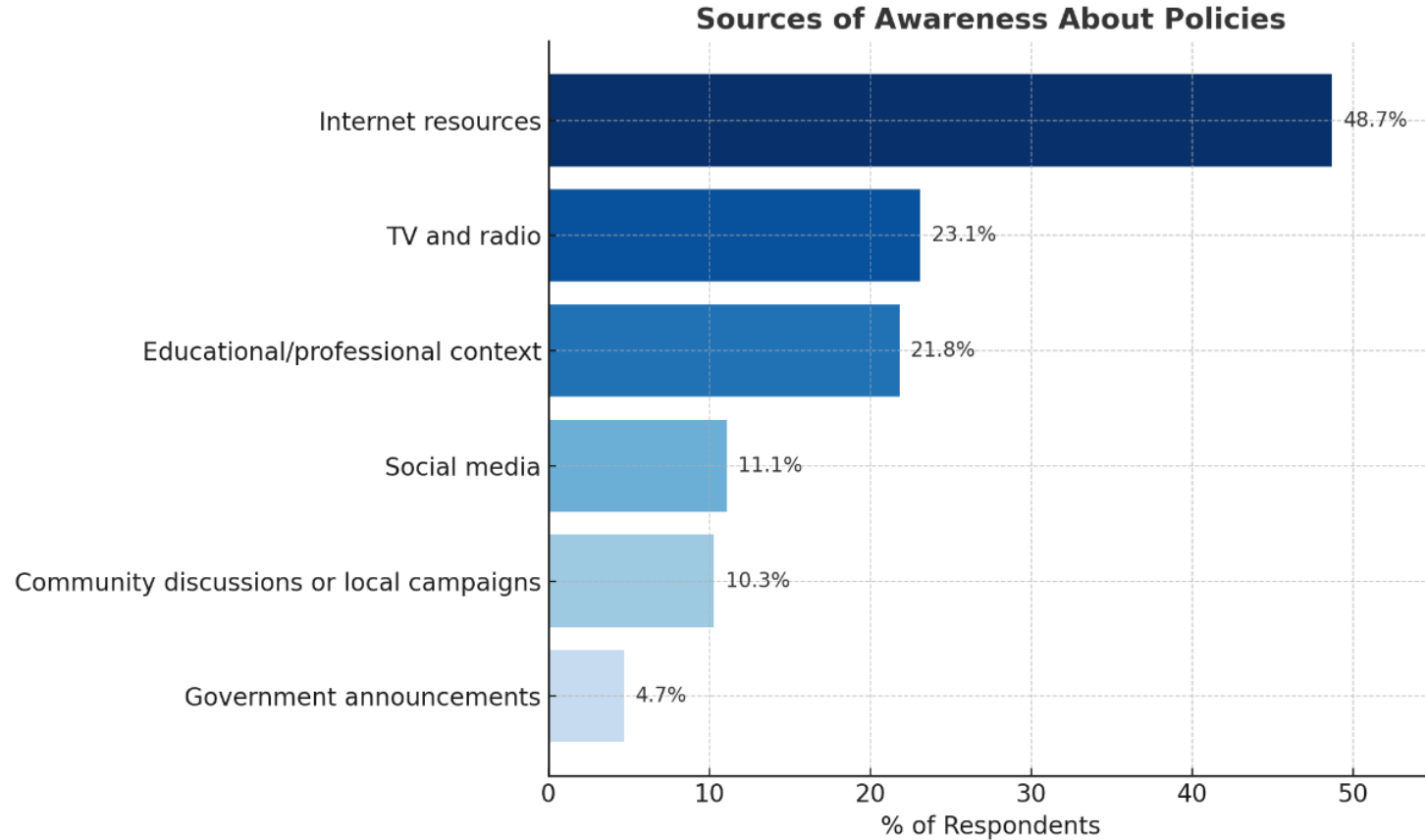
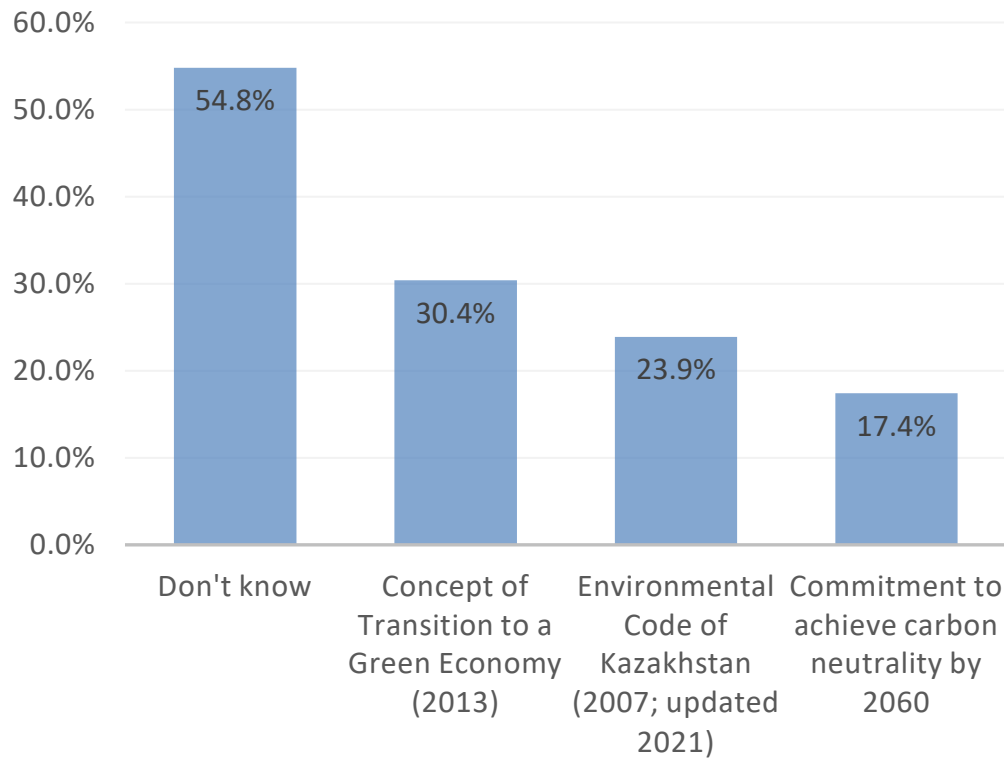
# JUST TRANSITION



Group of Experts on Coal Mine Methane and Just Transition



# Public awareness



54.8% lack awareness of Kazakhstan's main energy transition policies.

Nearly half of respondents (48.7%) learned about policies through internet resources, followed by traditional media (23.1%) and educational contexts (21.8%).

92.3% of respondents are aware of the impacts of climate change.

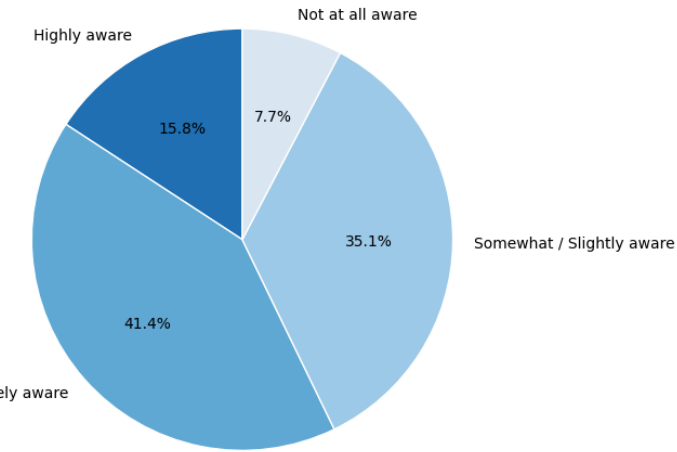
'High' aware individuals are most concentrated among:

Men, who report higher awareness (10.0%) than women (5.8%).

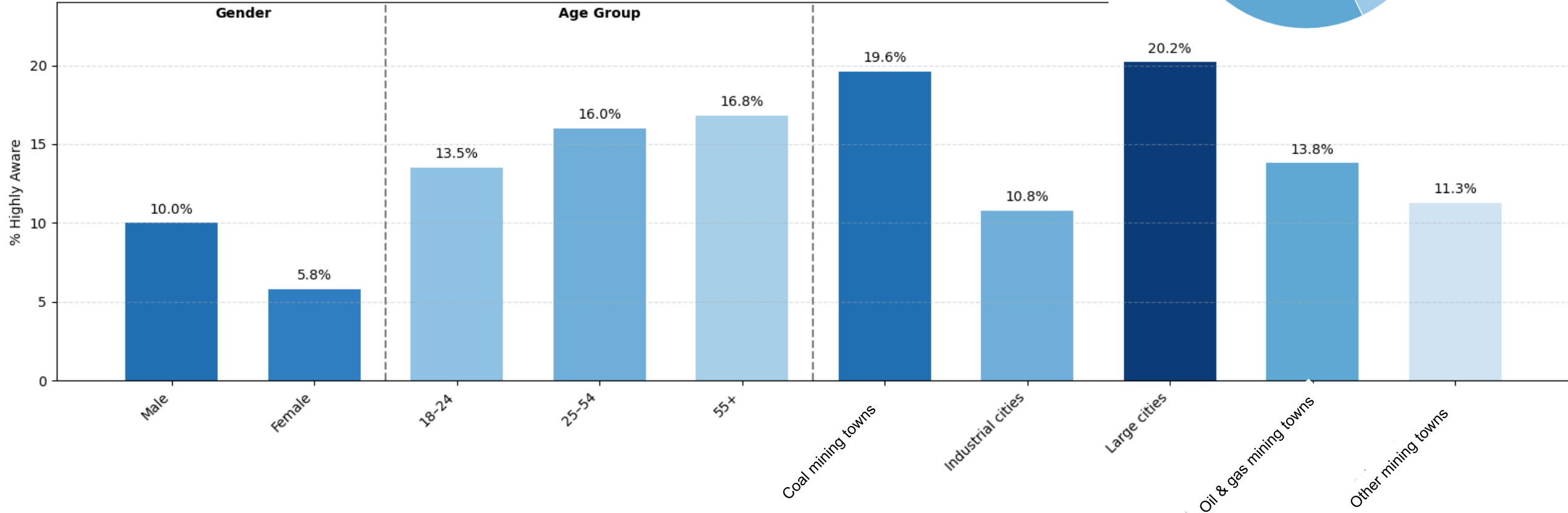
Older respondents, with awareness rising from 13.5% (18–24) to 16.8% (55+).

Large cities, which show the highest within-group awareness (20.2%), closely followed by coal towns (19.6%).

Distribution of Climate Awareness Levels (Percent of Respondents)



"Highly Aware" of Climate Change Impact (by Gender, Age Group, and City Type)



**68.7%** believe decarbonisation will positively impact their lives.

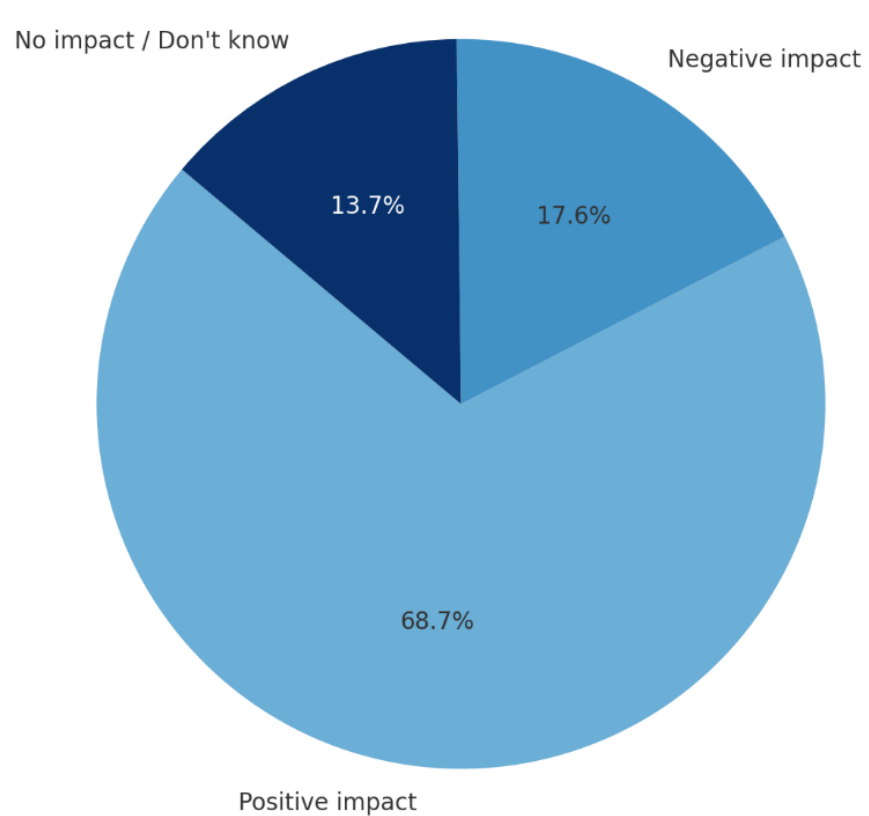
**80.3%** expect improvements in air quality and public health.

Among the **17.6%** of respondents who perceive the energy transition negatively.

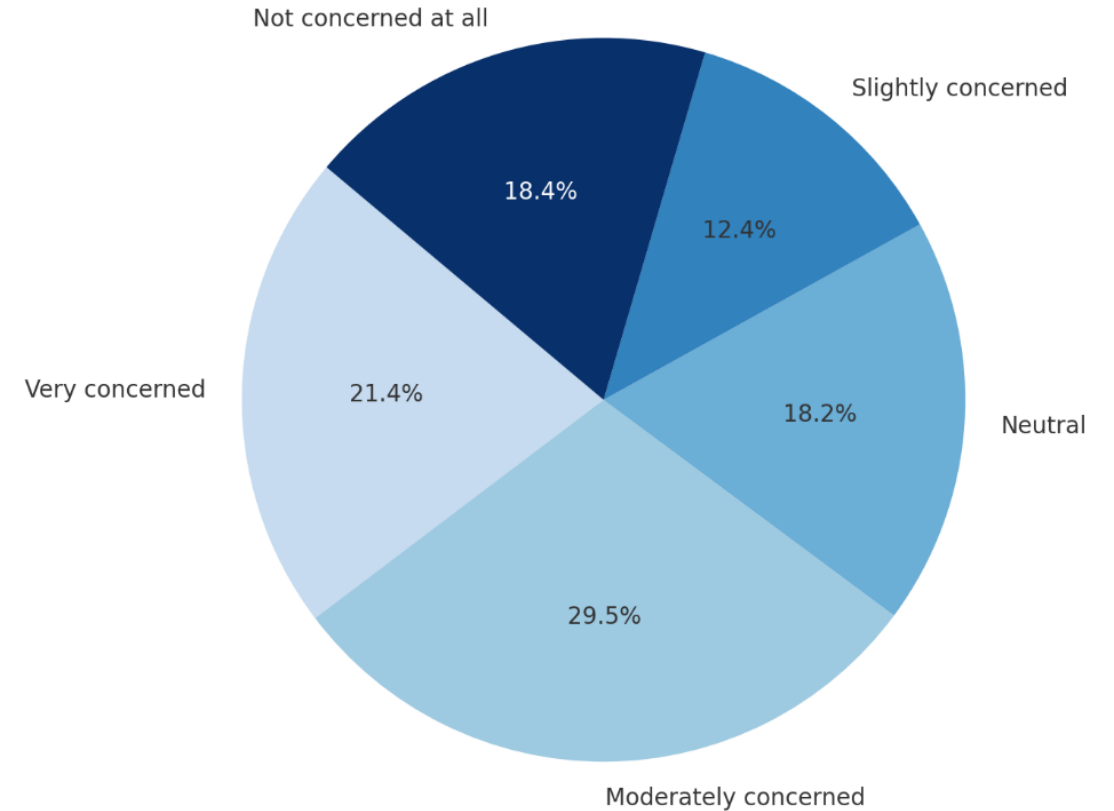
Job losses in the fossil-fuel sector and unemployment account for **45%** of cited reasons.

**63.4%** fear job losses, especially working-age respondents in coal towns.

### Public Opinion on Impact of Fossil Fuel Phase-Out



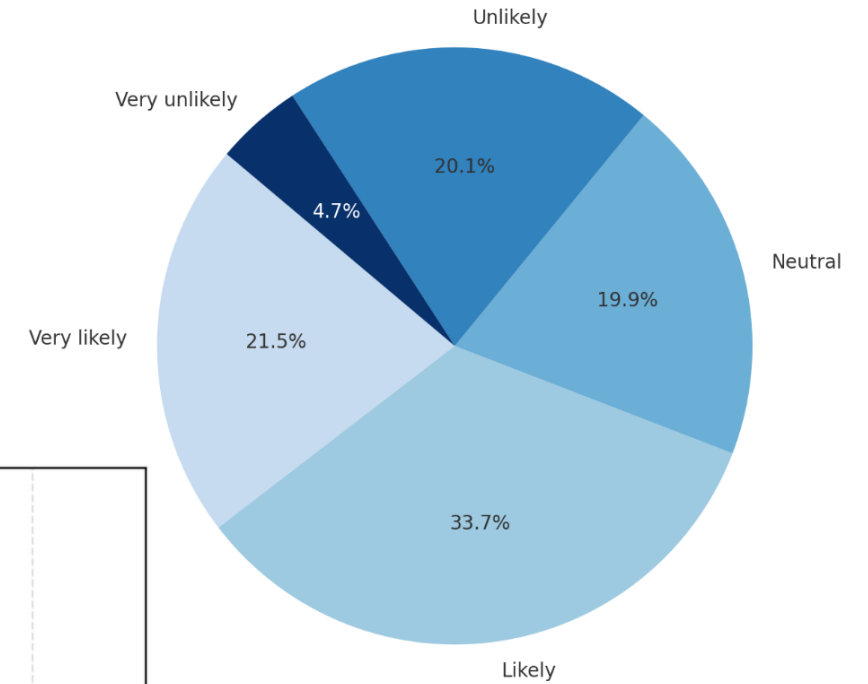
### Concern About Job Loss Due to Fossil Fuel Phase-Out



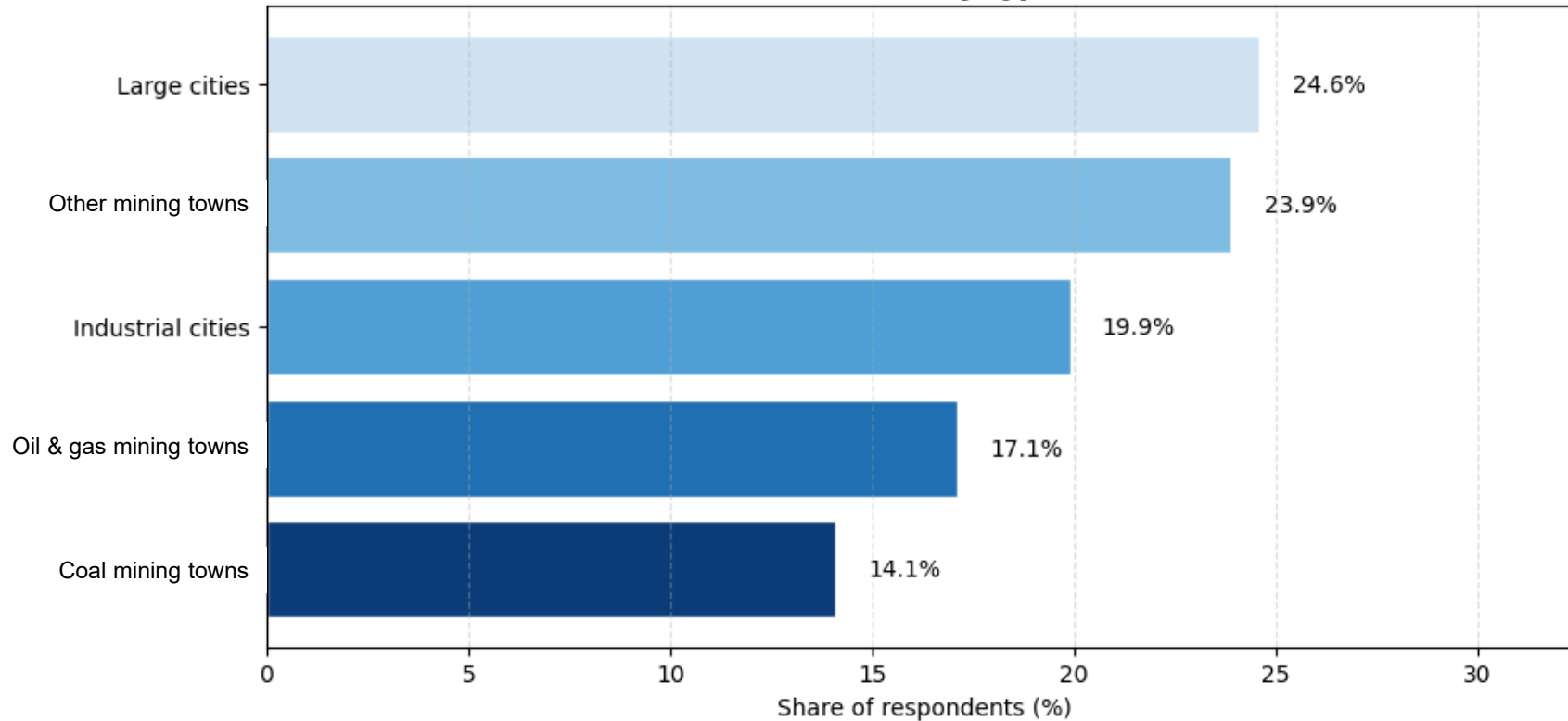
55.2% overall believe new jobs may emerge due to the energy transition.

This belief is significantly lower in coal towns (14.1%).

### Perceived Likelihood of Energy Transition Creating New Jobs

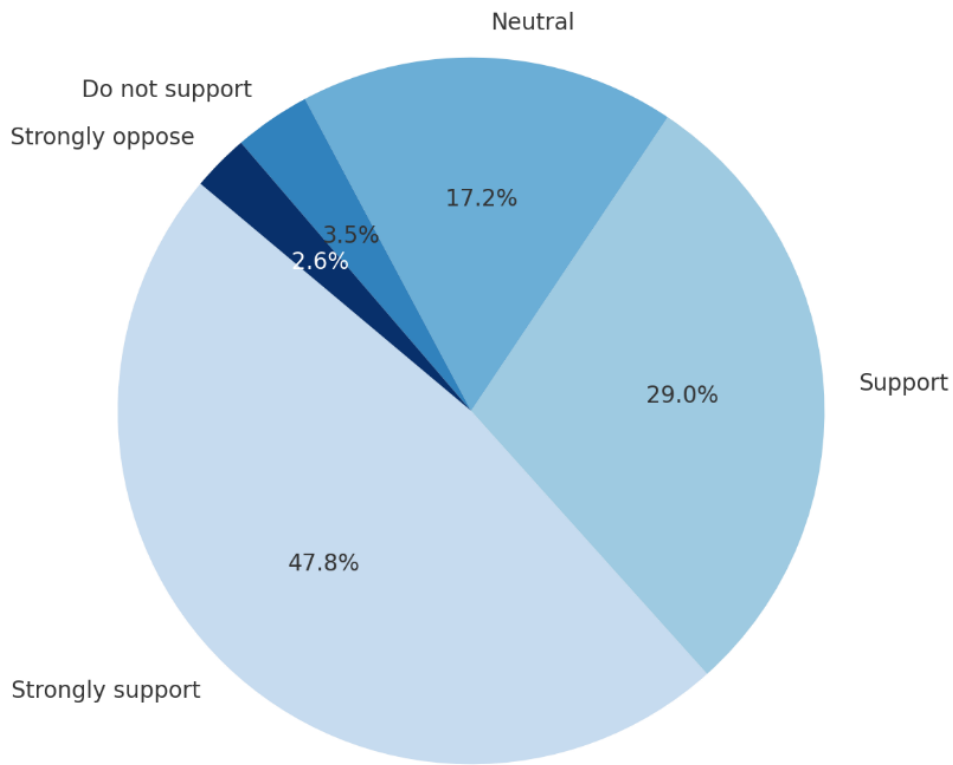


(% within city types)



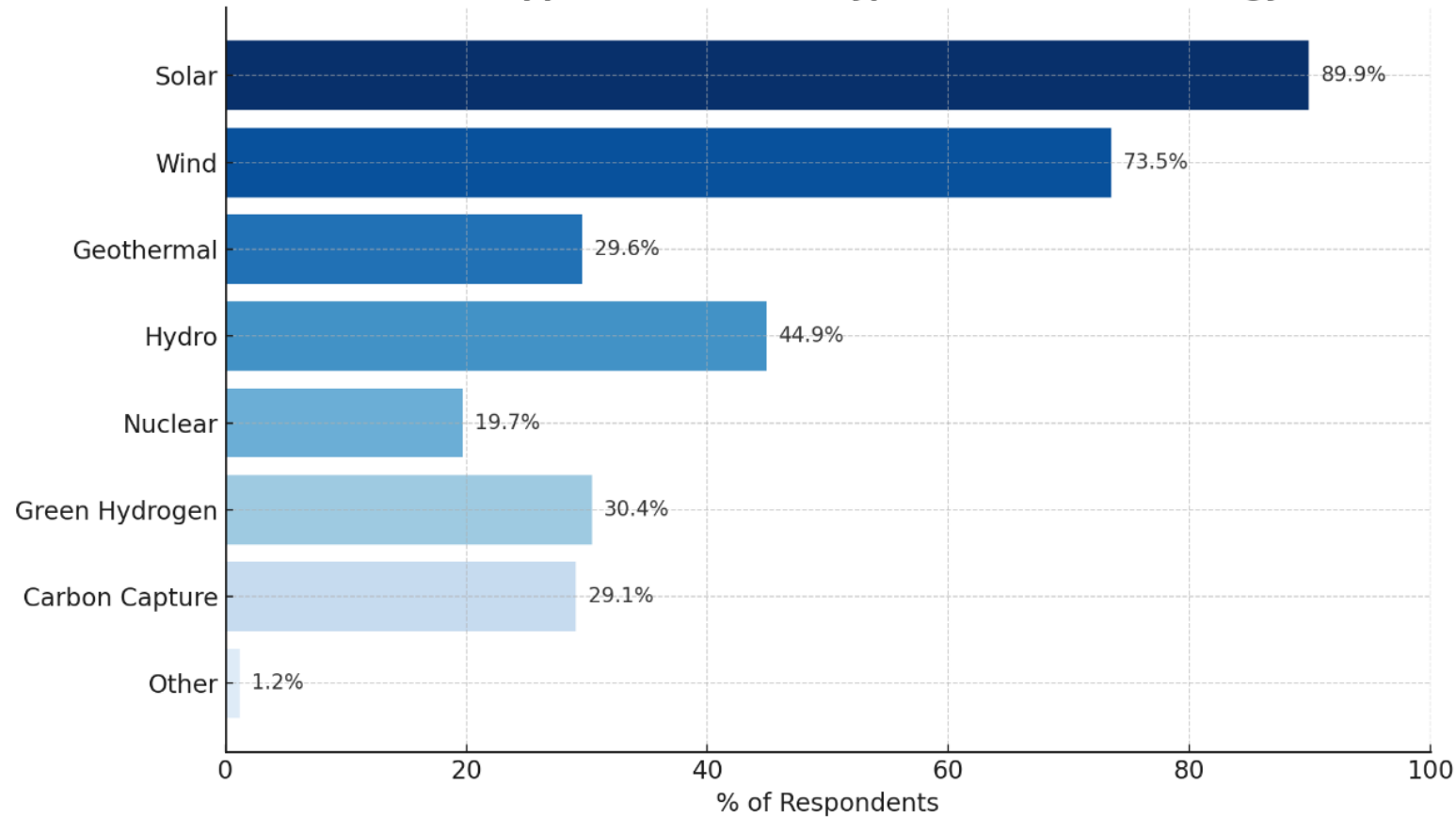
# Support for renewable energy

## Public Support for Renewable Energy Development



**76.8%** of respondents support renewable energy

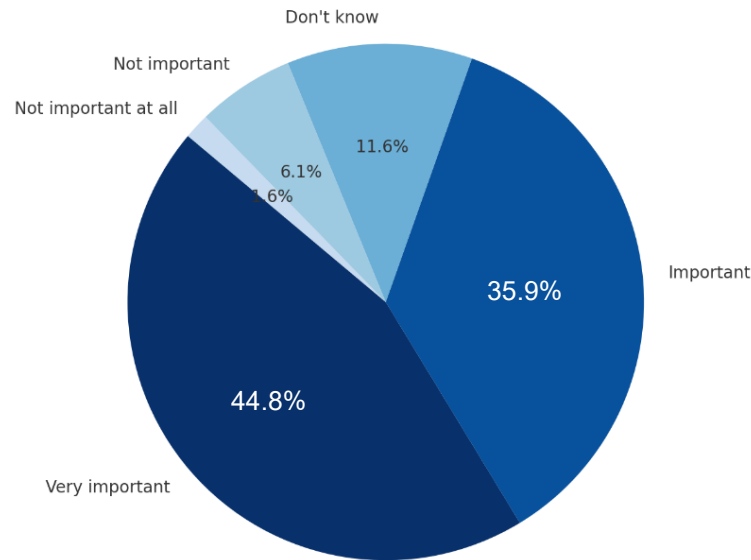
## Public Support for Different Types of Alternative Energy



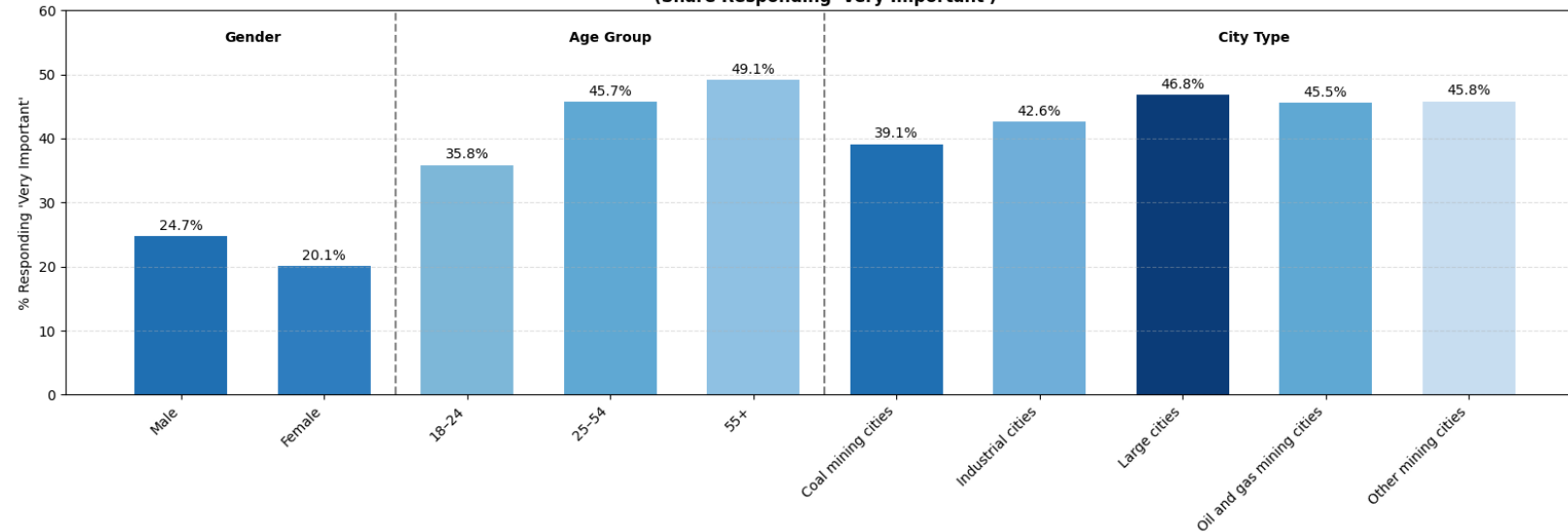
**89.9%** support solar energy and **73.5%** support wind energy

# Support for economic diversification

Perceived Importance of Economic Diversification Beyond Traditional Industries



Support for Economic Diversification (Share Responding 'Very Important')



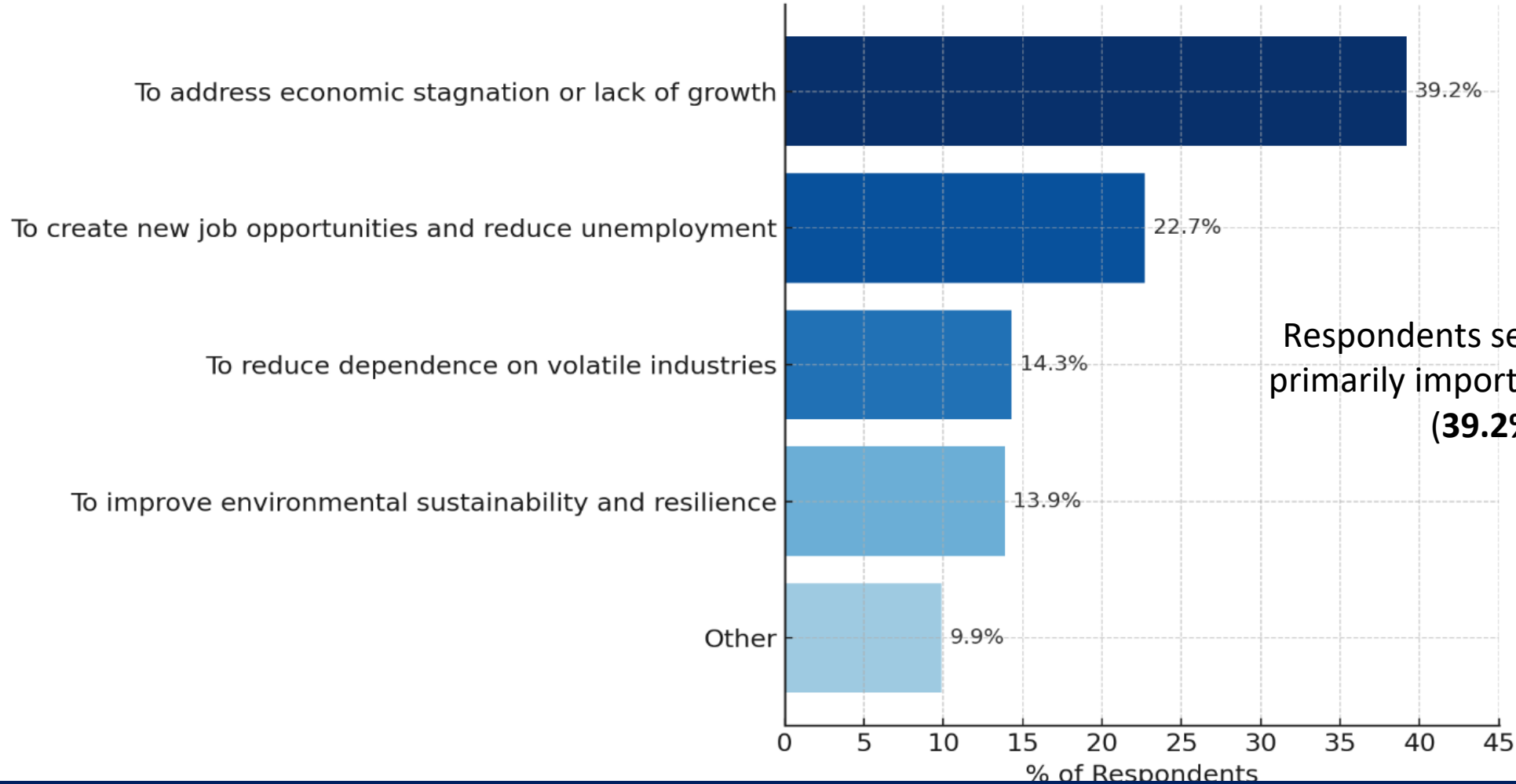
“Very important” is highest among:

- **Older respondents**, rising from 35.8% (18–24) to 49.1% (55+).
- **Men**, who show stronger support (24.7%) than women (20.1%).
- **Large cities**, with the highest share rating diversification as very important (46.8%), closely followed by oil & gas and other mining cities (around 45–46%).

**80.7%** of respondents consider economic diversification “very important” or “important,” especially in large cities and industrial areas.

# Why do people support economic diversification?

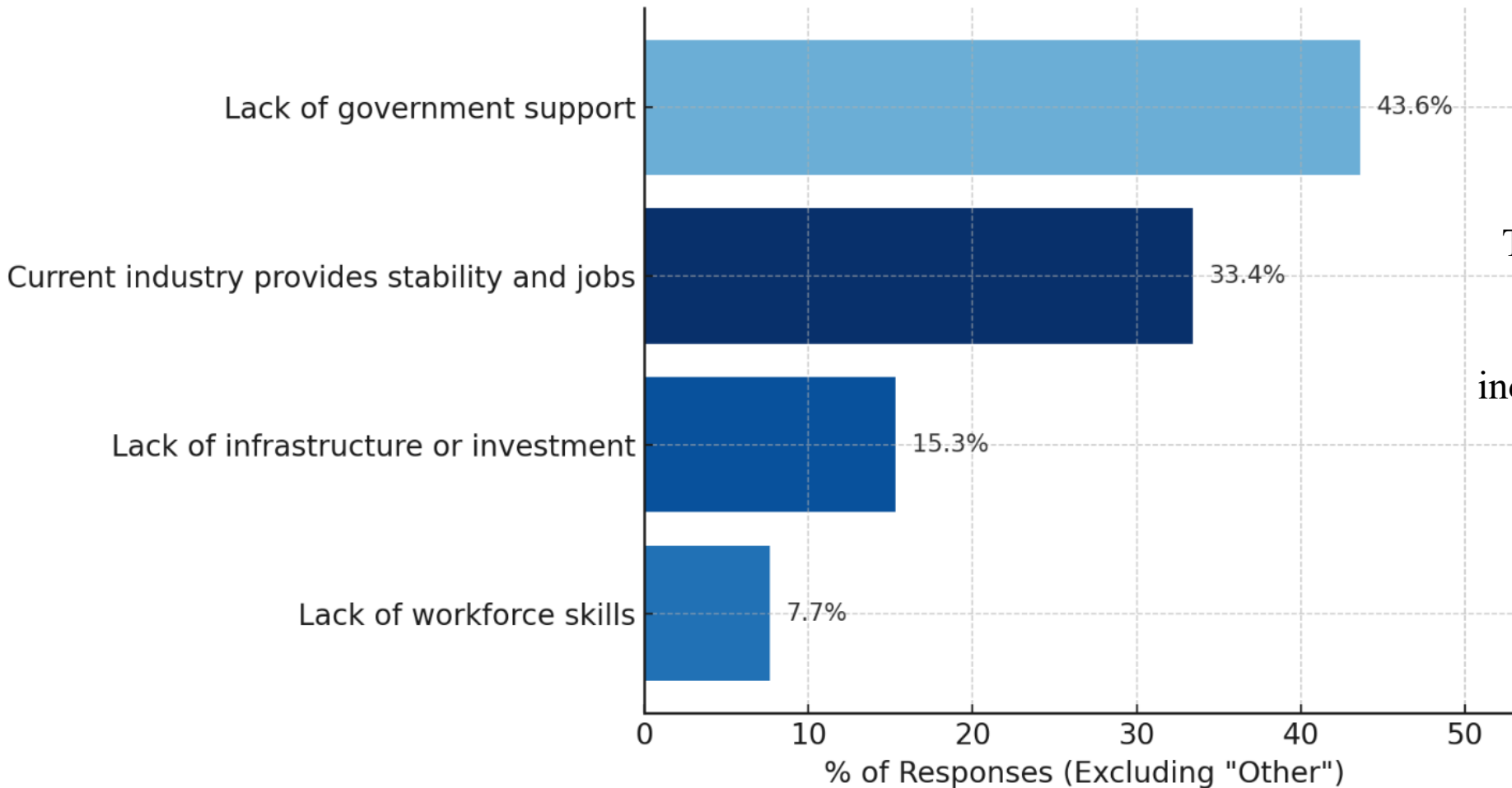
Reasons Why Economic Diversification is Important



Respondents see economic diversification as primarily important for addressing stagnation (**39.2%**) and unemployment (**22.7%**).

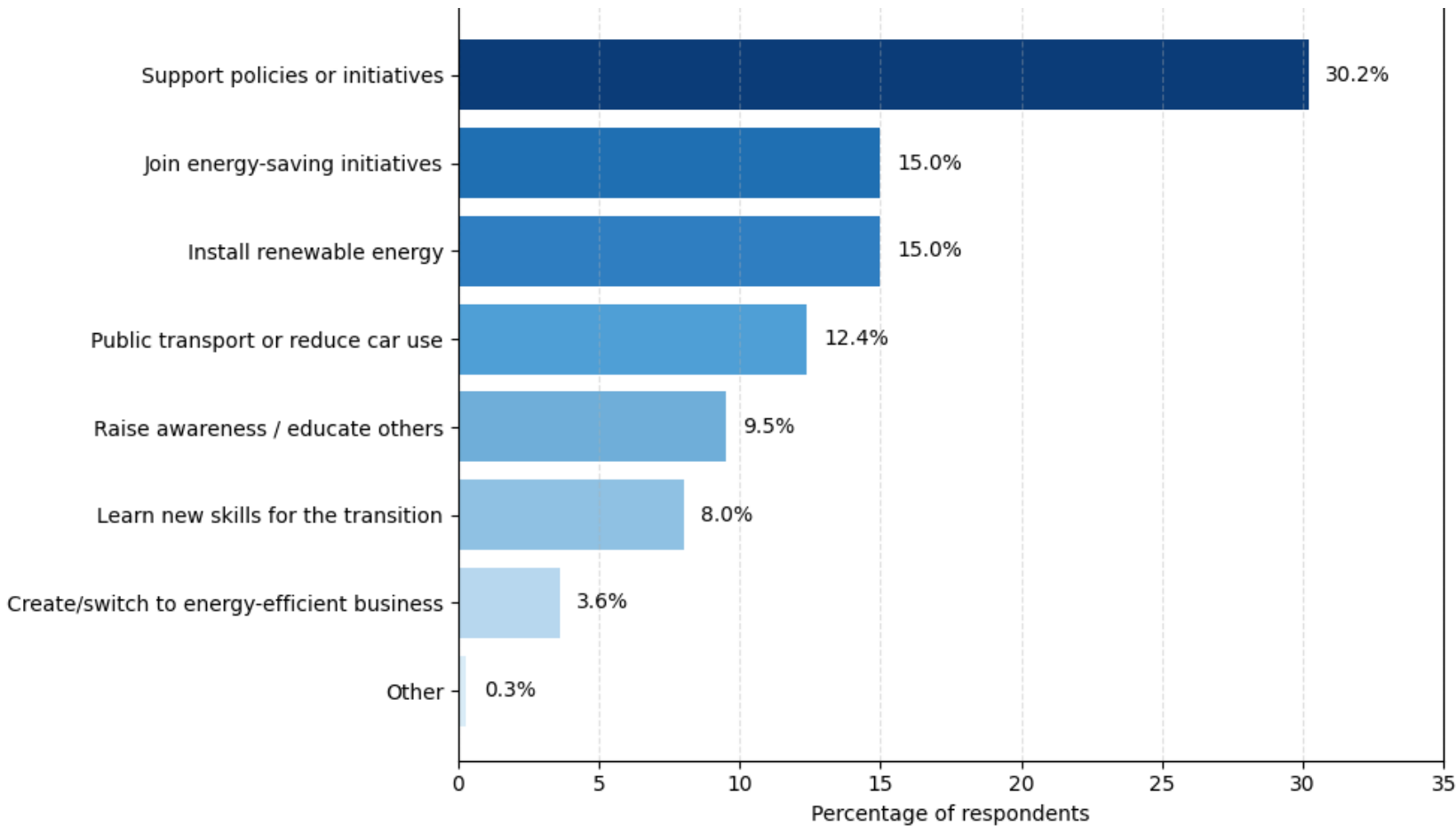
# Why is economic diversification not a priority?

Reasons Why Diversification is Not Seen as Important (Sequential Order, Excluding 'Other')



The most common reason was lack of government support (43.6%), followed by the belief that current industries provide sufficient stability and jobs (33.4%).

# Willingness to act for the energy transition



**Collective actions prevail:** Support for policies (30.2%) clearly outweighs more demanding individual or economic actions.

**Selective behavioral change:** Moderate willingness to adopt practical measures (12–15%) suggests engagement is conditional rather than transformative.

**High barriers to structural change:** Limited readiness to reskill (8.0%) or start green businesses (3.6%) points to perceived economic and capability constraints.

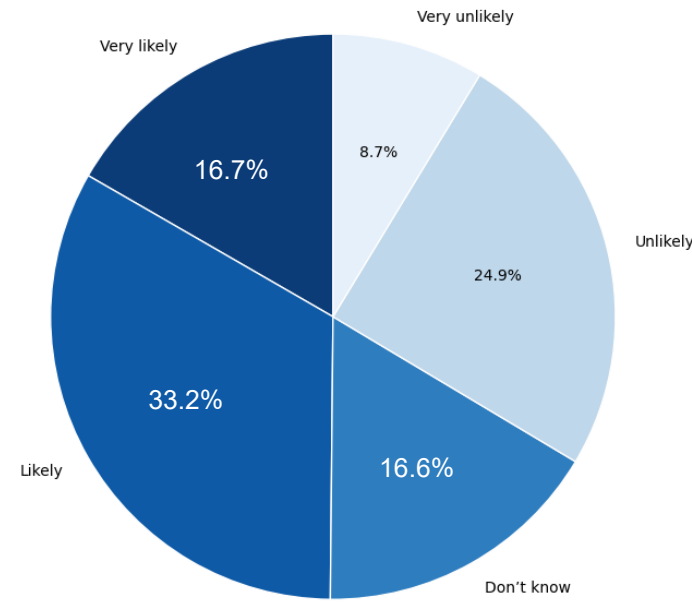
16.7% of respondents are very likely to consider a job in the green economy.

No significant gender difference (9% men vs. 7.7% women).

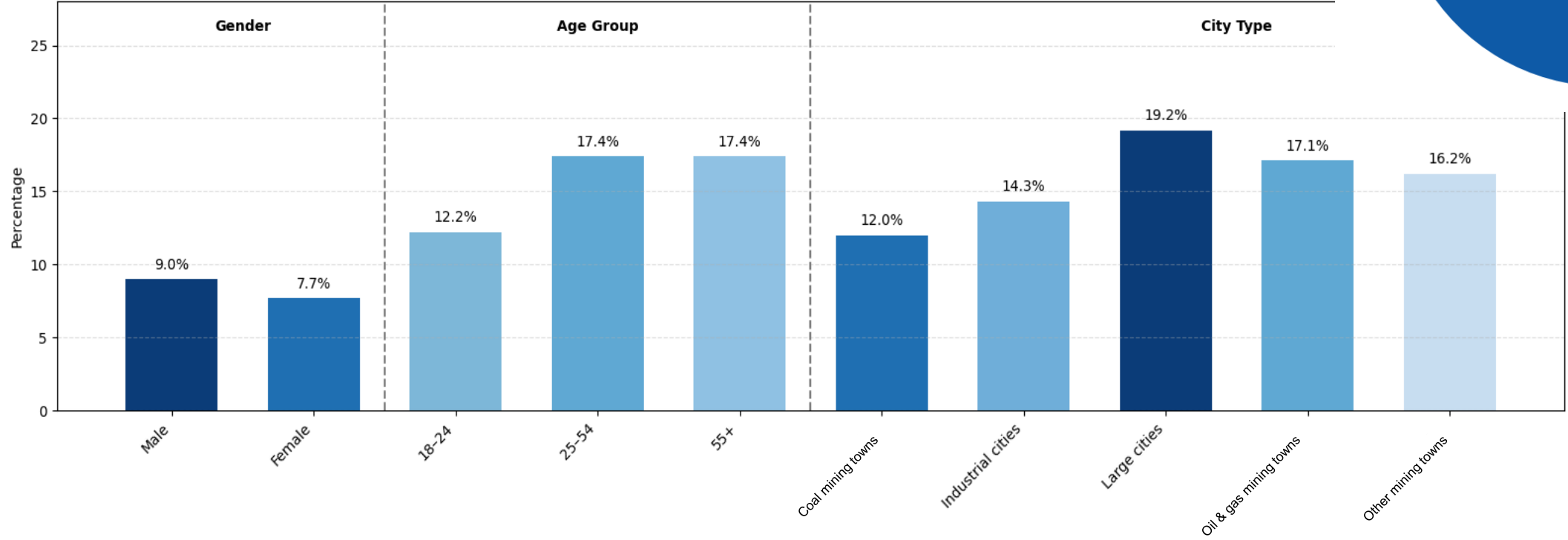
Working-age groups (25–54) and older respondents (55+) show the highest willingness (17.4%).

Large cities lead (19.2%), while coal mining towns lag behind in openness to green jobs.

Likelihood of Choosing to Work in the Green Economy



Likelihood of Choosing to Work in the Green Economy (by Gender, Age Group, and City Type)

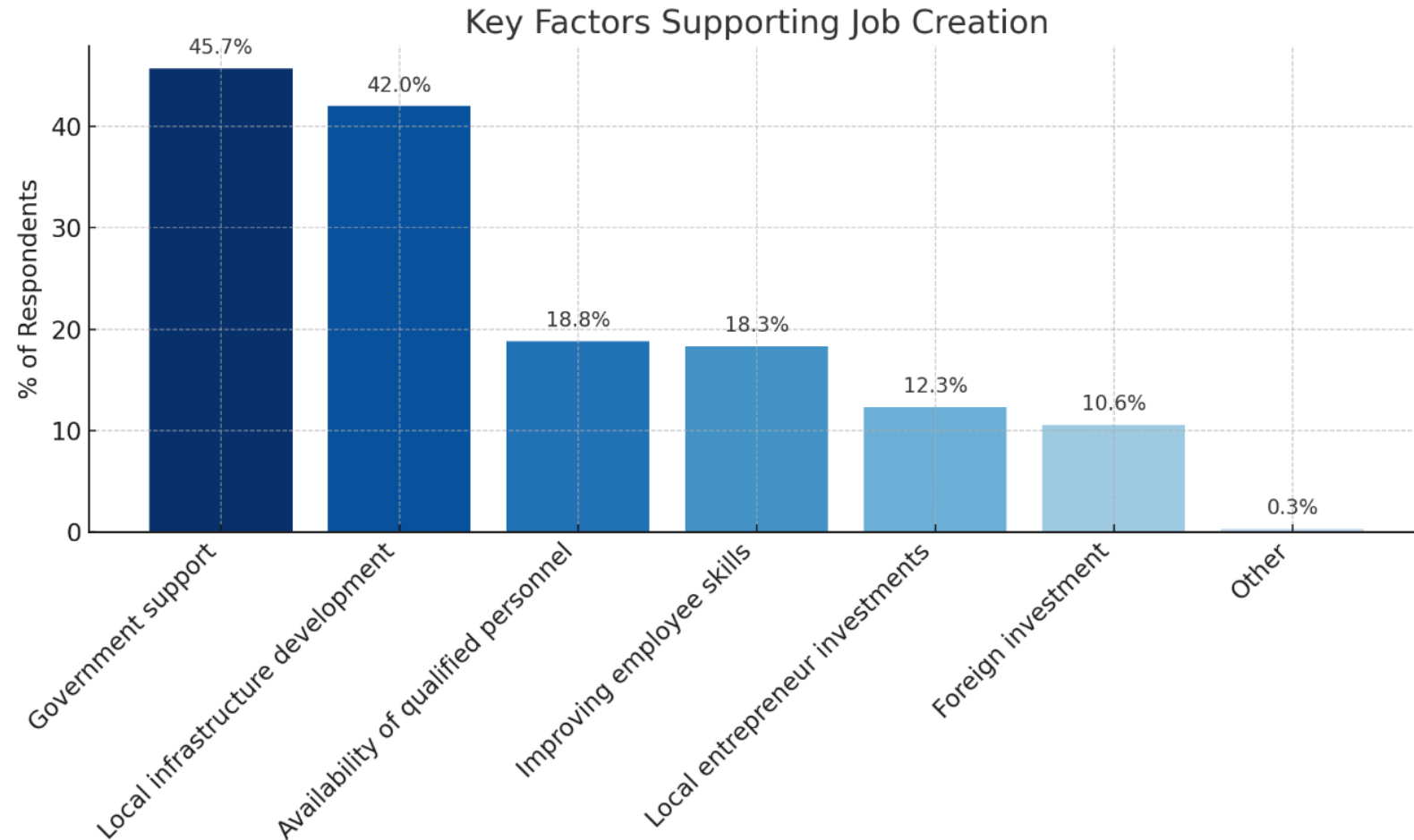


Source: Junussova, M., Maulsharif, M., Soltybayeva, S., & Brown, S. (2026). Public Perception of Decarbonisation in the Fossil Fuel Reach Country: Challenges of Just Energy Transition in Kazakhstan. IPPA Working Paper.

45.7% believe the public sector should be a key enabler of green job creation.

42% support infrastructure development as a key enabler of green job creation.

Private investment is seen as less influential.



# Key Findings

Despite high awareness of climate change impacts (92.3%), significant share of **respondents (43.3%) are unaware of main Kazakhstan's energy transition policies**, indicating the need for improved public communication and outreach.

**Support for decarbonisation and renewable energy is high**, with 68.7% expecting positive impacts and 76.8% supporting renewable energy development - particularly solar (89.9%) and wind (73.5%).

**Economic diversification is widely valued**, with 80.7% considering it important. It is seen as a solution to stagnation (39.2%) and unemployment (22.7%), across all cities.

# Key Findings

**Jobs opportunities and risks:** While 49% of respondents express interest in green jobs and 55.2% associate the energy transition with the emergence of new employment opportunities, job losses remain a dominant concern: 63.4% cite job losses linked to the phase-out of fossil fuels, whereas only 8% are ready to learn new skills for energy transition.

**Regional disparities are evident:** optimism is concentrated in large cities, while mining towns exhibit scepticism. Only 21.5% in coal regions believe new jobs are likely.

**Government support (45.7%) and infrastructure development (42%)** are critical enablers for green job creation, whereas private investment is perceived as less influential.

**Thank you for your attention!**