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## Socio-Economic Aspects of Middle-Class Identification: Criteria and Challenges

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**Abstract.** This article provides an in-depth analysis of the formation of the middle class in Kazakhstan, the criteria used to define it, and its socio-economic significance. The study traces the historical evolution of the middle-class concept, drawing on economic and sociological theories from antiquity to the present day. The authors argue that the middle class should not be defined solely by income level, but also by a combination of factors such as professional status, homeownership, savings, education, and cultural capital. The article examines the current situation in Kazakhstan, presenting statistical data on median wages, the minimum subsistence level, housing quality, savings rates, and educational attainment. It is noted that the middle class comprises only 10–15% of the population and remains unstable, highlighting the need for adjustments in economic policy. Drawing on international experience, the authors emphasize the importance of implementing systemic reforms to strengthen the middle class in Kazakhstan. These include ensuring labor market stability, improving financial literacy, expanding access to housing, and supporting small and medium-sized enterprises (SMEs). The article underscores that a strong middle class is essential for sustainable socio-economic development and national stability.

**Keywords:** Kazakhstan, middle class, income, stratification, economic policy, public governance, financial stability.

### Introduction

At the present stage, the intensification of global economic changes, increased competition in the international market, and changes in the social structure of the population make it urgent for the countries of the world to reconsider the role of the middle class. The middle class is considered the backbone of the social stability and economic development of the state. The

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formation and expansion of this social group is one of the main factors that ensure an increase in the well-being of citizens, an improvement in the standard of living, and maintaining balance in society. In economic science, strengthening the middle class is regarded as a guarantee of the long-term development of the state and the establishment of democratic institutions.

Kazakhstan also does not stand aside from these global trends and in recent years has been paying attention to the issues of forming the middle class, its economic support, and strengthening its socio-political role. However, approaches and scientific methodologies on the specific dimensions, structure, and mechanisms of formation of the middle class in Kazakhstan are different. On the one hand, the number of citizens who identify themselves as representatives of the middle class is growing; on the other hand, their real economic situation calls into question the stability of this social group. Therefore, in the conditions of Kazakhstan, there is a need to conduct a comprehensive scientific study to identify the middle class.

In addition, the most frequently discussed issues revolve around income inequality between the rich and the poor, as well as the need to support small and medium-sized enterprises (SMEs). Within the scope of this research, the objective was to identify the main approaches to defining the middle class as a driving force of the New Kazakhstan economy. To achieve this goal, the following tasks were outlined:

1. To formulate a theoretical definition of the middle class;
2. To develop a system of criteria for identifying the middle class;
3. To analyze the current state of the middle class in Kazakhstan.

## Literature review

The structure of the global economy has undergone significant changes – emerging markets have begun to play a more prominent role. Several international actors have improved their economic performance, gained economic dominance within their territories, increased income levels, and become active players with considerable weight in global and regional affairs.

It is important to note that the foundations of socio-economic stratification originated in antiquity. Ancient Greek scholars such as Aristotle and Euripides were among the first to study this in their works [2,3]. Regarding the middle class, both scholars regarded it as a core value and pillar of the state. According to their understanding, the middle class is the group that brings benefit to society, situated between the rich and the poor. In the oligarchic societies of their time, this group was seen as useful because "unlike the poor, they possessed property and did not seek to seize the possessions of others." Based on the views of Greek thinkers, we can conclude that the middle class contributes to state stability, consists of economically independent and active citizens, and is relatively unaffected by negative sentiments toward the state. In times of economic complexity or crisis, this group relies on its own capabilities and demands fewer socio-economic obligations or benefits from the state.

This idea demonstrates that the discussion of class differentiation in society and the clarification of the middle class's role is closely linked to periods of economic instability. The need to address problems in economic functioning leads to efforts to classify the population by income levels. This is primarily driven by the state's need to increase public revenues and to manage government support more effectively.

The German scholar Karl Marx provided one of the first clear categorizations of the middle class by profession [4]. In his work *Capital*, he divides capitalist society into three groups: the bourgeoisie, the proletariat, and those who belong to neither – peasants, artisans, and others. From this, we can observe that members of the middle class are typically those who earn their own income or have the potential to earn a high wage.

The concept of class was further developed by Max Weber, who systematically categorized class divisions in society and defined their criteria [5]. His unique contribution was classifying people based on their ownership of positive or negative property rights. Those with positive property advantages were characterized by substantial assets and the ability to generate income, often dominating a particular market. Those with negative property status included slaves, laborers, and debtors. In between these two groups were free peasants, artisans, traders, financiers, and skilled workers. The most important distinguishing feature of this middle group is that they possess either property or a valuable skill – i.e., they are associated with a specific sector.

Weber's conceptualization can be seen as a synthesis of Aristotle's and Marx's perspectives, offering a comprehensive framework. A review of the works of these scholars suggests that the middle class should be regarded as a force capable of leading the state out of economic crisis. On the other hand, it also allows us to predict that interest in this social group tends to increase, especially during times of economic instability.

5th century BCE	<b>Aristotle, Euripides</b> Viewed the middle class as the core value and foundation of the state structure.
19th century	<b>Karl Marx</b> Identified the middle class as a group of property owners within capitalist society.
Early 20th century	<b>Max Weber</b> Clarified the concept of the middle class in relation to property ownership and occupation.
Early 20th century	<b>A. Toynbee</b> Considered the growth of the middle class as a key indicator of a society's success.
Second quarter of the 20th century	<b>E. Lederer and J. Marschak</b> Initiated the stratification of social class into subgroups from a socio-economic perspective.
Mid-20th century	<b>W. Warner and P. Lunt</b> Were the first to attempt a comprehensive characterization of the main features of the middle class under new conditions.

**Figure 1 Evolution of Economic Thought on the Middle Class**

Note: Compiled by the authors based on [2,3,4,5,6,8,19]

The role and formation of the middle class in the economy and society can also be found in the works of A. Toynbee [6]. According to him, the development of modern civilization must be accompanied by an increase in the size of the middle class, and this process itself should be regarded as a key indicator of a society's success. He argues that one of the primary responsibilities of the state should be to support and assist the middle class. This approach differs from earlier studies in that it does not associate the importance of the middle class solely with the existence of economic problems; instead, it positions the middle class as the fundamental basis and driving force of state development.

Due to industrial revolutions, the earliest signs and groups of the middle class in a capitalist-market society were formed in the United States. Over time, this socio-economic stratum evolved and became the largest segment of American society. Analyzing its characteristics, we can see how Max Weber's ideas evolved further: quality education, high professional skills, non-physical labor, specialized knowledge and abilities, and personal self-identification. Compared to Weber's original classification, we observe that the middle class has undergone further differentiation and internal stratification. This transformation was largely due to the widespread expansion of education in the 20th century and broader access to professional qualifications. In the modern context, being part of the middle class now requires not only education but also the continuous enhancement of personal value and capabilities. A notable feature of Weber's research is that he did not limit the middle class to economic characteristics, but also included personal attributes.

In the mid-20th century, Austrian economist E. Lederer and American economist J. Marschak published a pioneering theoretical study in 1937 titled *The New Middle Class*, in which they redefined the middle class [19]. Although both scholars came from the field of economics, their main focus was on the working class. They emphasized that the defining feature of the new middle class was less economic and more social in nature. Their empirical observations showed that during the study period, the middle class increasingly included various levels of employees and workers. Later, sociologists began stratifying this group into subcategories such as "white-collar workers" and "black-coated workers." These scholars considered the status of this group in society, noting that their growing income also led to increased economic opportunities, which allowed them to form a distinct public image. Therefore, it is more accurate and scientifically valid to define the middle class based on its economic-financial capabilities rather than purely social characteristics. The development of economic science has expanded the scope of classification criteria to include not only economic and social indicators but also purely financial characteristics.

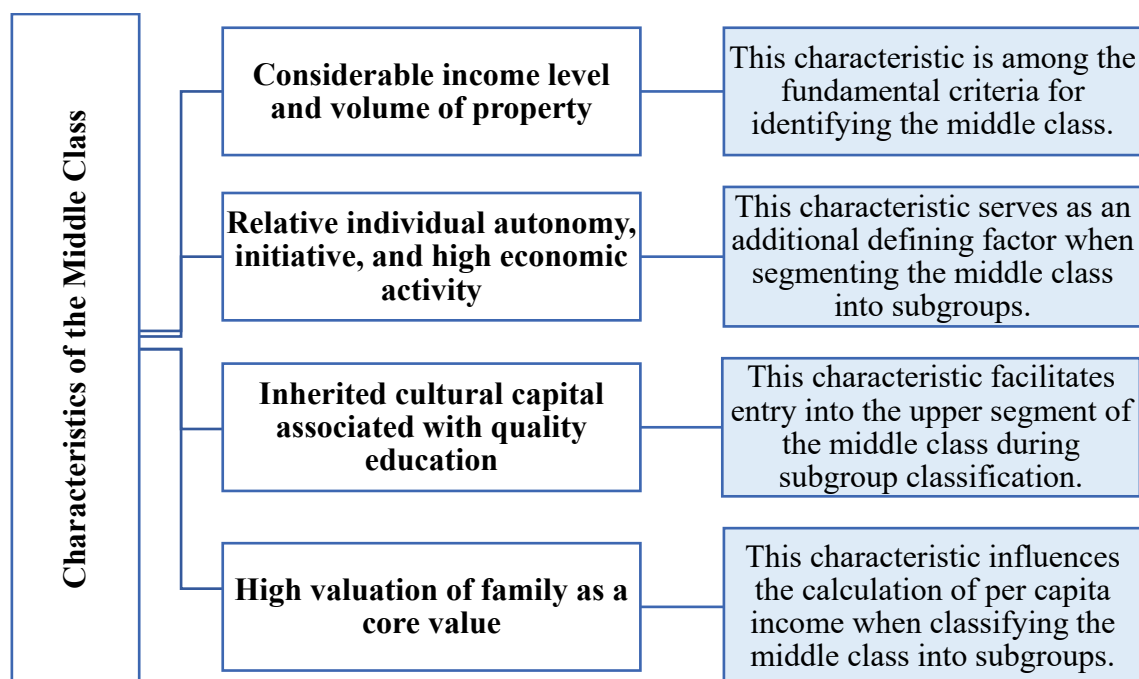
American sociologist C. Wright Mills, in his study of the U.S. economic structure, noted the emergence of a new middle class in capitalist society known as the "white-collar" class [7]. He classified the middle class in capitalist America into three subgroups: the old middle class, the working class, and the new middle class. Among these, the new middle class showed the most significant growth during the studied period. This leap can be attributed to the distinctive characteristics and values of this group, which include:

- strong emphasis on residential quality;
- special attention to health and well-being;
- investing in quality education and the education of their children;
- high interest in media;
- and a focus on promoting the stability of a social structure based on new middle-class values [7].

These values and actions may be considered foundational in shaping the middle class in the modern era, based on current global trends. In conclusion, Mills' work reflects the need to redefine and reassess the middle class in the era of the global economy.

In the mid-20th century, the United States became a key center for the study of the middle class. Researchers W. Lloyd Warner and Paul S. Lunt continued empirical research and were the first to attempt a comprehensive description of middle-class characteristics (see Table 1) [8].

A unique aspect of their characterization was the idea that the middle class could be formed through both inheritance and cohabitation, emphasizing the family as a factor in middle-class formation. Expanding on this idea, we can classify the middle class as either inherited or newly formed. Inherited cultural and economic capital contributes to the expansion of the middle class through the transfer of wealth and the formation of dynastic groups. However, such groups also have a high likelihood of transitioning into the upper class. Moreover, financial and economic growth is faster and more efficient when it occurs collectively rather than individually. Thus, the expansion of the middle class can also be achieved through group-based adherence to shared values. Living in groups with proper models has long been shown to be an effective model of societal organization.



**Figure 2 Comprehensive Characteristics of the Middle Class According to W. Warner and P. Lunt, 2025**

Note: Compiled by the authors based on [8]

Another distinctive feature of these scholars' research is that they divided the middle class into separate subgroups and initiated further internal stratification. As a result of their study, the middle class was classified into upper and lower segments, with clear distinctions in their boundaries and professional sectors (see Table 1).

**Table 1. Characteristics of the Upper and Lower Middle Class According to W. Warner and P. Lunt[8]**

Class	Description	Comments
Upper Middle Class	Includes managers, professional specialists, and high-ranking officials who have a high-income level, are career-oriented, have the opportunity to send their children to elite colleges and universities, actively participate in public life, and reside in prestigious urban areas.	The characteristics of this group help to clarify the proportional distribution of middle-class representatives based on whether they reside in urban or rural areas. In other words, it allows for the identification of how the place of residence influences income sources and inclusion in a particular social class.
Lower Middle Class	Includes mid- and lower-level public servants, small business owners, farmers, skilled employees, traders, and other professionals with secondary education who are not engaged in heavy physical labor.	Representatives of this group, based on income level, may be found across all regions and districts regardless of place of residence. Their percentage share can be determined through comprehensive research.

Note: Compiled by the authors based on [8]

While the classifications in Table 1 may have accurately described American society in the 1950s and marked an important step in the study and categorization of the middle class at the time, in today's reality, these characteristics have become more mixed and interchangeable. For example, skilled workers and traders today can confidently belong to either of the two middle-class groups based on their economic and financial capabilities. As for civil servants, although individually they may correspond to the profile described in Table 1, when considered in the context of a household or family unit, they may fall into the lower class.

One important factor that must be considered in this and all middle-class research is the impact of cohabitation or living as a family unit on middle-class formation. A family may consist of four members, with only one employed in the public sector or holding a high-paying job. While this individual may appear high-income when assessed independently, the per capita income within the family may fall below average, or even into the low-income bracket.

Thus, while family living should be seen as a positive factor in middle-class formation in terms of values, it is crucial not to overlook its impact, positive or negative, on economic and financial capacity.

Based on the theories of the scholars mentioned above and the resulting classifications, today's American middle class is typically divided into three distinct subgroups (see Table 2).

**Table 2. Contemporary Subdivision of the Middle Class in American Society [9]**

Middle Class Group	Description	Comments
Upper Middle Class	Includes professionals with higher education or academic degrees,	The characteristics of this group make it possible to assess whethe

	high salaries, and relatively low dependence on economic crises. “Professional specialists” are individuals with university degrees, extensive experience, high professional competence, engaged in creative work, and self-employed (through private practice or independent professions). This group includes lawyers, doctors, scientists, educators, and other specialists.	the group meets real-world economic criteria. Some elements in this description reflect not just economic status but also social standing, allowing for the separate identification of the intellectual segment within the group based on their prestige in society.
Middle Middle Class	This group is economically more vulnerable than the previous category. Representatives of the middle middle class often have to rely on two sources of income, as a single salary may not be sufficient to cover living expenses. Although many members of this group hold respectable positions, their level of independence is significantly lower.	The characteristics of this group allow for the identification of an average income level within the economic factors considered as the primary basis for defining the middle class—particularly through the salary or income criterion.
Lower Middle Class / Working Class	This group includes individuals with relatively lower levels of education, such as those with only a college degree. They are employed in lower-prestige occupations and are particularly vulnerable to economic difficulties in the country.	The characteristics of this group help identify the segment most at risk of falling into poverty and define the most economically vulnerable subgroup within the middle class.

Note: Compiled by the authors based on [9]

The characteristics presented in Table 2 above, when applied to the context of Kazakhstan or other developing countries, can vary significantly, depending on the income sources and professional status of individuals in each country. When identifying middle-class groups, it is more appropriate to focus on income and economic capacity rather than solely on social status. Recognizing economic factors as the primary indicators in defining the middle class allows for more accurate classification and analysis. Meanwhile, social and other perspectives should be considered secondary factors.

In today’s capitalist society, class divisions are no longer determined by social prestige or status, as was the case during feudal times, but rather by financial and economic capabilities. According to Pierre Bourdieu, capital consists of four components: economic (material resources, property, income, etc.), cultural (education, skills), social (connections, environment, relationships), and symbolic (prestige, recognition) [10]. Thus, for the middle class, the components of economic capital—such as material resources, property, and income—serve as concrete indicators.

The second half of the 20th century	Second half of the 20th century	First quarter of the 21st century
<b>Bordieu</b>  He identified the four forms of capital for the middle class along with their constituent elements.	<b>Shakaratan</b>  Concluded that it is unnecessary to study the middle class and that it will not form as a distinct social group.	<b>Tikhonova, Bhalla, and others</b>  Systematized two main methods for defining the middle class based on income level.

**Figure 3 Development of economic thought about the middle class**

Note: Compiled by the authors based on [11,12,13,15]

Today, it is known that no common concept or concept has been formed on the middle class. On this issue, scientists from some countries even express their opinion that it is not necessary to study the middle class as it has not been formed (O. I. Shakaratan) [11]. However, from our point of view, in the history of mankind, since the formation of the concept of property, there has been a division of society into classes. The middle class was and will continue to be, it is formed, it is transformed only with a certain time and time, those who follow this current are included in this group, those who do not follow become the lower group.

If we analyze the classification of the middle class by branches of science, it is sociologists who have studied this topic the most. The most popular definition distributed among sociologists recognizes that “the middle class is a set of social groups that occupy an intermediate position in the stratification system of society between the lower class consisting of the poor and the upper class consisting of the rich” [12]. It is clear from the given definition that this opinion held by sociologists was formed on the basis of the views of Aristotle and Euripides. And at the heart of the final opinion of these scientists is the concept of property. As we have already noted, the emergence of property led to the division of society into classes. It was only from antiquity that he began to be interpreted. At the heart of this is the concept of property of economic science. And today in economic science, economists are studying the concept that it is possible to form a middle class on the basis of the growth of the well-being of the population. Therefore, they focus primarily on defining the boundaries of the income level of this global middle class [13].

At present, there is a wide variety of approaches and criteria used by sociologists and economists to determine the size of the middle class. Consequently, the proportion of the middle class in a given country can vary widely. Even among economists, there are differing opinions and potential miscalculations in determining the exact percentage. For instance, in 2010, Russian economists conducting a cross-national study on middle-class identification concluded that the share of the middle class was larger than sociologists estimated. According to World Bank reports, the middle class is defined as the population with a daily per capita consumption of at least \$10 (in purchasing power parity, PPP). Since the 1990s, this indicator



has increased significantly, and by 2014, the middle class in Russia accounted for approximately 60% of the total population [14].

Absolute Approach	Relative Approach
<ul style="list-style-type: none"> <li>• Absolute income level</li> <li>• The income range of the middle class is defined as \$10–50 per day based on Purchasing Power Parity (PPP).</li> </ul>	<ul style="list-style-type: none"> <li>• Median income level</li> <li>• The average median income must be above the poverty line (subsistence level).</li> </ul>

**Figure 4 Main Approaches to Defining the Middle Class**

Note: Compiled by the authors based on [14]

When reviewing the research of global economists on the criteria for defining the middle class, it becomes clear that rather than using a generalized approach, economists primarily apply two main methodological approaches that focus on income levels [15].

The first is commonly referred to by researchers as the absolute approach. It is mainly used for cross-country comparisons and for analyzing the global middle class. This method considers the absolute level of income. According to a 2014 study, the income boundaries of the middle class are generally defined as \$10–\$50 per day in purchasing power parity (PPP) terms [14].

However, the absolute approach has two significant shortcomings:

1. The methodology for calculating purchasing power parity (PPP) is itself debated, as even major international organizations use different methods.
2. The \$10- and \$50-income thresholds are also subject to criticism, as these figures are considered arbitrary and conditional from the outset.

The second approach is used by both economists and sociologists. We believe this approach may be more accurate because it accounts for real-world conditions and addresses the shortcomings of the first method. This approach is rooted in classical thought dating back to antiquity, based on the idea that the middle class should fall between the lower and upper classes.

This method assumes that the middle class should correspond to the average income level within a specific country. Methodologically, this approach is based on the median income level of society. However, accurately determining the median income is essential for this method to work effectively.

There are three key prerequisites for applying this approach:

1. The average median income must be above the poverty line (subsistence level). For this to happen, the state must fulfill its basic social responsibilities, such as providing access to healthcare and education at standards comparable to developed countries, and ensuring housing is accessible to the population.
2. The risk of falling into poverty for members of the middle class (i.e., the likelihood that their income will fall below the subsistence level within 3–5 years) should not exceed 10% [16].
3. As previously mentioned, the accuracy and reliability of the methodology used to determine median income are crucial. Otherwise, any discrepancies between real conditions and the resulting classification render the research ineffective.

As of today, Kazakhstan lacks a clearly defined concept and set of criteria for identifying the middle class. In fact, many published statistics are not objectively reflective of reality. Some local economists have shared their views and findings on the middle class. For example, economist A. Chukin noted in an interview that "our middle class consists of people who have some savings." However, he did not specify what level of savings qualifies a person as middle class. He further stated that "80% of people who have savings have nothing – because of high consumption levels" [17].

This observation is backed by fact: in Kazakhstan, food expenditures alone account for 49.4% of total household spending [18].

To determine the status of the middle class in Kazakhstan, a ZTB News correspondent interviewed several government officials and experts. The interviewees expressed the following views on the current state and definition of the middle class:

Minister of Labor and Social Protection of the population S. Zhakupova said, "There is a middle class in Kazakhstan. One of its signs is to receive a salary at a level not lower than the median salary, or more than 250 thousand tenge." But there is no opinion on how many people exceed the specified limit. The same question was asked to the deputy of the Mazhilis of the Parliament of the Republic of Kazakhstan, A. Sarym, who stated that "he belongs to the middle class and belongs to this group, those who have property and stable income." According to Deputy Aidos Sarym, the concept of "middle class" is not limited to the amount of income, but also includes a set of specific features. These features include the ability to exist independently (self-sufficiency), a high cultural level, and an active civic position. In his opinion, it makes clear what social group a person belongs to (that is, self-identification), and it is very important that he has his own economic and social positions. Political scientist Dosym Satpayev noted in the interview a huge difference between income levels. He points out that, based on the methodology of the World Bank, the majority of the population (about 70%) faces a situation of poverty. According to his statistics, a significant part of the population of Kazakhstan spends more than 50-60% of their income on food. This, in turn, significantly limits the social opportunities of citizens, such as saving, investing in education, or participating in cultural and leisure activities. D. Satpayev listed what are the main features of determining a middle-class representative. According to him, to be a middle-class representative, you need to have a "higher education, own housing, a stable income, and internal self-determination to be financially independent of the state." According to the World Bank, stable income in developed countries is 3.5-4 thousand US dollars per month, while stable income in developing countries such as Kazakhstan can be about 700-2500 US dollars. Thus, while the report of the Minister of Labor focuses mainly on quantitative economic indicators, the deputies and the political scientist advocate a comprehensive definition that combines material and intangible factors. The opinions of the deputies indicate that self-identity (samoidentification) and subjective perception play an important role in determining belonging to a social group, and this complicates the development of uniform criteria for statistical research and policy formation. Comparisons with the World Bank criteria (for example, the definition of the concept of "fixed income") indicate an attempt to draw a parallel with foreign experience, but this also indicates that the economic reality in Kazakhstan does not correspond to generally accepted models. The various positions of the authorities in determining the "middle class" indicate the need to develop more specific methodological tools that, along with objective economic data, also take into account the subjective aspects of self-identity.

Another perspective on this issue was expressed by O. Kuspekov, a member of the Mazhilis of the Parliament of Kazakhstan from the Respublika party. He stated that the concept of the “middle class” remains complex due to the lack of a unified normative and economic definition. The use of tentative indicators, such as those proposed by the United Nations (e.g., an annual income below \$10,000), reflects an effort to define social group boundaries using quantitative measures. However, such an approach raises new questions: To what extent does the chosen threshold accurately reflect the real social situation? And how many people in the country meet those criteria? These remain unclear and problematic.

According to Kuspekov, the middle class in Kazakhstan is not particularly large. In the practice of allocating state resources, there is a noticeable trend: the larger the group, the more government support it tends to receive. Therefore, if the middle class is indeed small, state policy may shift its focus toward higher-income (above-middle) groups and lower-income (below-middle) groups. In this way, we see a prioritization of political and economic logic based on demographic proportions of social groups rather than on the objective redistribution of income.

In summary, we have analyzed a range of views and conclusions on the middle class, from the perspectives of ancient philosophers to contemporary Kazakhstani experts, regarding what it is and how it should be defined. As a result, we believe that identifying the middle class should be based on the following indicators and methods that offer the most objective results.

## **Methodology**

This study employs a comprehensive methodological approach to scientifically analyze the main criteria for identifying the middle class in Kazakhstan. The primary methods include statistical analysis, comparative method, empirical research, and analysis of international experience.

Statistical methods were applied to process and analyze data from the Bureau of National Statistics of the Republic of Kazakhstan over the past five years. Key indicators included median wage, minimum subsistence level, home ownership, consumption expenditures, savings rate, occupational status, and educational attainment. Based on these indicators, the share of the middle class was calculated.

Regarding the comparative method, international methodologies (World Bank, OECD) were used to define the middle class. Kazakhstan's indicators were compared with those of other developing and developed countries, identifying both differences and similarities. According to the OECD methodology, the middle class is defined as the group whose income ranges from 75% to 200% of the median income.

The empirical method was used to examine the main socio-economic trends in the formation of the middle class in Kazakhstan. In particular, it considered changes in the labor market, the role of entrepreneurial activity, consumer behavior, and saving capacity of the population. These data were used to describe the economic conditions of the population.

To determine the structure of the middle class and the key factors influencing its formation, studies from the U.S., Europe, and other developing countries were analyzed. This approach allowed the structure and development dynamics of the middle class in Kazakhstan to be examined within a global context.

### **The main data sources used in the research included:**

- Official data from the Bureau of National Statistics of the Republic of Kazakhstan (2019-2023);
- Reports from the World Bank and OECD;
- Official data on the labor market, housing market, and household income in Kazakhstan;
- International and domestic scientific articles and analytical reports.

**The research consisted of the following stages:**

1. Literature review and theoretical framework – studying definitions and criteria for the middle class;
2. Collection and processing of statistical data – analyzing five-year data across Kazakhstan;
3. International comparison – comparing Kazakhstan's indicators with those of other countries;
4. Conclusion and development of recommendations – preparing policy and economic proposals to expand the middle class based on the results obtained.

The main hypothesis of the study is that the structure of the middle class in Kazakhstan is unstable, and that revising economic policy is necessary to increase its share. This hypothesis was tested using statistical data and international experience

## Findings and Discussion

New trade and economic partnerships have emerged between developed and developing countries. Closer economic ties between states have contributed to rising income levels among populations. As a result, clear boundaries have begun to form in the structure of socio-economic strata within societies. Consequently, the need to identify social classes, such as the middle class, has become more apparent.

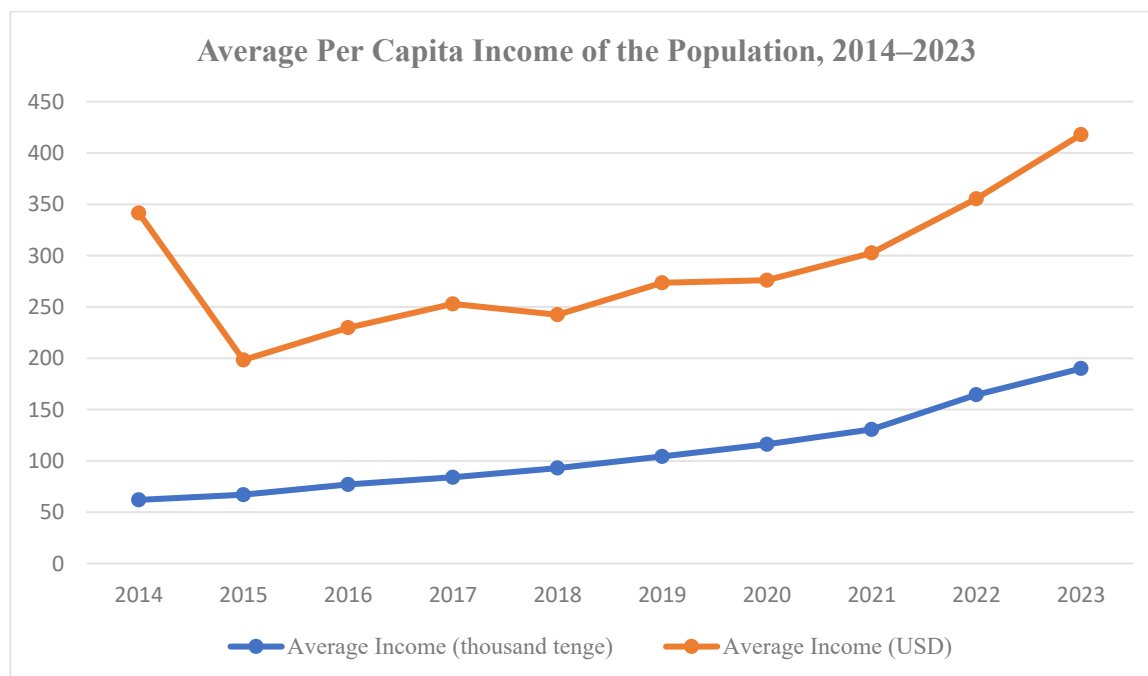


**Figure 5 GDP Growth in Kazakhstan Over the Past 10 Years**

Note: Compiled by the authors based on [1]

The discussion of changes introduced by the state in the tax regulation of entrepreneurship has sparked heated debates not only among business representatives but also among the

general public. This situation, in turn, has influenced researchers' perspectives on the issues they examine. The main concern is related to the slowdown in economic growth (Figure 6), the increase in government expenditures, and the intensification of social stratification in society.



**Figure 6 Average Per Capita Income of the Population, 2014–2023**

Note: Compiled by the authors based on [1]

As a result, the state has encountered difficulties in fulfilling its functions, specifically, in generating public revenues to finance government expenditures, and now faces the need to scientifically substantiate the underlying issues. According to statistical data from 2023, the number of small and medium-sized business entities in the country amounted to 2,026,500. While household income has increased in terms of the national currency, its value in U.S. dollars has fluctuated due to the depreciation of the tenge. Deep socio-economic classification in society is one of the main problems of Kazakhstan. To be a country with high economic growth, it is necessary to have a stable population. The problem of creating this society has been studied for a long time.

The middle class should be defined not solely by income level, but also based on a combination of socio-economic conditions, education level, housing situation, capacity for self-sufficiency, and cultural capital. Including additional socio-cultural factors enables a more nuanced segmentation of the middle class and a clearer identification of its representatives. However, the fundamental or core indicator in defining the middle class must be economic factors.

If we systematize the ideas presented above into a criteria-based framework, the indicators can be divided into objective and subjective categories:

- Objective indicators include:

- o Income level (both absolute and relative – for example, correspondence with the median income);
- o Property and financial resources (e.g., home ownership, personal savings);
- o Consumption and savings behavior (including daily consumption thresholds and vulnerability to poverty).

- Subjective indicators include:
  - o Self-identification as a member of the middle class;
  - o Socio-cultural capital;
  - o Level of professional development;
  - o Perceived standard of living.

If we express these in quantitative terms, the World Bank's 2014 report used a method that identified members of the middle class as those with a purchasing power of more than \$10 per day.

So, based on the above indicators and criteria, let us answer the key questions: How should the middle class be defined, and what is the current state of the middle class in Kazakhstan?

Households that belong to the middle class should have an income level above the poverty line and possess a comfortable standard of living. The key indicators for identifying the middle class include the median income, the minimum subsistence level, and the income range that defines the middle class.

In Kazakhstan, the median salary was approximately:

- 112,000 KZT in 2019,
- 204,000 KZT in 2022,
- and reached 251,356 KZT in 2023.

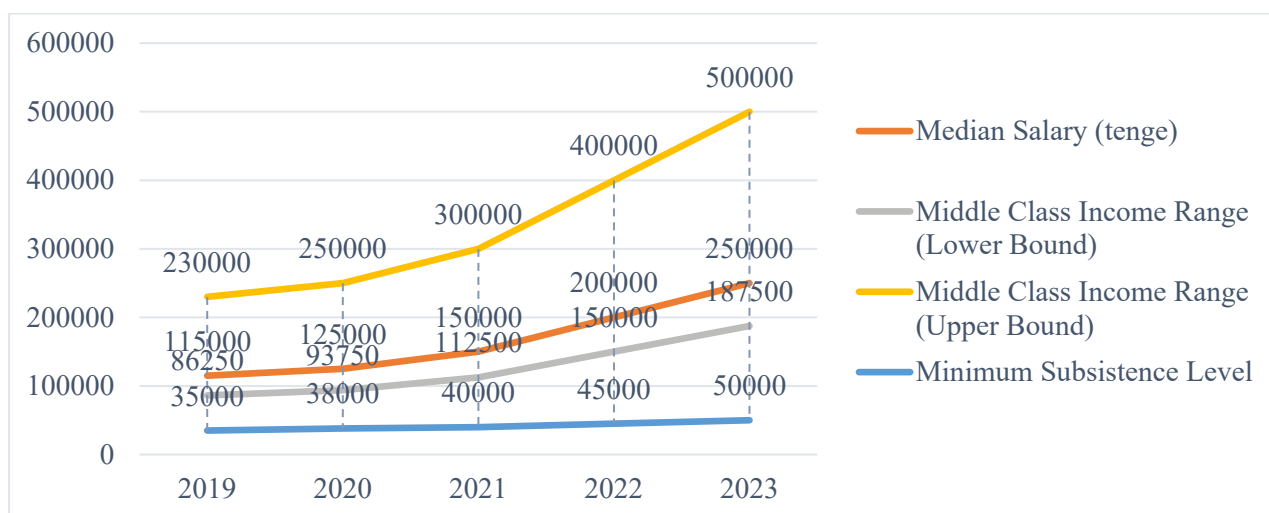
This figure reflects the actual average earnings of the population.

The minimum subsistence level (poverty line) was:

- 29,700 KZT in 2019,
- and 37,000 KZT in 2022.

According to the OECD methodology, households whose income ranges from 75% to 200% of the median income are considered middle class. In the context of Kazakhstan, this includes households with a monthly income between approximately 150,000 and 400,000 KZT.

Some researchers estimate that the middle class in Kazakhstan represents only 10-15% of the population. This includes people who earn above the median income but do not fall into the wealthy category – essentially, the "in-between" group of society.



**Figure 7 Median salary and middle-class income range in Kazakhstan**

Note: Compiled by authors based on [1]

This graph shows the median salary, subsistence minimum, and middle-class income range in Kazakhstan. The gray area represents the income range (75% -200% median salary) included in the middle class.

As we can see:

- Median wages are growing from year to year.
- The subsistence minimum is also growing, but it is still at a low level.
- The income range of the middle class is expanding over time, but most of the population is below or near this range.

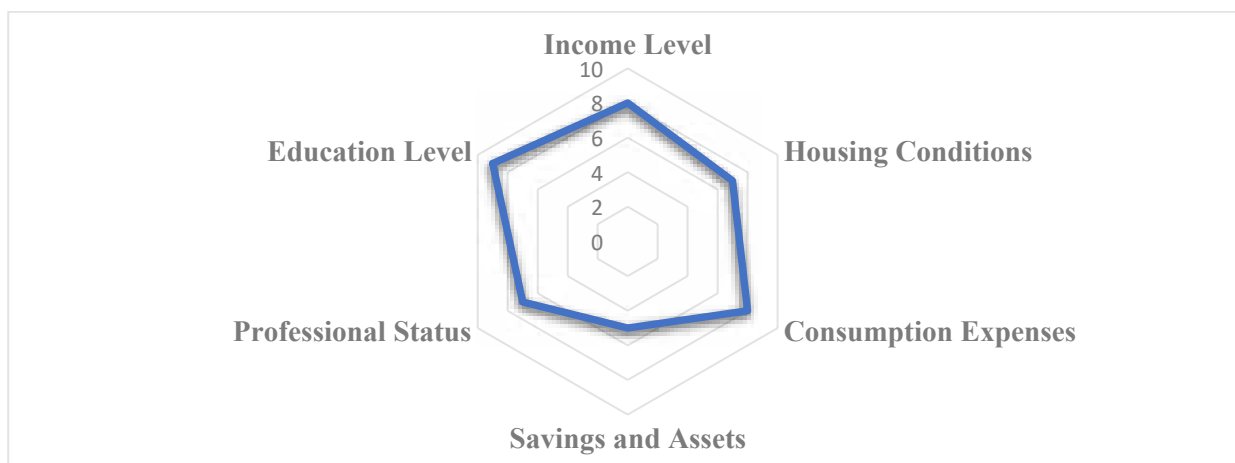
One of the main characteristics of the middle class is the presence of permanent housing or its purchase with a mortgage. The level of ownership of private homes in Kazakhstan is above average. In 2022, 60% of economically active citizens were owners of housing. But the quality of housing is an important factor. A third of houses in Kazakhstan were built more than 50 years ago, which leads to a decrease in their condition. Buying a house reflects the stability of the middle class, and living in a rented apartment is often characteristic of the lower class.

The middle class should be able to easily cover daily expenses and raise the standard of living. In Kazakhstan, more than 50% of the total spending of the population is spent on food. This is a high figure, since in developed countries the spending of the middle class on food is less than 20%. It is necessary that representatives of the middle class can form a certain savings after the main expenses. According to data for 2022, the average family saves only 7,000 tenge per month – this is an insufficient level. The middle class should be able to allocate funds for cultural and leisure activities, quality education, and health services.

The stability of the middle class depends on whether they have savings and assets. In Kazakhstan, the share of adults with a bank account has reached 81%, but the savings amount to an average of 204,000 tenge-this is enough to cover only a few months of expenses. A representative of the middle class must have a savings account, pension fund or investments. Citizens who do not have Financial Protection cannot be a real representative of the middle class, as they risk falling into poverty during the economic crisis.

Middle-class individuals should be employed in stable, skilled jobs or be successful small business owners. In Kazakhstan, the middle class primarily consists of skilled workers, public servants, teachers, doctors, engineers, and entrepreneurs. The professional status of the middle class depends on income stability, career advancement opportunities, and the availability of job-related benefits.

One of the key criteria of the middle class is higher education or professional qualifications. In Kazakhstan, the rate of secondary education attainment is 99%, while over 50% of the population has completed higher education. Most individuals who belong to the middle class should have a university degree or be professionally trained in technical fields.



**Figure 8 Key Indicators for Identifying the Middle Class, Radar Chart**

Note: Compiled by the authors

This radar chart allows for a comprehensive comparison of the key indicators used to identify the middle class:

- High scores:
  - o Education level (9/10) and income level (8/10) are considered the most important factors in defining the middle class.
- Medium scores:
  - o Professional status (7/10) and housing conditions (7/10) are essential elements that ensure a stable standard of living.
- Low score:
  - o Savings and assets (5/10) – financial stability of the middle class is still relatively weak.

Although income is very important, high income alone cannot be a full-fledged measure of the middle class. Other factors also influence belonging to the middle class (for example, housing, savings, and professional status). Therefore, not 10/10, but a high 8/10 score was given. Housing is important for the middle class, but has a slightly lower value than the income level. This is because even people with high salaries may not have the opportunity to buy a house, and on the contrary, people with average incomes may own a house by inheritance. Therefore, a score of 7/10 was awarded. Consumer spending determines the quality of life of the middle class, but this is not a direct criterion. If a person has a high income and can make expenses other than needs, he is close to the middle class, but if the expenses go mainly to needs, this indicates an affinity for the lower class. Therefore, a score of 6/10 was awarded. This factor is important, but savings still do not play a big role in the modern structure of the middle class in Kazakhstan. Representatives of the middle class should have financial stability, but at the moment, this indicator is weak. Therefore, a score of 5/10 was awarded. Although professional status is an important factor in the middle class, some highly qualified professionals may earn low wages, which puts them below the middle-class level. Therefore, a score of 7/10 was awarded. The level of education is the main pillar of the middle class, as higher education and professional skills are associated with high income and stable employment. However, some citizens with higher education may receive low wages, so a score of 9/10 was given, not 10/10.



As we have already noted, international organizations use absolute and comparative methods to determine the middle class. The absolute method establishes a certain level of income. The World Bank defines the middle class as the population that can spend at least 10-15 US dollars (PPP) a day. This is about per person per month for Kazakhstan 120 000 – 180,000 tenge means that there should be income. The comparative method compares the middle class with the average income of the population. According to OECD standards, the income of the middle class should range from 75% to 200% of the median salary (approximately in Kazakhstan 150 000 – 400,000 tenge).

Now let's take a deep look at the real situation in Kazakhstan. Using the above criteria and international standards, it is possible to identify the main features of the middle class in Kazakhstan:

1. Income growth and inequality: Although the average monthly income in Kazakhstan has increased, income inequality is still high. The middle class makes up less than 15% of the population.

2. High housing ownership, but low quality: Although the level of housing ownership in Kazakhstan is high, the quality of housing is different. Buying a good-quality home in a city can be difficult for the middle class.

3. Low level of savings and financial security: Although the average income increases, the ability to create savings is limited. People who do not have financial security can fall out of the middle class during the economic crisis.

4. Employment and professional status: The middle class consists mainly of skilled workers and public sector employees. However, wages are lagging behind inflation.

5. High level of Education: The level of obtaining higher education in Kazakhstan is high, but this does not bring good income to all citizens.

## **Conclusion**

In the modern economic system, the middle class is the main social group that ensures the stability of society and economic development. In the course of this study, the structure of the middle class in Kazakhstan, the main factors in its formation and the dynamics of development were analyzed in detail.

The lack of a clear definition of the middle class and a uniform view of its main criteria complicates the study. Although international methodologies offer different approaches to determining the middle class, they all have certain limitations. Given the Kazakh situation, it is important to determine the middle class not only by income level, but also taking into account its economic, social and cultural capital.

One of the main problems identified in the study is income inequality and financial instability. The share of the middle class remains relatively low in the country, which indicates the need for changes in economic policy. In addition, housing affordability, professional status, savings skills, and education levels have a significant impact on the stability of the middle class.

Systematic reforms are needed to support the development of the middle class in Kazakhstan. Ensuring stability in the labor market, improving the financial literacy of the population, supporting small and medium – sized businesses, and improving housing policy should be the main focus of the state. At the same time, economic policy should be aimed not only at increasing income, but also at improving the quality of life of citizens.

In general, this study not only emphasizes the importance of the middle class but also allows us to consider ways to strengthen it. The growth and development of the middle class in Kazakhstan can become a guarantee of the country's socio-economic stability. Therefore, the public and private sectors need to lay the foundations for this process and determine its development strategy.

#### **Authors' contribution:**

- development of the idea, collection and analysis of materials, writing the text – **Appazov A.A.**,
- construction of the research concept, design of the work, interpretation of the results of the work, critical revision of its content and approval of the final version of the article for publication – **Adambekova A.A.**
- interpretation of the results of the work, critical revision of its content and approval of the final version of the article for publication – **Simanavičienė Ž.**

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### **Орта тапты айқындаудың әлеуметтік-экономикалық қырлары: критерийлер мен сын-қатерлер**

**Аңдатпа.** Бұл мақалада Қазақстандағы орта таптың қалыптасу ерекшеліктері, оны анықтау критерийлері және оның әлеуметтік-экономикалық маңызы жан-жақты талданады. Зерттеуде антикалық дәуірден бастап қазіргі кезеңге дейінгі экономикалық және социологиялық теориялар негізінде орта тап ұғымының тарихи эволюциясы қарастырылады. Авторлар орта тапты тек табыс деңгейі арқылы емес, кәсіби мәртебе, тұрғын үй иелігі, жинақ, білім және мәдени капитал сияқты факторлардың жиынтығы негізінде анықтау қажет екенін алға тартады. Мақалада Қазақстандағы қазіргі жағдай сипатталып, медианалық жалақы, күнкөріс минимумы, тұрғын үй сапасы, жинақ деңгейі және білім көрсеткіштері бойынша статистикалық мәліметтер келтіріледі. Орта тап халықтың небары 10–15%-ын құрайтыны және оның тұрақсыз екендігі атап өтіліп, экономикалық саясатты қайта қарау қажеттілігі көрсетіледі. Халықаралық тәжірибеге сүйене отырып, авторлар Қазақстанда орта тапты нығайту үшін еңбек нарығының тұрақтылығын қамтамасыз ету, қаржылық сауаттылықты арттыру, тұрғын үйге қолжетімділікті кеңейту және шағын және орта бизнесті (ШОБ) қолдау бойынша жүйелі реформалар жүргізудің маңыздылығын баса көрсетеді. Мақалада орта таптың тұрақты әлеуметтік-экономикалық даму мен ұлттық тұрақтылықтың кепілі екені ерекше атап өтіледі.

**Түйін сөздер:** Қазақстан, орта тап, табыс, стратификация, экономикалық саясат, мемлекеттік басқару, қаржылық тұрақтылық.

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## Социально-экономические аспекты идентификации среднего класса: критерии и вызовы

**Аннотация.** В данной статье представлен углублённый анализ формирования среднего класса в Казахстане, критериев его определения и его социально-экономической значимости. В исследовании прослеживается историческая эволюция понятия среднего класса, основанная на экономических и социологических теориях от античности до наших дней. Авторы утверждают, что средний класс следует определять не только по уровню дохода, но и по совокупности таких факторов, как профессиональный статус, наличие собственного жилья, сбережения, образование и культурный капитал. В статье анализируется текущая ситуация в Казахстане с представлением статистических данных по медианной заработной плате, прожиточному минимуму, качеству жилья, уровню сбережений и образовательному уровню. Отмечается, что средний класс составляет лишь 10–15% населения и остаётся нестабильным, что указывает на необходимость корректировки экономической политики. Опираясь на международный опыт, авторы подчёркивают важность проведения системных реформ для укрепления среднего класса в Казахстане, включая обеспечение стабильности на рынке труда, повышение финансовой грамотности, расширение доступа к жилью и поддержку малого и среднего бизнеса (МСБ). В статье подчёркивается, что сильный средний класс является основой устойчивого социально-экономического развития и национальной стабильности.

**Ключевые слова:** Казахстан, средний класс, доход, стратификация, экономическая политика, государственное управление, финансовая стабильность.

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