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Beyond ownership structures: Oil company climate discourses in authoritarian Russia and Kazakhstan

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ABSTRACT

Oil companies play a central role in global climate politics, yet existing research provides a limited understanding of how corporate climate strategies vary across ownership structures and political systems. This article addresses this gap though a comparative study of private and state-owned oil companies in Russia and Kazakhstan. Both are authoritarian states, major global oil producers, significant greenhouse gas emitters, and are highly dependent on fossil fuel exports. Using a most-similar system design, the analysis draws on an extensive range of publicly available corporate documents in English, Russian and Kazakh, to examine how oil companies (private and state-owned) have responded to climate change, and how these discourses interact with national climate agendas. Comparing discursive framings on climate change across countries and ownership types, the findings show that authoritarian state priorities strongly shape climate discourses, overshadowing differences generated by both private and state-owned companies. Unlike their Western counterparts that are driven primarily by financial and reputational interests, in Russia and Kazakhstan, both private and state-owned companies largely align their climate narratives with national political goals, limiting the scope for independent or market-driven climate positioning. Broadly, this article advances understanding of how political context shapes corporate climate behaviour. It demonstrates that in authoritarian fossil fuel states, national politics takes centre stage in structuring corporate engagement with climate change, with important implications for global climate governance.

1. Introduction

Oil companies occupy a central role in the politics of climate change. Through their core activities – extracting, refining, and burning oil – these companies are directly responsible for a significant share of global greenhouse gas (GHG) emissions. At the same time, oil majors often exercise significant economic and political power in the countries where they operate, including over national climate change mitigation efforts [1–3]. However, the literature remains uneven, with limited attention to how oil companies' climate strategies vary across different ownership structures and political contexts.

First, a great deal of this existing scholarship to date has concentrated on privately owned international, predominately Western, oil companies (IOCs). Research has demonstrated how these companies have funded opposition to climate policy [4], promoted climate disinformation [1], and detailed the privileges and influence companies enjoy [5]. By contrast, the literature on state-owned oil companies (SOEs, also known as National Oil Companies, NOCs[1]) is less well advanced, despite their national significance and economic influence [2,6–8]. Yet SOEs differ from IOCs in some important ways. While IOCs are seen to be primarily driven by profit and shareholder accountability, SOEs are regarded as being intertwined with their respective governments, often playing dual roles as both commercial entities and policy instruments [9,10]. Overall, both the literature on IOCs and the limited work on SOEs, treats these two groups separately, thus restricting our understanding of the extent to which ownership type matters when it

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[1] The terms SOE and NOC are used interchangeably in the literature. Here we use SOE which is more widely used in the two case study countries.

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comes to issues such as company attitudes towards climate change and energy transition.

Second, while the global climate regime may be inching towards a world without fossil fuels, international agreements will remain unfulfilled without attention to national-level dynamics around fossil fuels, especially in politically restricted states which are less well studied in the literature in comparison with the Western oil majors. Considering the existing synergies between authoritarianism and the oil industry, and the prominence of authoritarian states in global oil production [11], there is an urgent need to examine the role of these actors in shaping climate politics.

We seek to contribute to these two key gaps in the literature with a comparative study of public-facing climate discourses of private and state-owned oil companies in two understudied, yet critical cases, of Russia and Kazakhstan. Both are authoritarian states, major global oil producers and exporters, and significant GHG emitters with limited national climate policies (e.g. [12,13]). Both countries are also home to a number of large and economically powerful private and state-owned oil companies, which supply domestic and international markets. In our analysis we ask three primary research questions:

1. What discursive strategies do oil companies in Russia and Kazakhstan adopt in relation to climate change?
2. How do these discursive strategies fit within the national climate agendas?
3. Does this vary by country, or by ownership type (state-owned and private)?

Drawing on a large collection of English, Russian, and Kazakh-language corporate documents, we argue that the authoritarian nature of the two fossil fuel exporting states overshadows climate discourses generated by both private and state-owned companies. This finding is particularly important for understanding the behaviour of private companies in both Russia and Kazakhstan and marks a significant divergence from the patterns observed in existing scholarship. Whereas their Western counterparts are predominately driven by the financial interests and public relations agendas, in the context of authoritarian Russia and Kazakhstan, national politics take centre stage.

To explore this, we first discuss the climate politics literature examining oil companies, including the limited work on state-owned companies and the value of our comparative approach. We then examine the literature on the relationship between fossil fuels and the state in Russia and Kazakhstan. In Section 3, we outline the methods and research design used in this study, and present a brief background of the oil sector and climate politics in Russia and Kazakhstan. Section 4 then turns to the analysis of oil company discourses, followed by Section 5 which discusses the implications of our findings and our contribution.

2. Literature review

This literature review situates our study within two distinct bodies of scholarship. First, we examine research on oil companies and climate politics, highlighting both the focus on Western IOCs and limited work on state-owned companies. Second, we consider the literature on the relationship between fossil fuel industries and the state in Russia and Kazakhstan, which provides critical context for understanding corporate behaviour and discursive strategies. This represents an opportunity to bridge two largely separate literatures to better understand how the political context shapes climate narratives of both private and state-owned oil companies.

2.1. Oil companies and climate politics

Oil companies have long been a focus of the climate politics literature. Work has examined a range of different areas, including individual oil company analysis which looks decarbonisation strategies [3,14–17], sector wide efforts to influence the direction of national and international climate and energy policy including through collective governance initiatives [18], as well as the significant effort and resources the oil industry dedicates to climate change disinformation, denial, and obstruction [1,2,4].

As noted however, the focus for these studies has largely been on privately-owned IOCs, predominantly in Western countries. This assumes a particular context in which these companies operate, characterised by incentives to engage (at least discursively) with climate action, while acknowledging that there is often a gap between rhetoric and investment behaviour [15,19–21]. This leaves open the question of how oil companies embedded in different political systems, including authoritarian ones, articulate their position on climate change. As growing research on authoritarianism and climate change has demonstrated, there is a need to consider the distinctive features of regimes when analysing climate policies and discourses (e.g. [22,23]). A key focus for this investigation therefore is to examine how the authoritarian political context shapes corporate discourse on climate.

Further, the focus on privately owned, Western IOCs has obscured the role played by oil companies owned or part-owned by the state (hereafter, SOEs). This is despite the significant share that SOEs have in terms of global oil production and GHG emissions, which makes them critical actors in global efforts to address climate change. As noted, SOEs differ from IOCs in several important ways. While IOCs are typically driven by profit and shareholder accountability, SOEs are more closely linked to their respective governments. This creates a complex duality between their role as profit-seeking commercial entities and policy instruments of the state [9,10,24], and thus potentially blurring the boundary between corporate and state objectives.

The limited literature that has examined SOEs suggests that their responses to climate change and decarbonisation have been limited. Nasiritousi [25], for example, in a sample of the world's top 10 largest oil and gas companies, demonstrates how SOEs are less active on climate change than private companies, with the latter subject to pressure from NGOs and shareholders. In a study of BRICS countries, Jaffe et al. [26] find state-owned company's R&D spending remains focused on oil and gas drilling rather than green energy. While Grasso [2] notes that SOEs 'have not been particularly reactive to the challenges posed by climate change' as they face fewer pressures than IOCs which are the "emerging 'pantomime villains' in the global climate discourse" (p. 110). Grasso [2] argues that this is likely to change, as host states tend to 'delegate' to SOEs a significant portion of responsibility for reducing emissions under Paris Agreement commitments. At the same time however, SOEs decarbonisation options are seen as potentially more limited than IOCs, as they largely depend on host government policies (p. 110). Benoit [6] describes the opportunities for governments to incentivise SOEs to lower emissions, yet acknowledges that weak government commitment to climate change undermines this potential. In sum, existing work argues that SOEs have not been proactive in terms of climate engagement, and their approach is largely shaped by national governments. Yet the lack of comparative work leaves open critical questions about variation in discursive strategies on climate change between IOCs and SOEs. Given the limited empirical work to date, particularly on major oil-producing states like Russia and Kazakhstan, there is considerable scope to examine the specific strategies adopted by SOEs on climate change and how they compare with private companies. This forms the basis for the comparative analysis that follows.

2.2. Fossil fuels and the state in Russia and Kazakhstan

Fossil fuels are central to the economies of both Russia and Kazakhstan, funding government expenditure [27], and underpinning regime stability through the distribution of rents to elites [28–30]. In both cases, hydrocarbon wealth is not only an economic resource, but also a political one. In Kazakhstan, fossil fuel wealth shapes state narratives around economic and political revival and emphasises the

leadership's role in bringing in stability after the turbulent post-Soviet period [31]. Similar patterns can be found in Russia, with oil linked to both national identity and geopolitical power [32]. Together, these dynamics raise important questions over the distinction between state and private ownership in authoritarian contexts, as the state's interest in using fossil fuels to ensure regime stability requires either complete ownership or close control of relevant industries.

Previous research on Russia has pointed to the blurring of lines between state and private fossil fuel companies, driven by heavy state intervention in the economy and close linkages between political and economic elites from state and private companies [22,33]. In this regard, both Russia and Kazakhstan's oil industries exhibit what has been described as 'creeping re-nationalisation' [34], a concept that refers to a gradual process through which a government takes increasing control over private companies or industries without formally declaring them state-owned or fully nationalised. Instead of overt, sweeping actions, this phenomenon involves subtle, incremental steps that effectively place the business under government influence or control. This can happen through regulatory changes, financial interventions, government stake purchases, or other indirect mechanisms.

The relationship between the Russian government and state-owned companies across a broad range of economic sectors is very close, with one study suggesting SOEs are increasingly being co-opted as centres of support for the regime as part of efforts to both centralise and personalise the economy [35]. When it comes to the oil (and gas) sectors, as Overland and Poussenkova [36] note, 'the Kremlin maintains a firm grip … by controlling the largest producers, Gazprom and Rosneft, by setting framework conditions for the operations of other companies and by doling out tax breaks and other privileges to preferred actors' (p. 1). The Russian government, as majority shareholder, has significant control over Gazprom and Rosneft, with strategic decisions such as investment in infrastructure projects and international partnerships, often reflecting state interests. The consolidation of power under Putin since the early 2000s has entrenched this integration, with loyal elites such as Rosneft CEO Igor Sechin, placed in key roles to align corporate and state objectives, thereby institutionalising a tension between political control and market-oriented considerations [12] (p. 47). For instance, Gazprom's pipeline projects, including Nord Stream 2 which was designed to transport gas from Russia to Germany, were designed to serve geopolitical ambitions as well as economic goals, ultimately falling victim to those goals [37–40].

The centrality of oil to the Russian economy also means preferential treatment for both SOEs and private companies. The Russian government has adjusted tax regimes and regulations to ensure the oil and gas sector aligns with broader economic policies, including through measures such as the 'tax manoeuvre' in the oil sector, which seeks to balance state revenue with corporate profitability.[2] Market decisions can also be directly influenced by government agencies, for both formally private and state-owned companies [41]. For example, under pressure from the Russian government at the time of the invasion of Ukraine, Gazprom stopped supplying gas to Europe, sacrificing a long-standing, extensive, and lucrative market in pursuit of political objectives [42].

Similar to Russia, the government of Kazakhstan steers the actions of private oil and gas companies to align with national interests and influences corporate decisions regarding co-operation with private capital. This manifests in several ways including, for example, with local content requirements,[3] where the government mandates that companies prioritize local suppliers and workforce in their operations. State influence is also evident through Production Sharing Agreements (PSAs), with the government playing a significant role in negotiating terms with private oil companies, influencing how profits are shared, and how investments are made [43]. Finally, strategic asset management further extends state influence. For example, sovereign wealth fund Samruk-Kazyna holds shares in private and state-owned companies and can impact corporate governance and strategic decisions [44]. Yet while this literature provides a rich account of state influence over both private and state-owned companies, we know little about how these political arrangements shape company engagement with climate change narratives. The following section outlines the research design and methods used to examine this issue in detail.

3. Case background, research design, and methods

In this analysis of climate politics in authoritarian states and the role of state-owned and private companies, we adopt a comparative, case study approach [45] to examine Russia and Kazakhstan. The study follows a most-similar systems logic, with the two country-level cases sharing key structural characteristics. They are major oil producers, albeit at different scales (see Section 3.1), with a heavy dependence on hydrocarbon revenues. Both have authoritarian political systems, with strong state involvement in the energy sector. Finally, as discussed in Section 3.2, both countries have been criticised for inconsistent or even superficial climate policy.

At the same time however, the cases differ in their degree of openness and relationship with the West. Kazakhstan has the strong presence of Western companies and is more integrated into the global economy, while in Russia, relations with the West have collapsed since the invasion of Ukraine in 2022 which resulted in strong economic and political sanctions. Comparing corporate climate discourse across these two cases enables us to explore how these discourses are shaped within broadly similar authoritarian political and economic structures, and how differences in international openness and changes to this over time are reflected in the construction of climate discourse.

3.1. The oil sector in Russia and Kazakhstan

Russia and Kazakhstan are both significant oil producing and exporting states. Russia is the world's third largest oil producer, accounting for 11% of total global production in 2023 [46]. While Russia's energy sector has seen notable shifts in the past few decades, oil production remains a central component of its economy. In 1995, oil production stood at 310.75 Mt, increasing to 548.52 Mt by 2022, despite fluctuations in overall energy production and consumption (Table 1). Following Russia's invasion of Ukraine in 2022, Western countries imposed sanctions on Russian oil, prompting Russia to reorient its exports to Asian markets (particularly China and India), but without substantially altering production levels [47].

Kazakhstan is also a key player in global oil markets, ranking as the 13th largest producer in 2023 and accounting for just under 2% of total global production [46]. Kazakhstan is a resource-rich country with a robust energy sector which has experienced significant economic growth over the past three decades. As outlined in Table 2, Kazakhstan's oil production has grown steadily, from 25.80 Mt in 1990 to 89.98 Mt in 2022, reflecting the country's expanding role as an energy exporter. Both countries saw sharp drops in oil production in the early 1990s due to the economic instability associated with the Soviet Union's collapse in 1991,

[2] Decree of 29 November 2014 1274, which was aimed at reducing the level of taxation on oil exports and certain categories of petroleum products as part of a "large fiscal maneuver". Order of 3 January 2014 2. The amounts of the coefficients applied in the formulas for calculating the export customs duty rate on crude oil, which are specified in article 31 of the Law of the Russian Federation "On the customs tariff", vary by: 0.59- from 1 January to 31 December 2014 inclusive; 0.57 from 1 January to 31 December 2015 inclusive; 0.55 from 1 January 2016.

[3] Law of the Republic of Kazakhstan dated July 4, 2009, No. 165-IV, On Support for the Use of Renewable Energy Sources.

Table 1
Russia's general country profile.

Year	Energy production (TWh)	Oil production (Mt)	Energy consumption (TWh)	GDP (billion USD)	GHG Gt CO_2e (gigatonnes of CO_2 equivalent)
1990	12,360.11	515.89	9246.80	517.01	3.29
1995	9690.80	310.75	6898.25	395.54	2.03
2000	10,413.28	326.65	6357.38	259.71	1.78
2005	12,576.91	474.82	6591.73	764.02	1.88
2010	13,755.62	512.32	6897.14	1208.10	2.31
2015	14,167.13	544.55	6970.46	1364.27	2.35
2020	16,563.60	524.37	6961.05	1490.36	2.23
2022	15,970.91	548.52	6927.51	2240.18	2.29

Source: [48].

Table 2
Kazakhstan's general country profile.

Year	Energy production (TWh)	Oil production (Mt)	Energy consumption (TWh)	GDP (billion USD)	GHG Mt CO_2e (million tonnes of CO_2 equivalent).
1990	962.92	25.80	837.64	22.94	268.17
1995	608.55	20.63	573.86	31.18	168.29
2000	902.33	35.32	347.48	33.94	143.38
2005	1317.46	61.49	485.01	47.86	200.04
2010	1582.97	79.68	512.12	66.69	248.80
2015	1831.55	79.46	616.75	76.88	278.66
2020	1645.40	85.66	680.20	97.15	255.49
2022	1908.20	89.98	732.10	112.81	271.18

Source: [48].

with corresponding declines in GHG emissions, but production has since recovered, with emissions rising in parallel (Tables 1 and 2).

The oil sector in both states is dominated by a mix of state-owned and private oil companies, with the balance between the two fluctuating over the period since 1991 which saw the break-up of the Soviet oil industry. In Russia in the 1990s, some of the most desirable parts of the oil industry were privatised, leading to the creation of companies including Lukoil, Surgutneftegas, and Yukos. The state kept the remnants, which were 'gathered together as a state company under the name of Rosneft' (p. 53) [12]. Then, in the 2000s under Putin, a recentralisation of the industry by the state began, including the absorption of Yukos by Rosneft and the imprisonment of Yukos CEO Mikhail Khodorkovsky. Rosneft now dominates the sector, responsible for 38% of total production in 2020 [12]; though trusted private companies such as Lukoil with close links to the Kremlin also play a role.

Kazakhstan's oil industry underwent a similar period of privatisation in the 1990s, and focused on attracting foreign direct investment (FDI) to the sector (p. 330) [49]. This resulted in the signature of a number of PSAs with foreign oil majors including Chevron and Mobil [50]. As with Russia, the government then sought to increase state activity in the sector in the 2000s, creating the state-owned KazMunayGaz (KMG) for example.

3.2. Climate policy in Russia and Kazakhstan

Russia's climate policy development has been limited at both the domestic and international levels. While several policy documents have been produced including the Climate Doctrine (released 2009, updated 2023), as well as various GHG emissions reduction regulations and targets, none provide the foundation for substantive action. As Korppoo and Alisson [51] note, domestic climate policy measures "tend to be vague and 'ghosted' after adoption, remaining unimplemented without further development or measures" (p. 6). Internationally, Russia has a reputation as being a reluctant and often obstructive actor in climate negotiations, delaying its signature of the 1997 Kyoto Protocol for several years, and taking a similar approach with the 2016 Paris Agreement, whereby resistance from fossil fuel actors prevented ratification until 2019 [52].

Russia's full-scale invasion of Ukraine in 2022 has also affected its climate change policy and initiatives. Despite earlier concerns, Russia continues to engage with the international climate process, remaining a signatory to the Paris Agreement and retaining its commitment to reach carbon neutrality by 2060. However, disengagement with Western partners stalled several international projects on carbon reduction and renewables development. Furthermore, key stakeholders within Russia have made claims that the sanctions regime is the 'end of the green agenda' [22], pointing to a potential policy shift in the future and explored in more detail below.

Although Kazakhstan has engaged in international climate change dialogue since 1995, this has not always translated into strong national policy [53]. Kazakhstan only ratified the Kyoto Protocol in 2009 (despite being a non-Anex 1 party), becoming the last signatory party to do so [54]. In 2010, it adopted a law 'on Amendments to Certain Legislative Acts of the Republic of Kazakhstan Relating to Environmental Issues' establishing a foundation for carbon trading and the development of Joint Implementation projects. Kazakhstan has set ambitious targets to increase the share of renewable energy in its electricity mix from 3% in 2020 to 50% by 2050 and improve energy efficiency within industry by 50% by 2050, reflecting a significant shift in its climate and energy policy [55]. In its attempt to meet these ambitious targets, the government has established a Green Economy Council within the Ministry of Energy and developed legal and institutional frameworks to support this transition [56,57].

Kazakhstan signed and ratified the Paris Agreement in 2016, well before Russia. However, despite strong economic recovery in the post-Soviet period and a thriving fossil fuel industry, it has taken an approach common among developing and least developed countries, setting a modest 'unconditional' target of a 15% reduction in GHG emissions relative to the 1990 baseline and a 'conditional' target of 25% which relies on external support [58]. Ultimately, both countries show ongoing contradictions within their national climate policies, whereby economic agendas and geopolitical goals often trump ambitious climate policy.

3.3. Company selection

In our analysis, we take a sample of four major oil companies from each state: two private and two state-owned. The companies chosen for analysis are set out in Table 3. In Russia, the companies are the four largest producers. In Kazakhstan, KMG and Tengizchevroil are the largest producers (approximately 34% of market share), while Karazhanbasmunay and South Oil are the largest private producers (approximately 2% of market share). This selection provides a balanced representation of both state-owned and private oil sector actors, allowing for a comprehensive analysis of their roles and strategies within the context of each country's energy industry and climate politics.

Table 3
Companies selected for analysis.

Ownership	Russia	Kazakhstan
SOE	Rosneft Gazprom Neft	KazMunayGas (KMG) Tengizchevroil
Private/quasi-private[a]	Lukoil Surgutneftegaz	Karazhanbasmunay South-Oil

[a] As discussed in Section 2.2, the state-owned/private distinction is not as clear cut in the context of Russia and to a lesser extent, Kazakhstan. For simplicity however, we refer to the two ownership types as private and SOE in the text.

In Russia, Rosneft dominates the market with a 42.4% share in oil production, more than twice that of Lukoil at 19.8%. Gazprom Neft and Surgutneftegaz hold smaller shares of 12.5% and 10.6% respectively (Table 4), according to company reported data. Over the decade from 2010 to 2020, Rosneft generated the highest total revenue at 90.7 billion roubles. Rosneft also leads in GHG emissions.

Similar to Russia, Kazakhstan's oil production landscape is dominated by a single company, KMG, which reflects its higher GHG emissions. As Table 5 demonstrates, KMG, Tengizchevroil, Karazhanbasmunay, and South-Oil have average annual oil productions of 23.56 Mt, 7.8 Mt, 2.1 Mt and 1.4 Mt, respectively, according to company data.

Although Rosneft demonstrates the highest absolute investments in clean technologies between 2005 and 2020 (6.10 million roubles, Table 4), this figure obscures differences when adjusted for company size and impact. When assessed as a share of revenue, Rosneft shows the lowest relative investment intensity due to its disproportionately high revenue base, while Gazprom Neft emerges as the leader among Russian producers, allocating a larger proportion to green projects. Lukoil and Surgutneftegaz fall between the two. In Kazakhstan, Tengizchevroil achieves higher ratios than state-owned KMG. A similar pattern emerges when normalizing by oil output and GHG emissions: Gazprom Neft leads among Russian producers, with Rosneft showing the lowest relative performance.

3.4. Discourse analysis and document analysis

As Jorgensen and Phillips [68] highlight 'with language, we create representations of reality that are never mere reflections of a pre-existing reality but contribute to constructing reality' (p. 10). Hence, we argue that it is important to understand discursive strategies of these key oil companies as they not only reflect the national and international power dynamics in relation to climate change mitigation efforts, but also become sources of power impacting (at the very least) national agendas on climate change, and to some extent, international debates too.

In our study, we gathered corporate documents including environmental reports (ER), corporate social responsibility (CSR) reports, and annual reports (AR), which were used to identify strategies and discursive framings on climate change. Corporate reporting is a valuable source of data for understanding the image which companies wish to convey to external actors, including investors, stakeholders, and other audiences [69]. However, we note a key limitation: these materials reflect official narratives and data produced by companies and thus only capture elite discourse. This focus is deliberate, as our aim is to analyse how corporate and state-linked actors frame climate issues, rather than to represent broader societal debates or alternative narratives from NGO or more critical media outlets.

In total, over 139 English, Russian, and Kazakh language documents were examined (Table 6), covering the period from 2015 to 2024. We selected 2015 as the starting point as the Paris Agreement that year prompted more pronounced climate policies in both countries. To supplement and triangulate the document analysis, we also reviewed news articles mentioning the selected companies and climate change in two major media newspapers in Russia and in Kazakhstan (one official state newspaper and one business-oriented): Rossiyskaya Gazeta and Kommersant (Russia); Kazakhstanskaya Pravda and Forbes Kazakhstan (Kazakhstan).

As Table 6 demonstrates, there is considerable variation between companies in the volume of information available. Comprehensive companies were those with full sets of reports available over the period of study, providing detailed insights into their environmental and social governance (ESG) practices. We found four companies had limited reporting, resulting in restricted visibility into their strategies and initiatives. This included 3 of 4 Kazakhstani companies. From the perspective of state-owned vs private companies, 3 of 4 state-owned companies had comprehensive coverage, while only 1 private company (Lukoil) had extensive coverage of its climate and related activities.

These variations in reporting are partially explained by the existing legislative framework and national expectations. Kazakhstan has less requirements regarding CSR compared to Russia [71], largely due to the weaker institutionalization of sustainability governance and the more limited integration of Kazakh energy companies into global sustainability-related financial and regulatory frameworks. Russian companies face greater expectations around transparency and accountability, partly due to their deeper integration into global

Table 4
General profile of oil companies in Russia according to company data. Sources: [59–62].

Indicators	Gazprom Neft	Rosneft	Lukoil	Surgutneftegaz
Total market share in oil production, %	12.5	42.4	19.8	10.6
Average annual oil production, Mt	59.1	195.5	81.2	58.4
Total revenue 2010–2020, bln roubles	24.5	90.7	54.3	71.8
GHG emissions 2010–2020, Mt	228.1	790.5	346.7	365.9
Investment in clean technologies 2015–2020, bln roubles	5.60	6.10	5.80	3.70

Table 5
General profile of oil companies in Kazakhstan according to company data.

Indicators	KMG	Tengizchevroil	Karazhanbasmunay	South-Oil
Total market share in oil production, %	26.6	6.5	1.1	0.53
Average annual oil production, Mt	23.5	7.8	2.1	1.4
Total revenue 2010–2020, bln KZT (Kazakhstani Tenge)	15.60	3.1	2.8	1.7
GHG emissions 2010–2020, Mt	78.4	25.2	5.48	4.62
Investment in clean technologies 2015–2020, bln KZT	1.25	0.45	0.10	0.06

Sources: [63–67].

Table 6
Overview of data by company.

Company	Comprehensive (C) or limited communication (L)	Number of documents examined	Timeframe covered by documents
Rosneft (SOE)	C	30	2015–2024
Gazprom Neft[a] (SOE)	C	38	2015–2023
Lukoil (Private)	C	14	2015–2023
Surgutneftegaz (Private)	L	4	2020–2023
KMG (SOE)	C	23	2015–2023
Tengizchevroil (SOE)	L	14	2015–2023
Karazhanbasmunay[b] (Private)	L	9	2018–2023
South-Oil (Private)	L	7	2020–2023

[a] Gazprom Neft reports available from 2015 to 2020. From 2020 onwards, Gazprom Group reporting is combined as noted in Gazprom [70].

[b] Owned by CITIC Resources Holdings which is part owned by Kazakhstan government. CITIC reports are examined here as Karazhanbasmunay do not produce their own CSR reports, therefore the information contained in CITIC reports covers all CITIC subsidiaries (oil and gas, and non-oil and gas).

markets, including the European Union, at least until 2022. These international partnerships and investments often come with heightened scrutiny from stakeholders, investors, and business partners who prioritize ESG standards (e.g. [72,73]), at least on paper, while acknowledging challenges with compliance and enforcement. Since 2022, evidence points to a reduction in ESG commitments, and a realignment in strategy towards local priorities and domestic ratings rather than international standards [74].

The documents were coded using NVivo software by a single researcher to ensure consistency across cases, with other team members cross-checking the results. Coding followed an iterative process. Initially, open coding of the documents was undertaken to identify initial concepts, with text broken down into broad categories (including for example 'internal company action', 'domestic policy engagement', 'international engagement'). Coding decisions were guided by a codebook developed during the early stages of the process, and refined as new categories and concepts emerged. The initial categories were then organised, by looking for patterns within and relationships between the categories identified. Throughout, we moved between the data, codes and relevant literature on climate discourse [75–77] to refine and validate the discourses. Four core discourses were identified and are discussed in detail in Section 4. As the documents were in English, Russian, and Kazakh, coding was conducted in the documents' original language where possible. Key passages and thematic extracts were translated by the multilingual research team to ensure accuracy and maintain contextual meaning across languages.

4. Findings: oil companies and discourses on climate change

This section presents the findings from our analysis. Before examining corporate discourse, we note that the companies identified above as having limited reporting (see Table 6) provide only partial information, reducing the depth of climate-related discussion. For example, Karazhanbasmunay covers the physical and environmental risks of climate change for the company but omits details on policy engagement or external participation in climate-related issues that companies with comprehensive reporting have. Similarly, Surgutneftegas's 2023 SR identifies climate change as a physical risk, but focuses narrowly on APG (associated petroleum gas) utilisation and energy efficiency without detail on issues such as GHG reduction. Finally, Tengizchevroil, reports on CSR and environmental issues, yet does not mention climate change at all in some years (2015–16; 2019–20; 2023) and only briefly in other years.

The companies' discursive positions on climate change (or a lack thereof), reflected in their corporate reporting, serve as important agenda-setting tools that can either reflect or impact national climate discussions and policy. To explore this in more detail, we turn now to the four discourses: 'Climate change as an opportunity', 'Oil companies as good global climate citizens', 'Oil companies as good national citizens' and 'Climate action as a victim of geopolitical shifts'. Importantly, we note that the categories can overlap, as the discourses are neither mutually exclusive nor necessarily contradictory. The idea is that company perception of climate change is complex, and breaking down the different discourses helps us build a more comprehensive picture.

4.1. Climate change as an opportunity

Our first discourse reveals how oil company communication frames climate change as an opportunity. This took a variety of different forms but was dominated by the perceived economic opportunities around natural gas development, the gains from introducing climate-related efficiencies into production processes, and a broader argument about the essential role for oil in the global economy for the foreseeable future.

The growing global trend towards lower-carbon energy alternatives to oil was presented as an opportunity by four of the companies to expand their gas production. Rosneft, for example, noted that it was 'changing its production structure in favour of more environmentally-friendly products, increasing natural gas production and expanding its share in total hydrocarbons production' (p. 74) [78]. Gazprom Neft stated that 'developing gas projects will reduce the carbon intensity of company products' (p. 98) [79], while KMG similarly claimed that the role of gas would grow as companies sought to reduce emissions, noting 'development of the gas-related area of the business is one of KMG's strategic goals' (p. 99) [80]. In this context, the narrative appears in company reporting from 2018 onwards and it remains central across both SOEs and private companies, though its presence is of course dependent on the nature of company operations and whether they have existing gas production. In the Russian case, we expect the framing of gas as a transition fuel may shift in the future. Due to the impact of sanctions and severed relations with the West, Russian gas export revenue has substantially declined [81] to the extent that Gazprom suffered a record net loss for the first time in 25 years [82].

In this discourse, climate action was framed as economically advantageous. Companies presented efficiency improvements, renewable energy adoption, and the utilisation and monetisation of APG as sources of productivity and profit. Gazprom Neft demonstrated this position by noting that 'energy efficiency is one of the key tools to reduce greenhouse gas emissions and climate impact' (p. 106) [79], similarly Lukoil considers 'improving energy efficiency and the optimal use of energy resources among the main measures to reduce controlled GHG emission' (p. 36) [83]. This was an early focus for oil companies examined as they started to engage with the climate agenda in the post-Paris era. KMG for example developed a 'Road Map for Energy Saving and Energy Efficiency Improvement' in 2016 (p. 48) [84].[4]

APG utilisation was also a central aspect of studied communication, with companies reporting utilisation rates, setting targets in line with domestic legislation, and referencing international norms. In Kazakhstan since 2015, for example, both KMG (p. 26) [85] and Tengizchevroil (p. 14) [86], have been actively involved in projects aimed at capturing, processing, and using APG, while Russian companies act in accordance with government targets to limit APG flaring [87].

Overall, these narratives fed into a wider argument that oil would remain fundamental to the global economy for decades to come. Highlighting this, CITIC (owner of Karazhanbasmunay) commented: 'while ensuring a stable and abundant energy supply, it is imperative to make concerted efforts to achieve a reduction in carbon emissions within the energy system, aligning with the prevailing trend of sustainable development' (p. 15) [88]. Language employed by companies calls for a 'balanced' approach and gradual reduction of emissions. There was a strong emphasis on technological solutions to mitigate this continued demand for oil, including carbon capture and storage (CCS), across all cases. KMG for example highlighted this in 2023, noting 'oil and gas companies will play a key role in accelerating energy transition by investing in energy systems of the future' (p. 50) [89]. Similarly, a Rosneft press release describes how the company was focused on CCS to reduce emissions, while also engaging with forest projects to offset 'unavoidable emissions' [90].

4.2. Oil companies as good global climate citizens

The idea of being good global climate citizens featured prominently across most companies, as companies emphasised they were proactively undertaking mitigation activities and engaging with the global community through international partnerships and transparency initiatives. Yet, despite this, according to the data, no companies admitted to the disproportionate role that oil industry had in contributing to climate

[4] The Road Map includes initiatives such as upgrading equipment to more energy-efficient models, implementing advanced monitoring and control systems to reduce energy waste, and adopting best international practices for energy management.

change, with the exception of Lukoil [91]: 'Energy companies' operations generate significant amounts of greenhouse gas emissions, which can impact climate […] we share the world's concern about climate change' (p. 32).

Interestingly, corporate reporting demonstrates an evolving understanding of climate change, including from around 2020 onwards where it becomes evident that decarbonisation trends are firmly embedded within the global economy and companies need to respond in some way. Rosneft provides a clear example of this evolution. In documents from 2015 to 2016, the company did not make explicit references to 'climate change' or related terms (global warming, decarbonisation, energy transition) focusing instead on energy efficiency, APG, and efforts to reduce air pollution. Then in 2017 we see a discursive shift: these same activities are explicitly referenced as part of the company's 'climate change efforts'. The substance of initiatives did not substantially change, but the framing did. Rosneft explicitly states that this is due to external pressure from investors, noting that as 'ESG investing matters are in the spotlight for both current and potential investors, Rosneft is determined to make major improvements to the way it communicates them to external stakeholders in 2018' (p. 35) [92].

All companies surveyed, except South Oil which as noted had limited reporting, had GHG targets and decarbonisation programs in place, with companies referring to both international and national measurement standards.[5] Overall, we found companies demonstrated international engagement in three ways. First, there was an emphasis from proactive companies (Gazprom Neft, Rosneft, KMG and Lukoil) on support for the Paris Agreement [93,94]. Second, companies demonstrated engagement with several international climate partnerships and transparency initiatives, including: the Oil & Gas Decarbonisation Charter (Lukoil, KMG); the Carbon Disclosure Project (Lukoil, KMG, Rosneft, Gazprom Neft); UN Global Compact; the Global Methane Initiative; and the World Bank initiative 'Complete cessation of regular flaring of APG by 2030' (KMG, Lukoil). One notable finding was the evolution of this narrative for Russian companies since February 2022, with companies keen to emphasise that, despite challenging circumstances, they remained committed to reducing emissions and addressing climate change. Lukoil demonstrates this when it noted, 'despite the changing geopolitical situation and actively discussed energy security in 2022, many countries around the world, including Russia, continued to meet national GHG emissions reduction targets' (p. 23) [95].

Finally, companies sought to highlight their investments in renewables, clean technology, and a range of related programs. In Russia for example between 2015 and 2020, Gazprom Neft invested 5.6 billion roubles and Surgutneftegas invested 3.70 billion roubles in clean technology according to company data. In 2022, Lukoil successfully commissioned a total of 20 MW of solar power projects, and made a significant entry into the wind energy sector with the development of a 60 MW wind power plant in Kazakhstan [61]. In 2021, Rosneft approved the *Rosneft-2030: Reliable Energy and Global Energy Transition* strategy, with a goal to achieve net carbon emission neutrality by 2050 [96,97]. In Kazakhstan, KMG introduced a Low-Carbon Development Program for 2022–2031 aiming to decrease the energy and carbon intensity of production by at least 10% and reduce direct and indirect CO_2 emissions by 15% by 2031. In its corporate report from 2018, TengizChevrOil claims to have reduced emissions by 76%, reused 43% of its waste and recycled 43% of its water, and reduced gas flaring by 96%. Between 2015 and 2020, South-Oil invested 0.06 billion Kazakhstani Tenge in clean technologies and in 2023, signed a contract with a Chinese power corporation to construct a 72 MW hydroelectric power station and water cascade for mini-hydro plans in the Turkestan region of Kazakhstan [98,99]. Note however, it is not the intention of this paper to comment on the *ambition* of these programs and targets nor whether they are achieved, but rather how these efforts are central to corporate communication. We return to this question in the discussion.

4.3. Oil companies as good national citizens

In contrast to the *global* citizen narrative which linked all companies examined, the notion of companies being good *national* citizens on climate action was a feature unique to SOEs (with one exception) and indicates an area of discourse that distinguishes state-owned from private oil companies. This discourse is built around two core narratives.

First, we find an overlap between company and state interests, as companies position themselves as representing the state's agenda on climate change. KMG provides a clear illustration of this idea: 'KMG will contribute to the diversification of the national economy and reduce the carbon footprint of the Republic of Kazakhstan, thereby contributing to the growth of the Company and the well-being of Kazakhstanis, as well as preserving the environment for future generations' (p. 48) [100]. Tengizchevroil makes similar claims, with the General Director aligning company mission with the country, noting that Tengizchevroil 'has been creating value for Kazakhstan by operating responsibly, meeting its production commitments to the Republic of Kazakhstan…and supporting the country's economic progress' [101]. Russian companies also share this position, with Gazprom Neft noting 'as a state-owned company, PJSC Gazprom is guided by the climate goals set by the Russian Federation' (p. 80) [70].

Second, SOEs talk about their engagement with state actors in the development of climate policy to a much greater extent than private companies, with the exception of Lukoil. Kazakhstan's KMG for example notes they 'take an active part in improving the country's regulatory legislation in this area' (p. 44) [84], with the company 'part of the Kazenergy and Ministry of Energy working groups drafting a new Ecological Code' (p. 98) [80]. In Russia, Gazprom highlights its role in drawing up the legislative framework for the 'draft law On Limiting Greenhouse Gas Emissions' (p. 80) [70]. Rosneft too, lists a range of climate policy related activities it is involved in. For example, in its 2022 report, Rosneft took part in discussions with government on the development of regulations for the Law on GHG Emissions as well as participating 'in the work of interdepartmental advisory and coordinating bodies set up to resolve climate issues' (p. 55) [102] while in 2023 'the Company took part in putting together a plan to implement the [Low-Carbon Development Strategy of Russia until 2050]' (p. 59) [103]. As evident from the corporate communications examined, the state-owned entities have high level access to government officials suggesting a close alignment of interests and potential avenues for influence over the policymaking process to occur.

As noted, Lukoil is an exception among private companies in communicating its perceived role as a good national citizen. For example, as early as 2015 and therefore before the other companies surveyed, Lukoil emphasised its participation in GHG emissions reduction policy discussions (p. 49) [104]. In its 2018 CSR report, the company discussed global climate politics and Russian policy developments, commenting that it 'supports the position of the [Russian Federation]' (p. 54) [105]. Other documents point to engagement in a variety of policy issues, including 2021 involvement in 'shaping Russian legislation in connection with the adoption of the Federal Law [on GHG Emissions]' (p. 28) [83].

4.4. Climate action as a victim of geopolitical shifts

This final category was both recent and unique to the Russian cases, featuring in three of the four Russian companies examined and only in the post-February 2022 period. This discourse is similar to the 'oil will remain essential' idea raised in the first narrative, yet takes it a step further in light of Russia's conflict with Ukraine, arguing that

[5] The slow development of GHG regulation in Russia led to some Russian companies acting in advance of government legislation, introducing their own voluntary mechanisms for measuring and reporting GHG emissions or drawing on international practices. See [73].

geopolitical conflicts will undermine or potentially derail action on climate change. Sanctions are identified as a risk to Russian oil companies (e.g., [70]) particularly through their impact on imported equipment prompting the need for 'strengthening technological sovereignty' (p. 22) [106].

The idea of reorienting resources towards Asian markets, particularly China, in light of Western sanctions was a central part of this narrative. Notably, Russia's China focus extends beyond just increasing oil exports to also include cooperation in the sphere of decarbonisation, with Rosneft for example highlighting engagement with China on low-carbon development in its 2023 Sustainability Report. Rosneft also points to the 'geopolitical tensions' that have emerged since 2022 and the 'ongoing geopolitical shift towards a multipolar world' (p. 50) [103]. The company argues there is a need to re-assess the prospects for the energy transition and, in doing so, present a new scenario forecast on global decarbonisation. This is termed the 'Geopolitical Shift Scenario' as opposed to the 'Global Energy Transition Scenario' (p. 50) [103], as demonstrated in Table 7 below. Rosneft notes that the likelihood of the second scenario, which would meet the goals of the Paris Agreement and limit warming to below 2 °C is reduced due to 'the escalation of geopolitical tensions worldwide and associated deglobalisation and fragmentation processes' (p. 52) [103].

Interestingly, Rosneft CEO Igor Sechin, has described the energy transition as a form of 'neocolonialism', led by the West to undermine developing economies, and a form of 'energy war' [107]. Sechin has also previously stated "that sanctions have ended the green transition as countries try to find alternative sources of hydrocarbons to replace Russian ones, with Europe committing 'energy suicide' in doing so" (p. 230) [22]. Evidently, Sechin's public commentary is much more strident than the company communications examined here, though is available through Rosneft's website. It points to a dual strategy in terms of this discourse. The corporate documents examined project a toned-down, and diplomatically more balanced version for international stakeholders. Yet Sechin's public comments reflect a more ideological narrative aimed at a domestic political audience.

In contrast to Russia, we did not find significant changes in discourse in Kazakhstan in the post-2022 period. This could be explained by Kazakhstan's position of 'neutrality' towards the war in Ukraine, and careful efforts to balance relations with Russia and the West [108].

Table 7
Comparison of scenario forecasts developed by Rosneft for the period up until 2050.

Indicator	Geopolitical shift scenario	Global energy transition ("below 2 °C") scenario
Global GDP	2.2× growth	2.1× growth
Energy consumption	Growth by 22%	Decline by 7%
Oil consumption	Growth by 5%	Decline by 41%
Natural gas consumption	Growth by 34%	Decline by 18%
Coal consumption	Decline by 26%	Decline by 80%
Consumption of new renewables	5.7× growth	8.4× growth
Share of fossil fuel in the global energy demand (in 2021: 80%)	Decline by 12 p. p.	Decline by 35 p.p.
Share of hydrocarbons in the global energy mix (in 2021: 53%)	51%	40%
Share of renewables in the global energy mix (in 2021: 3%)	13%	25%
Key driver behind growth in the global consumption of primary energy	Population growth and higher energy supply per capita in developing nations (primarily in Asia-Pacific)	
Additional average annual investments	–	USD 2 trillion higher compared to the Geopolitical Shift Scenario
Goals of the Paris Agreement	Not met	Met

Source: [103].

Further, as we note above, Kazakhstan's energy sector is more integrated into the global economy, with strong participation from Western firms. We expect that this encourages a more pragmatic approach to climate discourse, avoiding the politicised elements found in the Russian case. However, Kazakhstan remains firmly within the authoritarian political sphere and close to Russia, so we may see discursive shifts that more closely resemble the Russian case in the future.

5. Discussion

This study extends existing research on corporate climate politics in two core ways: by examining how climate discourses are constructed within authoritarian contexts, and by comparing SOEs and private companies. In doing so, our analysis provides two key insights. First, of the four discourses identified, both the 'climate as opportunity' and 'good global citizens' narratives align broadly with what we know about (predominantly Western) oil company responses to climate change from the existing literature, and were shared by both the private and SOEs, across both countries. These findings suggest a high degree of convergence between authoritarian and democratic contexts in how fossil fuel producers frame their climate engagement. For example, the emphasis on technology, CCS, and the promotion of gas as a lower-carbon alternative to oil or a 'transition fuel' by fossil fuel actors and governments corresponds with the existing literature and is widely considered a form of climate delay or obstruction [109–111]. Similarly, oil companies promoted their proactive engagement with global action on climate. Scholarly opinion remains split over whether this desire to signal participation in global climate dialogues ultimately advances or undermines substantive national climate efforts. On the one hand, arguably, companies that consistently engage in global dialogues may eventually introduce real changes to their carbon footprint and contribute to national climate strategy. On the other hand, these efforts could remain at the level of PR campaigns without translating into meaningful corporate action.

Another illustration comes from the discursive narrative of 'climate as opportunity'. Both Russia and Kazakhstan have promoted this 'win-win' approach in their national climate policies. Climate mitigation efforts focused on advancing energy efficiency are predominately seen as a means to strengthen economic stability, while measures introduced in response to domestic or international climate commitments do not suggest slowing down fossil fuel production (e.g. [53,87]). Admittedly, in some cases this understanding of climate change related opportunities (e.g. energy efficiency, investments, publicity) could indeed be seen as a 'co-benefit' of climate related efforts, yet in our case it essentially represents a form of climate delay (e.g. [111]) or climate obstruction [22], given the broader focus on continued fossil fuel production in both states. Taken together, these two discourses demonstrate the persistence of familiar oil company narratives within authoritarian settings, which underlines how deeply entrenched these ideas are across the fossil fuel sector, regardless of regime type.

Second, however, the 'good national citizen' and 'geopolitical shifts' discourses mark a clear departure from this pattern of convergence, illustrating how discursive framings shift within restricted political regimes. In these narratives, companies prioritised loyalty to the government and alignment with the national interest over independent corporate interests. This pattern is consistent with the limited existing work on SOEs, which tend to mirror national objectives rather than market logic (e.g., [2]), yet our findings suggest that this dynamic can also extend to private firms in authoritarian contexts. This suggests that the authoritarian political context can overshadow ownership differences, thus challenging existing understandings of the distinction between SOEs and private companies.

Our findings align with Skalamera's [112] observation that even 'green' or sustainability-focused developments do not challenge '"old' oil and gas activities" in authoritarian contexts (p. 2). Our evidence supports and expands this notion: while rare exceptions such as Lukoil

may show that some discursive independence is possible for well-resourced private companies, the broader pattern demonstrates that the authoritarian state's political agenda remains dominant, ultimately compelling even these outliers to eventually acquiesce or align. Thus, oil companies in authoritarian regimes are more likely to align with state climate narratives, devise their discursive strategies with geopolitical considerations in mind, and are substantially impacted by the desire to maintain favourable relations with the state, including to secure profitable contracts and subsidies [36].

Building on this, our discourse analysis indicates that both Russian and Kazakh oil companies frame climate change in ways that reflect the countries' commodity-oriented economies and strong reliance on fossil fuel exports, thereby aligning closely with national climate agendas. Despite their authoritarian political structures, both states remain responsive (at least to some extent) to world energy markets, including continued demand for oil. Domestically, this creates vulnerabilities through the reliance of both states on fossil fuels revenues to ensure relative socio-economic stability, while at the same time, the revenue generated is susceptible to elite capture. These elites are more interested in preserving the current economic structure than allowing diversification and a genuine green transition [113]. Thus, we argue that in authoritarian states, there is an additional layer of complexity as the distribution of assets and incomes from oil also ensures regime stability, making a transition away from fossil fuels even less likely than in democratic settings.

Importantly however, the authoritarian nature of the state does not mean a homogenous approach to climate change by either SOEs or private companies. Instead, the discourses become attuned to the priorities and self-interest of the state and its political leaders (e.g. [114]). As an illustration, prior to February 2022, Russia's main fossil fuel trading partner was the EU. This meant that national stakeholders, including oil companies (both private and SOEs), had to play by the rules of the international community and engage with climate change discourse. As discussed in Section 4.2, companies initiated a range of programs and investments in clean technology during this period. While evaluating whether these investments had a tangible impact on GHG emissions is beyond the scope of this analysis, it indicates the strategic use of climate-related initiatives to align with political expectations, which, in this instance, involved reinforcing state priorities while also signalling a responsiveness to international climate norms. However, as demonstrated above, company alignment with the state's agenda has always been a priority. Hence, after the start of the full-scale war in Ukraine, Russian oil companies did not disengage with the international agenda completely, yet they adjusted their climate narratives, in some cases acknowledging the limitations imposed by the sanctions and in others, responding to the perceived 'geopolitical shift'.

In Kazakhstan, its pursuit of a multipolar approach and ongoing efforts to maintain diplomatic and economic relations with the West, create a somewhat different situation. On the one hand, Kazakhstan's companies showed slower and less explicit engagement with climate change related narratives, reflecting the state's slow development of national climate policies. On the other hand, alongside government support, Kazakhstan's energy industry continues to rely on direct foreign investments. Hence, external pressure from investors and international bodies, and the potential reputational damage of failing to engage with the climate change agenda continues to provide some impetus for action in Kazakhstan. As discussed in Section 4.3, a range of CO_2 and APG reduction programs and some renewable energy projects have been initiated by companies including KMG and TengizChevrOil. As with the Russian case, our focus is not on the outcomes of these initiatives in terms of GHG emissions, however it illustrates how companies use these investments to signal compliance with international expectations, while continuing to operate within a fossil-fuel dependent system.

As Poberezhskaya and Danilova [31] argue, in non-democracies even climate mitigation ambitions or climate vulnerability can become part of 'resource nationalism' [115], turning climate discourse into a political instrument to further regime stability. For example, Russia's climate discourse between 2020 and 2022 appears largely instrumental rather than substantive, given its domestic obstruction of climate action [51]. Possible motives include projecting legitimacy akin to its mimicry of democracy and sustaining soft power ties with Europe for energy trade. In this regard, the narratives on a 'geopolitical shift' and the 'damaging role of sanctions' to climate action could be seen as a manifestation of 'soft power' used to influence European debates by framing conflict resolution with Russia as essential for global climate goals. At the same time, at the national level they feed into 'us vs them' (Cold War-like) rhetoric where even a pretence of climate action becomes obsolete [22].

In sum, in autocracies it is difficult for both private and state-owned companies to develop independent climate change discursive strategies. Thus, even profit-oriented oil companies, regardless of their ownership structures can forfeit their financial priorities and international business links if it goes against the state's political agenda. In some rare cases it can lead to positive outcomes, if an autocrat is attempting to 'green' their image or a proactive climate policy feeds into a regime's survival strategy (e.g. [116]). More frequently however, the climate discourses of oil companies are deeply interwoven with the state's fossil fuel-linked national interests and geopolitical priorities. To make matters worse, since authoritarian states do not have or have very limited alternative climate narratives present in the public sphere, the contribution of oil companies to 'the construction of a hegemonic discourse' goes unchallenged (e.g. [117]).

6. Conclusion

Our findings advance the climate politics literature by challenging the conventional dichotomy that views SOEs as extensions of the state and private companies as autonomous actors. We show that in both Russia and Kazakhstan, the overarching authoritarian political context dominates how oil companies approach climate change. Subsequently, differences between ownership structures – state-owned versus private – become secondary, as the state exerts substantial influence over corporate behaviour through informal mechanisms such as 'creeping re-nationalisation', regardless of formal ownership. Consequently, ownership alone has limited bearing on a company's climate agenda. Weak rule-of-law, limited judicial independence and protections for private property, and persistent corruption, further constrain corporate autonomy in authoritarian settings.

These findings have broader implications for understanding corporate roles in global climate governance. While, undeniably, IOCs play a central role in the global response to climate change, we would also urge scholars not to overlook state-owned oil companies, particularly those operating within restrictive political settings, as they offer a valuable lens to understand the interaction between state and corporate interests. In this regard, Russia and Kazakhstan provide important insights into the discursive strategies oil companies adopt in their climate change responses. In some ways, these strategies correspond with what we know from the existing literature on oil company involvement in climate politics, with calls for a 'balanced approach' to energy transition, and an emphasis on technological solutions common across the fossil fuel industry, and widely regarded as a form of climate obstruction or delay.

Yet these cases also offer the opportunity to reflect on climate politics in an authoritarian setting, with companies demonstrating a loyalty to the state and aligning themselves with the national climate frameworks set out by governments. This highlights that political context is a key determinant of how oil companies frame climate issues, refining theoretical expectations that ownership type alone drives corporate engagement with climate policy.

Overall, this research advances our understanding of how different types of oil companies navigate climate discourses within restrictive authoritarian settings. Building on these insights, future research could extend the analysis to other 'petrostates' and incorporate comparisons with IOCs. It is also important to explore whether these national climate

discourses impact international dialogues on climate action. Future research could also assess whether corporate investments in decarbonisation in these two cases deliver measurable reductions in emissions and energy intensity, rather than functioning primarily as symbolic commitments. Quantitative analysis linking investment data to environmental outcomes would help clarify their real impact. Lastly, it would be beneficial to expand methodological approaches and incorporate field work and interviews, while exercising caution given the challenges of studying oil majors operating within restrictive regimes.

CRediT authorship contribution statement

Ellie Martus: Writing – review & editing, Writing – original draft, Methodology, Investigation, Conceptualization. **Marianna Poberezhskaya:** Writing – review & editing, Writing – original draft, Investigation, Conceptualization. **Marat Karatayev:** Writing – original draft, Investigation, Conceptualization. **Elena Novikova:** Writing – original draft, Conceptualization.

Declaration of competing interest

We have nothing to declare.

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Data availability

Data will be made available on request.

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