

SUMMARY

Benchmarking tool

Telecoms sustainability scorecard

We benchmark the performance of over 70 companies against eight sustainability related criteria.

Sustainability Insights Service

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To be credible partners to customers on achieving net-zero, telecoms operators must demonstrate a commitment and progress in reducing their own scope 1, 2, and 3 emissions and embedding sustainability as a priority across the organisation.

Solving the scope 3 challenge will also require significant collaboration across the value chain. In this update we have included a new criteria assessing companies' participation in pan- and cross-industry organisations aimed at addressing these challenges.

Which companies are most mature in their sustainability journeys – and how did they get there?



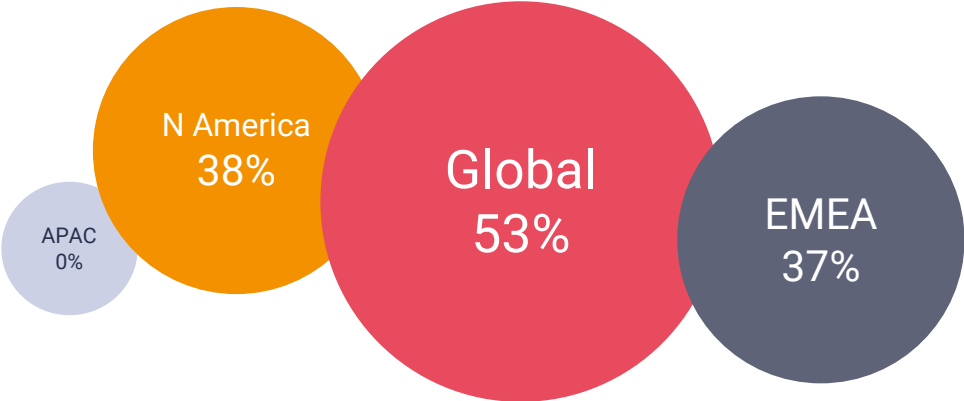
How do telcos compare with their peers on sustainability, and how can they accelerate their impact?

- This scorecard rates telecoms operators' and a selection of adjacent market companies' sustainability credentials
 - We include a handful of global technology, content, and infrastructure players to help telecoms operators to understand where their strengths and weaknesses lie compared to them
 - Through eight criteria, we evaluate 71 companies' sustainability reporting, commitments to net-zero, biodiversity, and social and governance targets, and their activities to enable customers to achieve net-zero ambitions
- The purpose of this scorecard is twofold:
 - To help telecoms operators **understand how they compare against their peers**
 - To **identify which levers they can pull to accelerate theirs and their customers' maturity in sustainability**, by taking inspiration from those that are further ahead in their journey
- It is accompanied by an excel tool with the full scorecard for all 71 companies

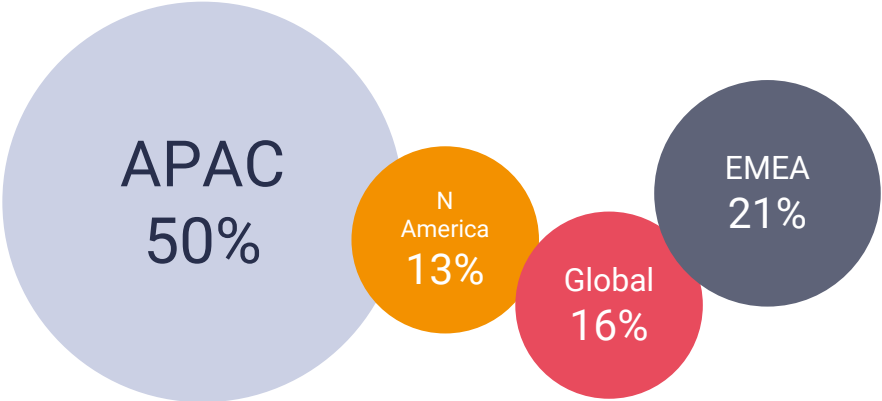
**Access the full
sustainability
scorecard in excel**

Companies with a global footprint are generally more mature with their sustainability strategies

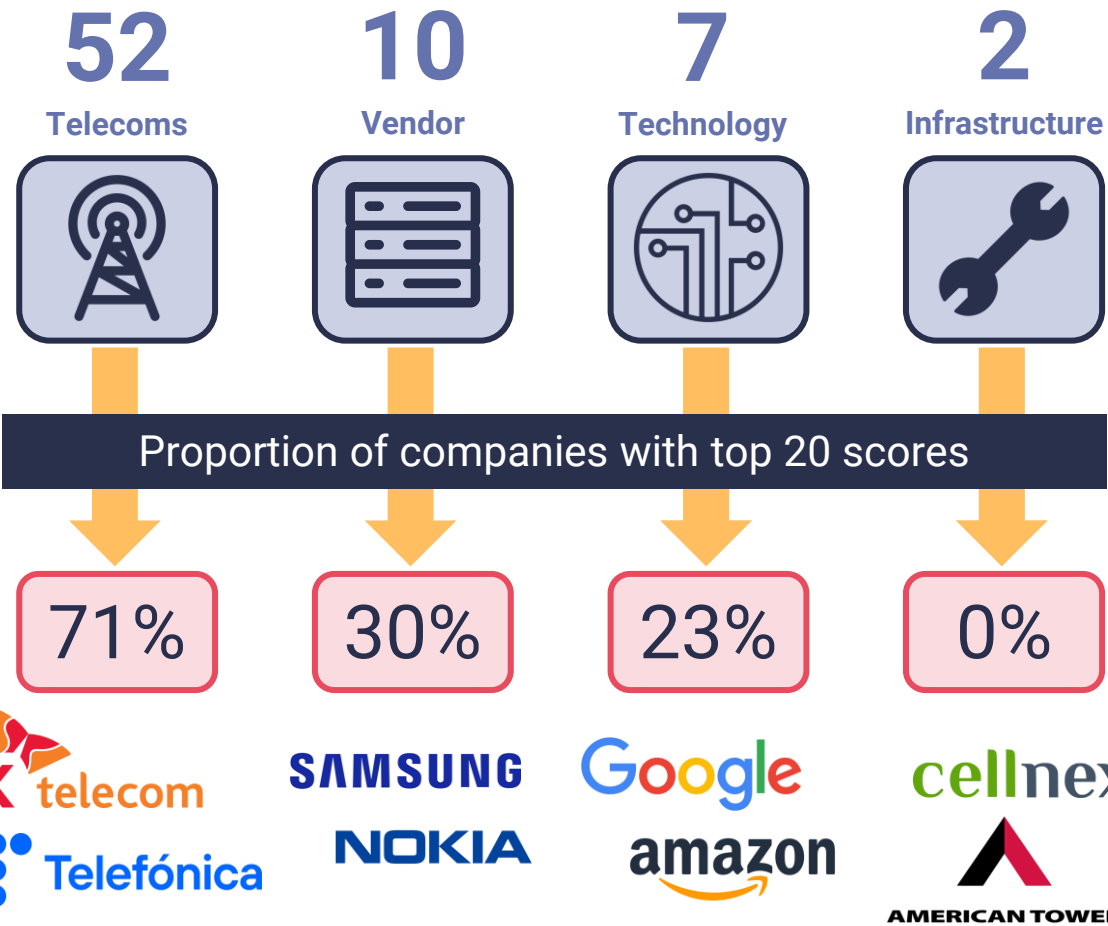
Percentage of companies by region: top 20 scores



Percentage of companies by region: bottom 20 scores



Breakdown by company type











Executive summary

Agenda

1	8 criteria evaluating commitments to sustainability	5
2	Top 5 performers	8

Our 8 criteria aim to provide a holistic view of telcos' and their competitors' maturity in sustainability

Company strategy	Company-wide management	Networks & operations	Finance	Corporate culture	Sustainability team	Consumer & enterprise BUs	Board level
1	2	3	4	5	6	7	8
Holistic sustainability reporting	Board and employee incentives	Public reporting on emissions scope 1, 2 & 3	Green finance	Commitment to diversity and inclusion	Commitment to biodiversity	Enablement of customers' reduction in CO2 emissions	Collaboration
<ul style="list-style-type: none"> Integrated across the company Length of time Ease of access 	<ul style="list-style-type: none"> Financial incentives for board and employees 	<ul style="list-style-type: none"> Ambitious targets Consistency Validated methodology on scope 3 	<ul style="list-style-type: none"> Number and type of bonds 	<ul style="list-style-type: none"> Detailed Diversity and Inclusion report 	<ul style="list-style-type: none"> Multiple initiatives Reporting on progress 	<ul style="list-style-type: none"> Verified and responsible reporting methodology Impact 	<ul style="list-style-type: none"> Signing up to organisations with joining mandates Evidence of impact
							

New in this update to the scorecard

Introduction of a new 8th criteria: Collaboration

Sustainability should not be viewed as a competitive endeavour. When companies work together on initiatives that help to drive forward progress, this benefits the entire industry. This criteria highlights the importance of companies looking beyond their internal activities and external reporting to collaborate with peers and drive cross industry, or intra-industry change. This is particularly important for addressing the scope 3 emissions challenge.

This criteria rewards companies that have played a founding role, or are active players, in initiatives that can demonstrate meaningful impact.

Inclusion of 12 new companies, including 9 vendors

We have added a further 5 telcos to the scorecard, from APAC, EMEA and North America.

In addition, this is the first time the scorecard includes vendors. These players have a vital role to play in the ecosystem, working with telcos to ensure the products and solutions they provision can contribute towards their customers' net zero ambitions. The more that vendors can demonstrate their sustainability credentials, the more attractive they are to telcos that are increasingly seeking transparency from their suppliers.

The result: Movement of the top 5

- This update has seen BT move up one place in the top 5, now in at third position above Verizon, which it has switched places with.
- Additionally, KPN has re-entered the top 5, replacing Bell which has moved down to 11th place. This has been driven by KPN's strong score in collaboration.

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Overview of top 5 scoring companies

		Holistic sustainability reporting	Board and employee incentives	Public reporting on scope 1, 2, and 3 emissions	Green finance	Commitment to diversity and inclusion	Commitment to biodiversity	Enablement	Collaboration
1	Telefónica	5	4	4	5	4	3	3	4
2	Vodafone	5	3	4	3	4	2	3	4
3	BT	4	4	3	1	5	4	3	5
4	Verizon	4	3	4	5	2	3	3	4
5	KPN	4	4	4	3	2	2	3	4

Score 5 4 3 2 1

The scorecard is also presented as an excel dashboard with full scoring details for all companies



STL Partners Sustainability Scorecard

Data updated: May 2022

This Excel spreadsheet is the dataset supporting our sustainability scorecard which is available for download for our sustainability insights service subscribers

STL Partners has leveraged publicly available data to provide a tool to benchmark the performance of a selection of companies against seven sustainability-related criteria. It is designed to highlight the areas in which the listed companies are more and less mature in their sustainability strategies. The companies listed includes telcos and small selection of others in adjacent industries (technology, infrastructure).

This tool supports telcos and their partners to:

- Benchmark sustainability performance against competitors
- Understand areas of relative strength
- Highlight areas that require greater focus in order to guide future sustainability strategies

Scoring criteria

Company list and scores

Company rankings

Key charts

The seven sustainability criteria against which companies are scored against

Full scoring details for each company

Complete ranking for each company

Data outputs based including full ranking of 45 companies, as visual outputs based on company type and region

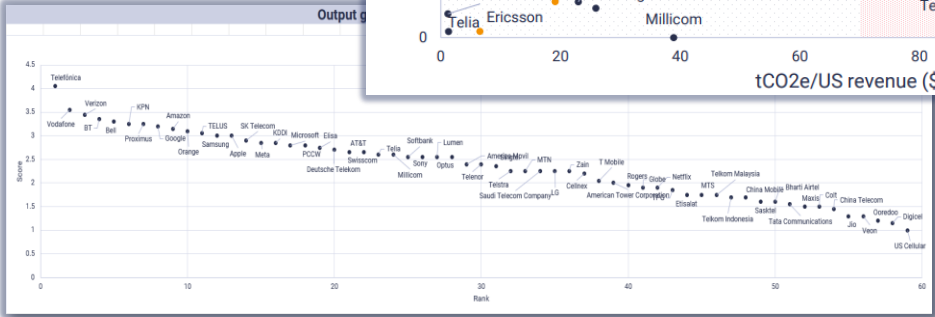
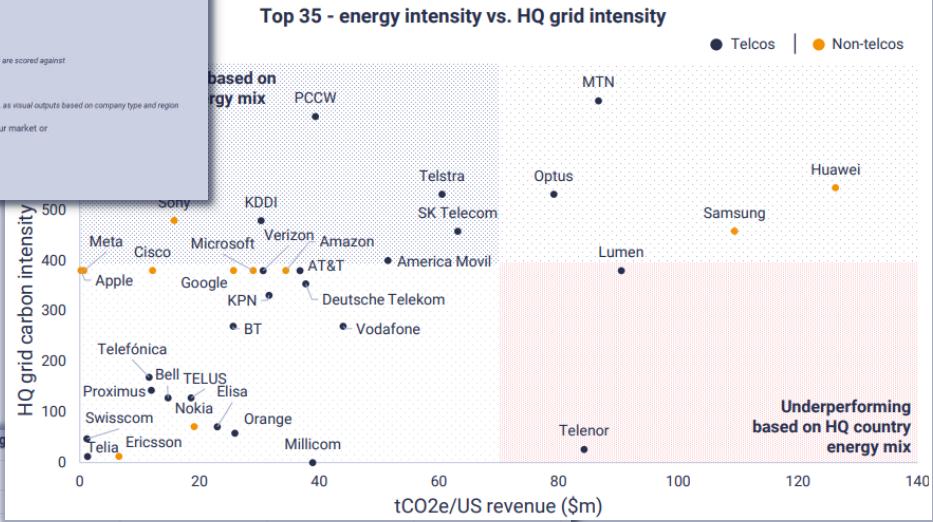
If you have any questions on the scorecard, including our methodology, assumptions, scoring rationale, or what is means for your market or organisation, please do get in touch with our authors:

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Company ranking										
Ranked companies	Region	Company type	Average score per criteria							Weighted total average
			15%15%15%15%15%5%20%							
			Structured sustainability reporting Sustainability commitments and incentives Public reporting on scope 1, 2 and 3 with associated emission reduction targets Green finance Commitment to diversity and inclusion Commitment to biodiversity Enablement							
1	Telefonica	Global	Telco	✓	✓	✓	✓	✓	✓	4.05
2	Vodafone	Global	Telco	✓	✓	✓	✓	✓	✓	3.55
3	Verizon	N.America	Telco	✓	✓	✓	✓	✓	✓	3.45
4	BT	EMEA	Telco	✓	✓	✗	✓	✓	✓	3.35
5	Bell	N.America	Telco	✓	✓	✓	✓	✓	✓	3.3
6	KPN	EMEA	Telco	✓	✓	✓	✓	✓	✓	3.25
7	Proximus	EMEA	Telco	✓	✓	✓	✓	✓	✓	3.25
8	Google	Global	Technology	✓	✓	✓	✓	✓	✓	3.2
9	Amazon	Global	Technology	✓	✓	✓	✓	✓	✓	3.15
10	Orange	EMEA	Telco	✓	✓	✓	✓	✓	✓	3.1
11	TELUS	N.America	Telco	✓	✓	✓	✓	✓	✓	3.05
12	Samsung	APAC	Telco	✓	✓	✗	✓	✓	✓	3
13	Apple	Global	Technology	✓	✓	✓	✓	✓	✓	3
14	SK Telecom	APAC	Telco	✓	✓	✓	✓	✓	✓	2.9
15	Meta	Global	Technology	✓	✓	✗	✓	✓	✓	2.85
16	KDDI	APAC	Telco	✓	✓	✓	✗	✓	✓	2.85
17	Microsoft	Global	Technology	✓	✗	✓	✗	✓	✓	2.8
18	PCCW	APAC	Telco	✓	✓	✓	✓	✓	✓	2.8
19	Elisa	EMEA	Telco	✓	✓	✓	✓	✓	✓	2.75
20	Deutsche Telekom	EMEA	Telco	✓	✓	✓	✓	✓	✓	2.7
21	T&T	N.America	Telco	✓	✓	✗	✓	✗	✓	2.65

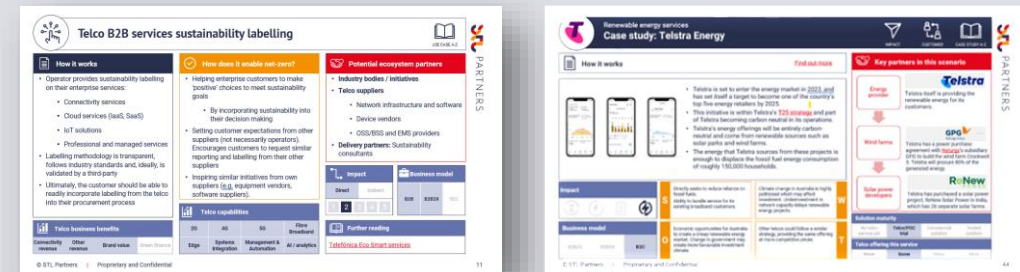
STL Partners' Sustainability Insights Service brings together tools and reports

- This research tool is part of STL Partners' Sustainability Insights Service, which aims to identify how the telecoms industry can drive growth through sustainability
- It is accompanied by an excel scorecard
- It builds on recent reports, as well as our [Telecoms net-zero enablement use case directory](#)

Previous reports



Telecoms net-zero enablement use case directory



Questions? Get in touch

Reach out directly to the authors with your questions



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