SIZING UP BIG TELECOM ON HUMAN RIGHTS
INSIGHTS FOR INVESTORS

The 2022 Telco Giants Scorecard

January 17, 2023
11am – 12pm EST
Speakers:

Dr Jan Rydzak
Investor Engagement Manager
Ranking Digital Rights

Lisa Cox
Director
Christian Brothers
Investment Services

Benjamin Chekroun
Stewardship Analyst
Candriam
Signal over Noise: RDR’s 2022 Telco Giants Scorecard

Jan Rydzak, PhD
Ranking Digital Rights
Company & Investor Engagement Manager

January 17, 2023
Investor Alliance for Human Rights webinar
Who are we?

**Ranking Digital Rights** evaluates the world’s most powerful digital platforms and telcos on their disclosed policies and practices affecting freedom of expression and privacy.
<table>
<thead>
<tr>
<th><strong>GOVERNANCE</strong></th>
<th><strong>FREEDOM OF EXPRESSION</strong></th>
<th><strong>PRIVACY</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>● Human rights policy commitment</td>
<td>● Access to terms / rules</td>
<td>● Access to privacy policies</td>
</tr>
<tr>
<td>● Governance and management oversight</td>
<td>● Transparency about how policies are enforced</td>
<td>● Collection and handling of user information</td>
</tr>
<tr>
<td>● Training and whistleblower protection</td>
<td>● Government and private demands to restrict content or access to service</td>
<td>● Government and private demands for user data</td>
</tr>
<tr>
<td>● Human rights due diligence</td>
<td>● Identity policies</td>
<td>● Security</td>
</tr>
<tr>
<td>● Stakeholder engagement</td>
<td>● Network management and shutdowns</td>
<td></td>
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<tr>
<td>● Remedy processes</td>
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<td></td>
</tr>
</tbody>
</table>

**58 indicators, ~350 questions**
The 2022 Telco Giants Scorecard

12 companies, 5 continents, 10 jurisdictions, 350 questions
A mix of progress and stagnation

9 out of 12 companies improved their scores since 2020

IMPROVED OVERALL: 9
DECLINED OVERALL: 3

IMPROVED ON GOVERNANCE: 8
DECLINED ON GOVERNANCE: 1

IMPROVED ON FREEDOM OF EXPRESSION: 7
DECLINED ON FREEDOM OF EXPRESSION: 3

IMPROVED ON PRIVACY: 10
DECLINED ON PRIVACY: 2
Still failing on freedom of expression

- Improvements and some backsliding on internet shutdowns, overall disclosures still poor
- **Blind spot:** enforcement of rules (spam, harassment, illicit material)
- **Blind spot:** transparency around government censorship demands
### How transparent are telcos about their handling of user information?

<table>
<thead>
<tr>
<th>Company</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Airtel</td>
<td>54</td>
</tr>
<tr>
<td>Orange</td>
<td>44</td>
</tr>
<tr>
<td>Ooredoo</td>
<td>30</td>
</tr>
<tr>
<td>Axiata</td>
<td>30</td>
</tr>
<tr>
<td>Vodafone</td>
<td>29</td>
</tr>
<tr>
<td>MTN</td>
<td>19</td>
</tr>
<tr>
<td>Airtel</td>
<td>17</td>
</tr>
<tr>
<td>Ooredoo</td>
<td>16</td>
</tr>
<tr>
<td>Etisalat</td>
<td>14</td>
</tr>
<tr>
<td>Deutsche Telekom</td>
<td>10</td>
</tr>
<tr>
<td>Telefónica</td>
<td>7</td>
</tr>
<tr>
<td>Telenor</td>
<td>0%</td>
</tr>
</tbody>
</table>

#### In what ways are telcos engaging in targeted advertising?

**Most involved**
- Airtel, Orange, Ooredoo, Axiata, Vodafone

**Less involved**
- Deutsche Telekom, Telefónica, AT&T, MTN Telenor, América Móvil, Etisalat

#### How are they involved?

<table>
<thead>
<tr>
<th>Type of involvement</th>
<th># of involved companies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location based advertising</td>
<td>🌍🌍🌍🌍🌍🌍🌍🌍🌍🌍🌍🌍🌍🌍🌍🌍🌍</td>
</tr>
<tr>
<td>Addressable TV</td>
<td>🌍🌍🌍🌍🌍🌍🌍🌍🌍🌍🌍🌍🌍🌍🌍🌍</td>
</tr>
<tr>
<td>Identity system</td>
<td>🌍🌍🌍🌍🌍🌍🌍🌍🌍🌍🌍🌍🌍🌍🌍🌍</td>
</tr>
<tr>
<td>Ad network</td>
<td>🌍🌍🌍🌍🌍🌍🌍🌍🌍🌍🌍🌍🌍🌍🌍🌍</td>
</tr>
<tr>
<td>Data management platform</td>
<td>🌍🌍🌍🌍🌍🌍🌍🌍🌍🌍🌍🌍🌍🌍🌍🌍</td>
</tr>
</tbody>
</table>
Some policies apply across transnational companies, but many are country-specific.

Government contracts increase the disparities.

Adaptations by partner orgs are highlighting these problems.

Wide gaps between HQ and subsidiaries.
Companies responding to ESG pressure

2022 is the first year every ranked telco published an ESG report.

The GSMA’s first ever “ESG Metrics for Mobile” identify the RDR Index/Scorecards as the key source of digital rights KPIs.

Responsible investment reports show impact of engagement initiative coordinated by IAHR.
Meeting future challenges together

The future of ESG and human rights benchmarking

What’s on your radar? Industries, technologies, strategies
Questions?
• Join our collective investor engagement with ICT companies addressing users’ rights to privacy and freedom of expression
• Sign up to our Investor Statement on Corporate Accountability for Digital Rights
• Join our bi-monthly ICT and human rights working group calls
• Refer to investor tools - ICT Salient Issue Briefings
• Vote your proxies this 2023 season
• Please contact Anita Dorett at adorett@iccr.org for further information
Thank You!

For more information, contact: adorett@iccr.org