

Corporate Social Responsibility Practice of Mobile Network Operators in the DACH Countries

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Abstract

Corporate social responsibility (CSR) and sustainability efforts are of increasing importance to consumers when making purchasing decisions. The telecommunications industry is one of the most heavily regulated industries in the DACH countries (Germany, Austria, Switzerland and Liechtenstein), with only a few participating companies generating the highest revenues. This example will be used to examine the dynamics of CSR practice in an oligopolistic market. Despite its increasing importance, there are hardly any studies on the CSR practices of mobile network operators (MNO) in the DACH countries. Therefore, their CSR strategies and activities shall be analysed for similarities, differences and trends. First, a literature review was conducted to identify research on the topic, and all MNO in the DACH countries were identified. Subsequently, the reporting of the individual companies' CSR activities since 2017 was analysed. MNO in the DACH countries take their social responsibility seriously and practise diverse and comprehensive CSR strategies. Health and mobile radiation exposure is an essential element in all CSR strategies. Furthermore, the topics of sustainability, energy efficiency, climate and environmental protection, infrastructure development, diversity, occupational safety and health, data protection and security, protection of children and minors and digital literacy and inclusion are essential elements of CSR in MNO. The mobile communication industry in the DACH countries shows exemplarily the dynamics of how CSR practice in an oligopolistic market works.

Keywords: MNO, CSR, Strategic Management, Mobile Communication

Introduction

The social responsibility and sustainability efforts of mobile network operators (MNO) are becoming increasingly important for consumers when making purchasing decisions (Lee et al., 2015). Corporate social responsibility (CSR) communication, especially sustainability reporting, is an essential tool for highlighting and disseminating initiatives and steps to support sustainable development. The Global Reporting Initiative's (GRI) sustainability reporting framework is in the process of becoming the world's most widely used standard for CSR reporting in large corporations (Blasco & King, 2017). In the DACH countries (Germany, Austria, Switzerland and Liechtenstein), the telecommunications industry is one of the most heavily regulated industries. Only a few companies operating on the market achieve the highest revenues – the MNO can, therefore, be seen as an oligopoly in the DACH countries. Although more and more MNO are reporting separately on CSR initiatives and the achievement of their social and environmental goals, the information is often not detailed enough to be of value (Bhandarkar & Alvarez-Rivero, 2007). Standardised and consistent reporting is essential if CSR activities in MNO are to be monitored and managed (Bowrey & Clements, 2019). Accordingly, the market considered in this paper presents the mobile communication industry – specifically the MNO market – in the umbrella countries on the basis of their sustainability reporting. Despite the increasing importance of CSR in the practice of MNO, hardly any research exists in this area. There is an especially small amount of literature available on the question of how mobile services can be made more sustainable, fair and transparent.

Therefore, this study aims to analyse the application and implementation of CSR strategies of MNO providers in the DACH countries and to qualitatively analyse them for similarities, differences and trends. Furthermore, this example will be used to examine findings on strategic corporate management and dynamics of CSR in an oligopolistic market. The obtained results are intended to provide meaningful insight into business practices and extend the existing literature. First, the study carried out a literature review. It then identified all MNO in the DACH countries and analysed their sustainability and their reporting of CSR activities since 2017.

Literature Review

In the DACH countries, the mobile communications market is characterised by different players and different sub-markets. These can be divided into MNO and mobile virtual network operators (MVNOs). MNO are companies that operate and manage the infrastructure (e.g. cable connections, switching stations, the core network and network management systems) to provide mobile services, and thus they act as the market's network operators. MNO, therefore, have access to all network capacities, which they license to MVNOs in addition to their core business through a cooperation strategy, thus making their mobile network services available to other companies (Luber & Donner, 2019). Accordingly, MVNOs do not have their own networks, and they act as resellers by cost-effectively marketing mobile services under their product and brand names. An MVNO is thus characterised by a strategy of cost leadership (Nollau, 2017). In the DACH market under review, the MNO players are divided as follows. The German mobile communications market is made up of three MNO providers: Telekom Deutschland GmbH, Vodafone GmbH and Telefónica Germany GmbH & Co. OHG (Bundesnetzagentur, 2020). The Austrian mobile communications market also consists of three MNO providers: T-Mobile Austria GmbH, Telekom Austria AG and Drei Austria GmbH (ICT Kommunikation, 2020). The Swiss mobile communications market subsumes the companies Swisscom AG, Sunrise Communications AG and Salt Mobile SA under the term MNO (BAKOM, 2020). The mobile communications market in Liechtenstein comprises a total of three MNO, each with its own infrastructure: Telecom Liechtenstein AG, Swisscom (Schweiz) AG and Salt (Liechtenstein) AG (Amt für Kommunikation, 2020).

There is currently little knowledge on the subject of CSR in mobile communications companies. Although more and more mobile communications companies are reporting on their CSR initiatives and the achievement of their social and ecological goals, the information is often not detailed enough to be meaningful (Bhandarkar & Alvarez-Rivero, 2007). There is little literature available, especially on how to make services in the mobile communications industry more sustainable, fair and transparent (Wang et al., 2016). With reference to this, numerous research deficits are explicitly seen in the areas of 'climate protection', 'fairness and transparency' and 'data protection' (Wetell, 2019).

In the modern global economy, behaving appropriately socially responsibly is now seen as a social necessity (Marsden & Andriof, 1998). Accordingly, customers are increasingly demanding that mobile communications companies also assume social responsibilities (Lee et al., 2015). Standardised and consistent reporting is essential if CSR activities are to be monitored and managed (Bowrey & Clements, 2019). The question for MNO is no longer whether CSR activities should be carried out, but rather how they should be carried out (Smith, 2003). In line with this, CSR has also gained importance in management research (Schneider, 2015). Accordingly, CSR must not only be understood as a business management process but must also be professionally integrated into the area of strategic corporate management (Maignan & Ferrell, 2004). Indeed, international standards and a wide range of instruments (e.g. certification, corporate mission statements and sustainability reporting) or comprehensive management systems are available for modelling CSR in mobile communications companies (European Commission, 2004). In return, sustainability and social concerns can be significantly promoted through their inclusion in CSR frameworks and standards as companies must take these concerns into account in their CSR reporting (Miethlich, 2019). However, so far, there is little knowledge about the implementation of specific CSR activities (Peloza & Shang, 2011; Wang et al., 2016). Therefore, the acquisition of profound knowledge of how CSR activities affect mobile communications customers – in terms of their overall impression of the company and its benefits –

remains of great importance for strategic corporate management (Chen et al., 2018; Pelozo & Shang, 2011).

Increased competition in oligopolistic markets – such as the mobile communications market – leads to increased adaptation and activity of CSR (Hawn & Kang, 2018) and can lead to a sustainable competitive advantage (Lambertini & Tampieri, 2015). In oligopolies, strategic market considerations seem to be the primary reason for a company's implementing of CSR (Lambertini & Tampieri, 2015; Wirl, 2014). Companies operating in an oligopolistic market play a pioneering role here, which other companies adopt. This 'rat race', therefore, explains the rapid adaptation and the great growth of CSR in oligopolistic markets (Wirl, 2014). On the positive side, the presence of companies with CSR can be seen as effective self-regulation of an oligopolistic market (Lambertini & Tampieri, 2015). For example, one of the few existing studies on CSR in the mobile communications market, which uses the South Korean mobile communications market as an example, showed that CSR is a key factor for competitive success. A positive correlation was found between CSR and customer satisfaction and the decision to choose a provider (Lee et al., 2015).

This anchoring of CSR is particularly elementary in the area of strategic management with regard to the achievement of sustainable competitive advantages in the mobile sector. Only through this can mobile communications companies achieve and maintain a competitive position in the market (Bea & Haas, 2016). However, CSR activities can only give mobile communications companies a real competitive advantage if they succeed in generating or expanding actual customer benefits (Papulova & Papulova, 2006). Sustainability reporting, therefore, plays an important role in mobile communications companies' generation of competitive advantages from their CSR activities. Only through customer awareness of their commitments can advantages for the company be created (Pelozo & Shang, 2011). The method for achieving and securing a lasting competitive advantage is referred to in the specialist literature under the term 'competitive strategies' (Kerth et al., 2015). Porter (2008) discusses competitive strategies, and Baumgartner and Ebner (2010) discuss the classification of CSR strategies, dividing them into conservative, visionary, introverted and extroverted strategies. According to Porter (2008), the basic strategic options for gaining a competitive advantage are differentiated into two types: the strategy of cost leadership and the strategy of differentiation. Porter posits that a competitive advantage can only be achieved if entrepreneurial action is taken by focusing on one of the two main strategic directions: either the most favourable cost structure (strategy of cost leadership) or differentiation (strategy of differentiation). For this reason, these strategy options are also known as generic competitive strategies (Porter, 2008). Within these generic strategies, there is a third option concerning the cultivation of the market area: the strategy of concentration on focal points. In this case, the concentration takes place in a sub-market – e.g. an industry or a target group – that has a certain structure of needs (Bea & Haas, 2016). The validity of the respective generic competitive strategies is industrywide, whereas, in the strategic approach of concentration on focal points, it is only specific to the respective segment (Porter, 2008). Accordingly, the market to be addressed is defined by focusing on a niche of the respective industry (Kerth et al., 2015).

The prerequisite for gaining a sustainable competitive advantage in the mobile communications sector is profound knowledge and a clear understanding of customers' needs. Only if customer needs are met profitably, effectively, consistently and better than by competitors can a real competitive advantage be created (Papulova & Papulova, 2006). In this respect, CSR activities are very suitable as a means of developing differentiation strategy methods in the mobile communications market (Chen et al., 2018). Within this strategic sub-area, decisions on services are considered a market-related problem. The respective components of the differentiation strategy represent intangible (and tangible) problem solutions in line with customer needs (Brockhoff, 1999). Satisfying customer needs through a service programme geared to those needs can ensure that strategic marketing and corporate goals are achieved (Meffert et al., 2015). These aspects thus make a sustainable contribution to the corporate success and viability of mobile communications companies in the DACH market.

Methods

First, all MNO in the DACH countries were identified. Then, the CSR, sustainability and annual reports from 2017 to 2019 were examined with regard to CSR activities. The identified MNO were asked by email to provide any missing information, such as the year for which the first CSR or sustainability report was published. Furthermore, the GRI database (GRI, 2020) was used for complementary information. The scientific publication databases Web of Science and Scopus were also searched for research on the topic using the following query: ('CSR' OR 'social responsibil*') AND ('MNO' OR 'mobile network operator' OR 'telecom*' OR 'MNO') AND ('German*' OR 'Austria*' OR 'Switzerland' OR 'Swiss' OR 'DACH' OR 'Liechtenstein'). Three publications were found in the Web of Science database and 10 were found in the Scopus database, of which only two articles at least partially dealt with the CSR practice of MNO or telecommunications providers in the DACH countries.

Results

The literature research carried had only revealed an investigation into the CSR of a Swiss MNO and a further article on an Austrian MNO. No additional literature on the subject exists. Sachs et al. (2006) examined the organisational and strategic implementation of CSR at Orange SA, a Swiss MNO and predecessor of Salt Mobile SA, and pointed out variants for interaction with stakeholders. Szöcs et al. (2014) investigated the Austrian mobile communication market and demonstrated a positive correlation between CSR and corporate reputation. There are no studies on the CSR practices of MNO or the telecommunications industry in general in the DACH countries. On this basis, the CSR and sustainability reporting and annual reports of the companies identified were examined concerning their CSR activities. The identified MNO in the DACH countries are listed in Table 1, and the form of CSR reporting is described.

Table 1: Overview of sustainability/CSR reporting by MNO.

Country	MNO	Sustainability/CSR reporting
Germany (D)	Telekom Deutschland GmbH	1996: first reports on sustainability activities in various publications* From 2003, combined personnel and sustainability reports* From 2004, also reports according to GRI standard* From 2008, separate CSR report* Annual reporting to date
	Telefónica Germany GmbH & Co. OHG (O2, E-Plus)	2006: first CSR report? From 2009, GRI Standard Separate CSR reports Annual reporting to date
	Vodafone GmbH	2001: first CSR report* Separate CSR report From 2009, GRI Standard Parent company maintains international CSR reports Annual reporting to date
Austria (A)	Telekom Austria AG (A1)	2005: first CSR report? CSR report integrated into the annual report From 2005, GRI Standard Annual reporting to date
	T-Mobile Austria GmbH (Magenta)	2010: first CSR report? Separate CSR report From 2011, GRI Standard

		Annual reporting to date
	Drei Austria GmbH (3)	No dedicated CSR reporting; the superordinate, international holding company maintains CSR reports Annual reporting to date
Switzerland (CH)	Swisscom AG (formerly Schweizer Telecom)	1997: first CSR report* Separate CSR report From 2009, GRI Standard* Annual reporting to date
	Sunrise Communications AG	2015: first CSR report* Separate CSR report Annual reporting to date
	Salt Mobile SA (formerly Orange SA)	No CSR reporting* Only keywords on the website, no specific reports or further information about them (Orange SA had CSR reports already from 2001, according to GRI)
Liechtenstein (FL)	Telecom Liechtenstein AG (FL1)	No dedicated CSR reporting References to individual CSR activities integrated into the annual report
	Salt (Liechtenstein) AG (7acht)	No dedicated CSR reporting
	Swisscom (Schweiz) AG	No dedicated CSR reporting

Sources: Company websites, *provided by the company by email.

Most MNO in the DACH countries carry out regular annual CSR or sustainability reporting. The first reports date back to 1996 in Germany and 1997 in Switzerland, and CSR was, therefore, a strategic issue in both countries at a very early stage, much more rapid than in other sectors. The CSR reports are mostly published separately and are based on the GRI standard. There are also a few mobile communication companies that have recently stopped publishing CSR reports, but have previously done so for more than a decade. This applies, for example, to the Swiss MNO Salt Mobile SA. It is noticeable that no MNO in Liechtenstein carries out dedicated CSR reporting.

The CSR and sustainability reporting, as well as the annual reports of the identified MNO, were examined for their CSR activities. The only criterion was that the activities had to go beyond the legal minimum. The activities found were assigned generalised terms, which are listed in Table 2 for each company.

Table 2: Overview of MNO' CSR activities in the DACH countries.

Country	MNO	CSR activities (cumulative)
D	Telekom Deutschland GmbH	Digital literacy, Digital inclusion, Health and mobile radiation exposure (EMF), Occupational safety and health, Infrastructure development (network quality and reliability, service for all), Climate and environmental protection, Cultural and sports sponsoring, Sustainability (products, services, operations and supply chain), Cyber security, Consumer protection and security, Protection of children and minors, Diversity, Equal opportunities
	Telefónica Germany GmbH & Co. OHG	Data protection and security, Digital inclusion, Health and mobile radiation exposure (EMF), Occupational safety and health, Good employer, Protection of children and minors, Sustainability (products, services, operations and supply chain), Climate and environmental protection
	Vodafone GmbH	Supply chain integrity and safety (working conditions and sustainability), Health and mobile radiation exposure (EMF), Digital literacy, Diversity, Social inclusion, Energy efficiency, Sustainability (products, services, operations and supply chain), Data protection and security
A	Telekom Austria AG	Digital literacy, Digital inclusion, Products with social added value, Sustainability (products, services, operations and supply chain), Climate and environmental protection, Energy efficiency, Infrastructure development (network quality and reliability, service for all), Data protection and security, Health and mobile radiation exposure (EMF), Diversity, Occupational safety and health, Good employer
	T-Mobile Austria GmbH	Diversity, Protection of children and minors, Data protection and security, Digital inclusion, Accessibility/being barrier-free (in shops, website, services etc.), Infrastructure development (network quality and reliability, service for all), Sustainability (products, services, operations and supply chain), Climate and environmental protection, Energy efficiency, Good employer, Health and mobile radiation exposure (EMF), Occupational safety and health, Equal opportunities
CH	Swisscom AG	Digital literacy, Data protection and security, Protection of children and minors, Sustainability (products, services, operations and supply chain), Accessibility/being barrier-free (in shops, website, services etc.), Good employer, Supply chain integrity and safety (working conditions and sustainability), Climate and environmental protection, Energy efficiency, Health and mobile radiation exposure (EMF), Energy efficiency, Occupational safety and health, Diversity, Equal opportunities
	Sunrise Communications AG	Energy efficiency, Climate and environmental protection, Sustainability (products, services, operations and supply chain), Diversity, Cyber security, Data protection and security, Infrastructure development (network quality and reliability, service for all), Good employer, Occupational safety and health, Health and mobile radiation exposure (EMF), Digital literacy, Corporate volunteering, Support of domestic social initiatives

	Salt Mobile SA	Health and mobile radiation exposure (EMF), support of recycling initiatives, support of public health projects
FL	Telecom Liechtenstein AG	Sustainable management and development, Health and mobile radiation exposure (EMF), Good employer

Source: Sustainability and annual reports from 2017.

The CSR activities of companies are generally very comprehensive and diverse. Health and mobile radiation exposure was named by all MNO as an important CSR activity, with information included in reports on radiation as well as on the limits and their radiation levels, which are all below the legal limits. Sustainability is also a central issue for almost all MNO (i.e. achieving sustainability in their products, services and supply chain). For most companies, this also includes the topic of energy efficiency, in the sense of reducing energy consumption and purchasing from sustainable sources. Climate and environmental protection is, therefore, an aspect of CSR for almost all companies. At the same time, the expansion of infrastructure to achieve the broadest, most reliable and best possible coverage is also a topic in the context of CSR. Social CSR activities refer in particular to occupational safety and health and diversity in the workforce, as well as the fact that MNO themselves want to be good employers. Furthermore, digital literacy, data protection and security, protection of children and minors, digital inclusion and accessibility/being barrier-free (in shops, websites, services etc.) are further aspects of CSR.

Conclusion

CSR has become increasingly important in management research in general and is fundamental in the mobile sector's achievement of sustainable competitive advantages. Mobile communications companies in particular succeed in achieving and maintaining a competitive position in their saturated markets through product differentiation. However, CSR activities can only give companies a real competitive advantage if they succeed in generating or expanding actual customer benefits. Despite the increasing importance, there are hardly any studies on the CSR practice of MNO in the DACH countries. Therefore, this study has analysed their CSR strategies and activities and examined them for similarities, differences and trends.

MNO in the DACH countries take their social responsibility seriously and practise diverse and comprehensive CSR strategies. MNO started sustainability and CSR reporting at an early stage: Deutsche Telekom reported publicly on its CSR activities as early as 1996, and Schweizer Telecom began one year later, in 1997. Health and mobile radiation exposure is an essential element in all CSR strategies. Moreover, the topics of sustainability, energy efficiency, climate and environmental protection, infrastructure development, diversity, occupational safety and health, data protection and security, protection of children and minors, digital literacy and digital inclusion are important elements of CSR in MNO.

The analysis also showed that some MNO, such as Salt Mobile SA, no longer maintain or publish CSR reporting. This aspect serves as an indicator that CSR in the DACH countries is not always influential on the purchase decisions of customers. This circumstance may also be because the MNO sector has been making CSR efforts and reporting on it from early on – for decades. For this reason, CSR is taken for granted by customers and is less effective as a means of product differentiation. This can also be seen as an indication of the characteristics of an oligopolistic market: at first, companies adapt each other's product differentiation strategies quickly and comprehensively, but after the strategy has been exhausted, they slowly abandon it, one by one. It also appears that in the case of MNO, the transformation of the international CSR strategy to the regional level is not working sufficiently.

In summary, it can be said that CSR activities in the DACH countries are comprehensive and diverse. In Germany, this aspect is strongly pronounced in all MNO. In both Switzerland and Austria, on the other hand, there is one MNO that hardly conducts any CSR activities (or simply does not report on

them). In Liechtenstein, CSR, or at least CSR or sustainability reporting, still seems to be of no significance for MNO.

The mobile communications industry in the DACH countries is an example of how the dynamics of CSR practice work in an oligopolistic market. The study has comprehensively shown the current situation of CSR practice of MNO in the DACH countries. A further area in need of research is the analysis of the strategic contribution of CSR to business success in the mobile communications market (as an oligopolistic market).

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