INSIGHTS FROM THE REPORT
Mobile Network Operators (MNOs)

- The mobile sector plays a central role in climate action, with meaningful progress on emissions reduction, although the **majority of impact still sits within Scope 3 value chains**.
- Industry-wide momentum is strong, with climate commitments covering **80% of global mobile connections**, spanning **79 operators across 150+ countries**, while Scope 3 emissions account for around **70% of the total footprint**, highlighting where further action is needed.
- MNO-led and partner-driven solutions are already delivering value across environmental monitoring, carbon markets and clean energy adoption, demonstrating the commercial and operational relevance of climate services.
- Operational pressures are also accelerating change. In Nigeria, energy can account for up to **60% of OPEX**, with approximately **40 million litres of diesel** consumed monthly across **~30,000 towers**, while initiatives such as DARES are enabling renewable co-location models at scale.

WHY THIS MATTERS FOR YOUR SECTOR

Climate is no longer just a sustainability agenda - it is becoming a core commercial opportunity. New revenue streams are emerging across IoT-enabled services, digital MRV platforms, early warning systems and mobile money-enabled climate payouts.

At the same time, reducing reliance on diesel and improving energy efficiency can significantly lower operating costs and strengthen network resilience, while supporting more robust, data-driven sustainability reporting and transition planning.

ACTION POINTS FOR MOBILE NETWORK OPERATORS

1. **Accelerate** deployment of renewable energy and storage across network infrastructure, particularly in off-grid and high-cost diesel-reliant sites, to reduce OPEX and improve resilience.
2. **Develop** and scale climate-focused product lines across key verticals, including agriculture (advisory, finance, insurance), cities (smart utilities and services), disaster response (early warning systems) and carbon markets (dMRV and payouts).
3. **Strengthen** partnerships with innovators by providing connectivity, platforms and distribution capabilities, enabling faster scaling of climate solutions across markets.
4. **Leverage** network data and digital platforms to support advanced sustainability reporting, Scope 3 visibility and the development of credible, data-driven climate transition pathways aligned with industry frameworks.

