

Using Forest 500 Data – Financial Institutions

You can download Forest 500 data via multiple points throughout the website. Below, you can find simple instructions on how to use that data to identify trends, conduct analyses, and compare the assessments of different financial institutions. Additionally, several examples of the analyses our data can be used for are included in this document, alongside the relevant indicators and columns.

Data download of “all data” – Financial Institutions

This table explains the information included within this data download, including the column, column heading, and a description of what the column contains. If you would like to know more about our financial institution assessment methodology you can download it here ([link](#)).

Column	Column Heading	Description
A	assessment_year	The year the assessment data was collected. Multiple years can be selected before downloading, enabling comparisons from year to year.
B	flid	An internal ID reference allocated to each company and financial institution assessed by Forest 500.
C	fi_name	Holding/Parent financial institution name.
D	fi_type	The type of financial institution, e.g. bank, pension fund etc
E	hq_country	The country in which the financial institution has its headquarters.
F	hq_region	The region of the world in which the financial institution has its headquarters.
G	total_score	The financial institution’s overall score, to 2 decimal points, out of a possible 100 points.
H	scoreband	The score band the financial institution’s score (out of 100) falls into. This range is from 0 - 5.
I	commodity_assessed	A list of the 6 commodities financial institutions are assessed for - Palm Oil, Soy, Beef, Leather, Timber, Pulp & Paper (the following are grouped together - Beef and Leather, Timber and Pulp & Paper)

J	commodity_score	The financial institution's commodity score, to 2 decimal points, out of a possible 100 points.
K	indicator_group	Indicators (or questions) financial institutions are assessed by are split into the following 4 indicator groups: Overall approach, Content of commitments, Social Considerations, Reporting and Implementation.
L	group_average_score	Refers to the indicator group above. This is the average score for either Overall Approach, Content of Commitments, Social Considerations, or Reporting and Implementation.
M	group_commodity_score	Refers to the score given for each commodity and indicator group. This is the score for either Overall Approach, Content of Commitments, Social Considerations, or Reporting and Implementation.
N	parent_indicator	Indicators are questions that financial institutions are assessed against within the Forest 500. Indicators are split into "parent" and "sub". 3 indicators in the assessment have a "parent" indicator or question, which is then broken down into sub questions that address scope, reporting and validation.
O	indicator_	Indicators are numbered in the following format: 1.1 - 1.4, 2.1 - 2.11, 3.1 - 3.4, 4.1 - 4.8. Descriptions of what each indicator question corresponds to can be found in the methodology explainer included in the zip download file.
P	indtext	A brief description of what the indicator assesses.
Q	assessment	Each indicator has various answer options that the Forest 500 scores the financial institution against. Each answer selection gives a corresponding number of points for each indicator.
R	pts	The number of points the financial institution has scored for each indicator. The total amount of points a company can score varies for each indicator, please refer to the methodology explainer for a detailed breakdown of point allocation.
S	maxpts	The maximum number of points that can be awarded for each indicator.
T	quote_summary	The text answer used to assess the financial institution for each indicator. For financial institutions that are assessed in their local language, the text "[Translation]" will be added at the beginning of the answer to indicate this.
U	links_to_docs	Forest 500 only uses publicly available information for assessments. The text answers quoted for each indicator can be found within the webpage or link provided in this column.
V	extra_details	Any additional information or extra information that might be relevant for the indicator answer is recorded here.

Examples of using Forest 500 data – Financial Institutions

(Please note: the below examples have been made using the 2020 data set)

Once downloaded, the data can be further manipulated for individual needs. Below are a couple of examples of how Forest 500 data can be used.

Example #1

Comparing the commitment strength and social scores in the “timber, pulp & paper” sector of financial institutions whose headquarters are based in Canada.

Parameters/ Headquarters in Canada

filters: Assessing scores of the Timber, Pulp & Paper sector of their investments
Filtered by indicator group (overall points for: commitment strength, social considerations)

Compare: Total points scored for each section (sum of points)

The screenshot displays an Excel PivotTable and its corresponding PivotTable Fields task pane. The PivotTable is filtered by 'hq_country' (Canada) and 'commodity_assessed' (Timber, Pulp & Paper). The data is summarized by 'fi_name' (rows) and 'indicator_group' (columns), showing the 'Sum of pts' for each institution across 'Commitment Strength' and 'Social Considerations'.

fi_name	Commitment Strength	Social Considerations
BMO Financial Group	75.4	16.5
Manulife Financial	61.2	0
Power Corp. of Canada	0	0
Royal Bank of Canada	30	0
Scotiabank	14	16
Sun Life Financial	0	0
Toronto-Dominion Bank	75.6	15.6

The PivotTable Fields task pane on the right shows the following configuration:

- Filters:** hq_country, commodity_assessed
- Columns:** indicator_group
- Rows:** fi_name
- Values:** Sum of pts

Additional options in the task pane include a search bar, checkboxes for 'assessment', 'pts', and 'metrics', and a 'Defer Layout Update' checkbox.

Example #2

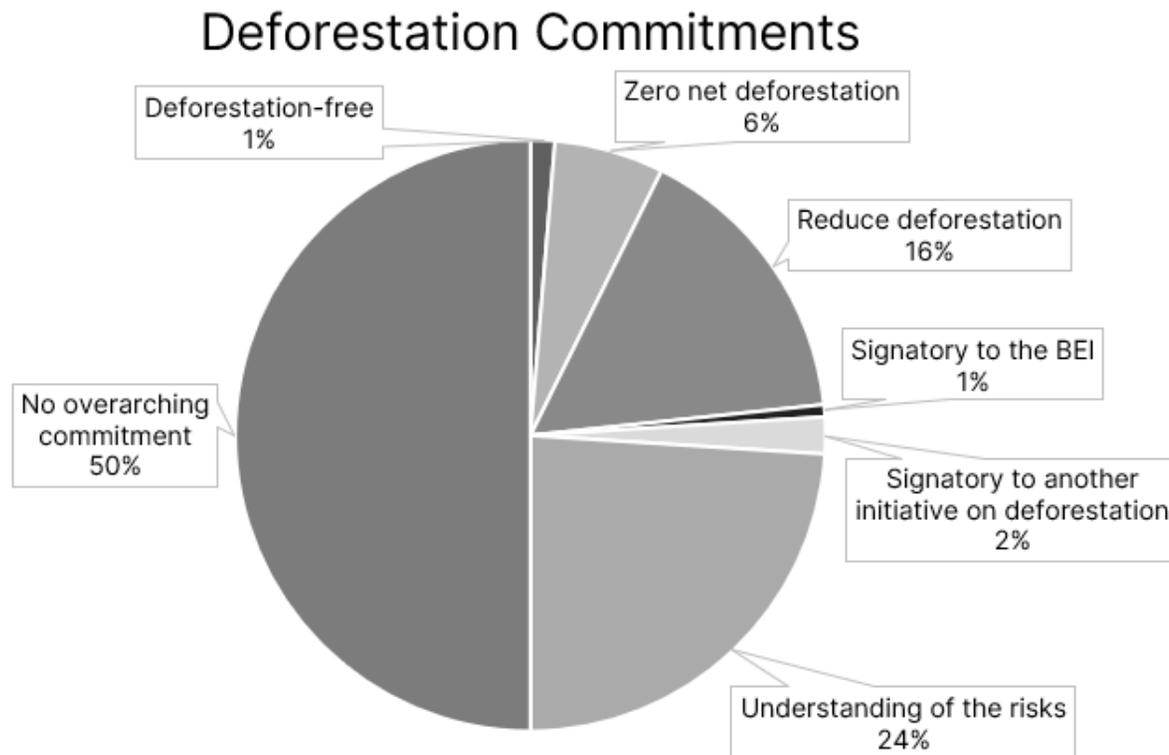
Assessing all 150 financial institutions on what kind of overarching deforestation commitment they have publicly committed to.

Parameters/ All financial institutions

filters: assessed in 2020

Filtered by indicator 1.1

Compare: Count of each deforestation commitment level, shown as the percentage of the total



Example #3

Comparing financial institutions with headquarters in the Netherlands who are involved in the soy supply chain. Specifically indicator 2.1, which assesses if a company has a deforestation commitment relating to soy.

Parameters/ Headquarters in the Netherlands

filters: Assessed for Soy

Filtered by indicator 2.1 (deforestation commitment relating to soy)

Assessment text

Compare: Points scored for this indicator (out of a possible 8 points), and the quote summary showing the text answer

fi_name	hq_country	commodity_assessed	parent_indicator	assessment	pts	maxpts	quote_summary
ABN Amro	Netherlands	Soy	2.1	All	4	4	Appendix 6 - Requirements Soy. Producers: Commitment to source from production sites that protect HCV Forest. Processors: Commitment to source from production sites that protect HCV Forest (only applicable to processors at origin or processors sourcing directly from the origin). Benchmarks: Producers, Processors and Traders are all required to have: 1. Round Table on Sustainable Soy (RTRS) membership 2. Compliance with the RTRS production standard 3. Commitment to increase the production volume of RTRS certified sustainable soy 4. Commitment to full traceability of soy supply chain.
Aegon	Netherlands	Soy	2.1	No	0	4	No commitment
ABP	Netherlands	Soy	2.1	All	4	4	Zero Deforestation: Given the large impact of land-use related industries on biodiversity, APG pays special attention to deforestation in food supply chains. Our focus is on key commodities including palm oil, soy and cattle
ING Group	Netherlands	Soy	2.1	All	4	4	The ESR Framework applies to: a) ING Bank NV and all its majority-owned legal entities and branches. Legal entities where ING Bank NV has a minority interest are actively encouraged to apply the spirit of ING's ESR Framework.
Rabobank	Netherlands	Soy	2.1	All	4	4	We specifically expect all of our clients active in the soy industry to: [...] operate according to the industry's best practices and principles for social and environmental responsible soy production, for instance, such as the principles and criteria of the RTRS or the Basel Criteria for Responsible Soy Production; have a purchasing policy that pays attention to the sustainability issues for soy production