Ofcom's plan of work 2022/23

Making communications work for everyone

Ofcom's plan of work 2022/23 – Welsh translation

Contents

1. Foreword

Communications underpin how people live, learn and work in the UK today. From TV to radio, telecoms to post, over the airwaves and online – Ofcom's mission is to make communications work for everyone around the UK, at a time of unprecedented change.

In 2022, viewers and listeners have a dizzying degree of choice and control over the media and services they enjoy. Online services continue to expand into every corner of adults' and children's lives – creating new opportunities to communicate and collaborate, but increasing the risk of harmful content and conduct that could be encountered.

Telecoms networks are becoming faster and reaching more people, but they face challenges in withstanding cyberattacks or extreme weather. And amid global political upheaval, people are even more in need of news that is accurate and relevant to their lives.

Ofcom's job is to set the rules that secure these benefits and tackle these challenges. To help us do that, we've established three major goals for the coming years for the communications sectors. We want people to have internet they can rely on; media they trust and value; and the opportunity to live a safer life online.

Having internet we rely on means several things. Clearly, people today expect access to fast, affordable broadband and mobile. From shopping online to streaming, gaming, video calling or collaborating around the country – speed, value and availability matter. But that isn't enough. We also want to ensure that the technology behind these connections is reliable, resilient and secure.

Over the next year we will start implementing the Telecoms Security Act, a pivotal step in delivering on this priority. Alongside it we are continuing to promote investment in better networks and fairness for customers.

What about media we trust and value? We know how important our broadcasting and media sectors are to this country's culture, society and economy. But there is work to do – both to protect and promote public service content for the next generation; and to ensure that everyone in the UK feels represented in the programmes they see or hear.

Ofcom has a strong track record of maintaining content standards on TV and radio. So I'm pleased that this year's Plan includes a dedicated theme shining a light on this area. It also explains our wider work to support public service media and uphold standards at the BBC.

Finally, we want people to live safer lives online. Ofcom already has a remit to oversee how video-sharing apps and sites established in the UK – such as TikTok and Twitch – are protecting their users. In the autumn we will publish our first report on how the industry is meeting its responsibilities. In 2022 we are also finalising preparations to take on new, wider duties. The Online Safety Bill gives us new powers to ensure that social media, search engines and messaging services are identifying and addressing risks of harm, and designing their services in a way that minimises it.

In future, when any child or adult in the UK goes online, we want them to know that tech firms are taking meaningful steps protect against harm, and that Ofcom is holding these companies to account.

By focusing on these three areas, and continuing to oversee the universal postal service and support industries which rely on the country's radio spectrum, we can improve and secure the services that are critical to people around the UK, its nations and regions.

I want to thank everyone who helped to shape this Plan by responding to our consultation or attending our virtual event in January. As we carry out our work, we'll keep listening to feedback and making sure our priorities reflect those of the people and businesses we serve.
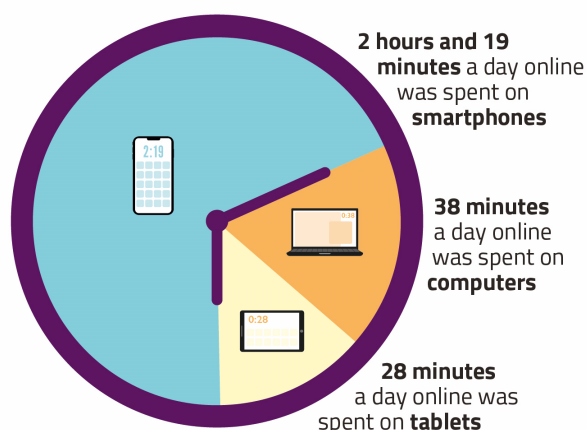
Dame Melanie Dawes, Chief Executive

2. Overview

A plan of work to deliver on our mission

2.1   The work we set out for the year ahead reflects the wide variety of ways that Ofcom will make a difference for people and businesses as we deliver our mission to make communications work for everyone.

2.2   We do this against the backdrop of dynamic sectors which continue to invest and innovate. And convergence of our sectors continues apace. We see this with telecoms providers using cloud-based services provided by tech companies such as Amazon, Microsoft or Google, and viewers watching more and more hours of television online ever year. Our role, as the sector regulator, is to protect consumers while supporting businesses who are looking to innovate and grow.

2.3   Our work must also take account of the experiences and concerns of consumers and citizens across the country. As we publish this Plan, inflation in the UK has reached a 30-year high, with people facing higher bills and prices, and many companies in the sectors we regulate facing rising costs or challenges in global supply chains.

Reliable, resilient and high-quality internet connections underpin the development of the UK economy

2.4   Throughout society, we are increasingly relying on the UK's communications networks for the way we live, work, shop and use public services – from video calls with loved ones to remote working, enjoying ultra-high-definition films and programmes, or tracking parcels being delivered to our homes. With so many services now reliant on them, the need for faster and more reliable broadband and mobile networks has never been more important.

UK adult internet users spent an average of **3 hours and 25 minutes** a day online on computers, tablets and smartphones in September 2020, of which...

2 hours and 19 minutes a day online was spent on **smartphones**

38 minutes a day online was spent on **computers**

28 minutes a day online was spent on **tablets**

2.5   Across the country we are spending more time online. During the pandemic, on average people spent a quarter of their waking days connected to the internet[1]. Sectors such as finance, health, education and logistics are also developing new online services to meet people's needs. New and evolving questions and challenges emerge for regulators and policymakers as society becomes increasingly dependent on these online services – particularly concerning how to ensure the future reliability of networks, as well as safety and trust in the content that runs across them.

2.6   The emergence of new ways of working in businesses, such as the increased use of hybrid workspaces and tools that enable greater online collaboration, highlights the importance of reliable networks to the economy. Services such as Zoom and Microsoft Teams are now business-critical for organisations in the private and public sector alike. This dependency on over-the-top services focuses attention more broadly on the reliability of internet-based services, and not just traditional telecoms infrastructure.

2.7   At the COP26 conference in November 2021, world leaders gathered to address the critical issue of climate change. Communications services can play a role in enabling the reduction of carbon emissions as we aim for a more sustainable society. Fixed and wireless services can be instrumental in the transition to net-zero carbon – whether through reducing travel, increasing network durability, or enabling services such as smart meters in homes or satellites to monitor climate change. We will continue to work with companies in our sectors to consider how they can contribute towards meeting the UK's net-zero carbon target.

A strong and sustainable broadcasting sector remains key to the wider media landscape

2.8   There has been a renewed focus on trust in what audiences see and hear. The threat of online misinformation and disinformation contrasts with the expectations of quality and accuracy that audiences place on the UK's public service broadcasters (PSBs). The PSBs – the BBC, ITV, STV, Channel 4, S4C and Channel 5 – play a central role in providing reliable information that everyone can trust. During the pandemic, PSBs achieved their highest combined audience share in more than six years, at around 59%.[2]

2.9   More widely, the value of PSBs and other UK-based media organisations was as strong as ever, even as streaming services such as Netflix, Amazon Prime Video and Disney+ offered the public an increasingly wide choice. Two-thirds of UK adults who watch both public service broadcasting and subscription streaming services said the former were better at "providing programmes which reflect UK life and values".[3] It remains crucial that people and communities in all parts of the UK are represented and reflected in the content that they see on television and hear on the radio.

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[1] See Ofcom, June 2021, Online Nation: 2021 report.
[2] See Ofcom, August 2021, Media Nations: UK 2021 report.
[3] See Ofcom, December 2020, Public service broadcasting: quantitative research findings.

Establishing a solid foundation for regulation of online safety

2.10   As Ofcom takes on new duties, online services are coming under increasing scrutiny, with questions of safety and trust increasingly part of the public discourse. Six in ten connected adults – and eight in ten older children – report having had at least one harmful experience online in the past year. Two-thirds of people believe social media should be more regulated.[4]

2.11   The Government has now published its Online Safety Bill, and we will be continuing our work to prepare for the new regime as the Bill goes through Parliament so that we can play our part in helping people in the UK to live a safer life online. We will also continue to engage with tech companies as part of our active regulatory work on video sharing platforms.

We will continue to develop Ofcom's skills and capabilities as our remit grows

2.12   With the growth of our remit, Ofcom needs to grow and evolve our own skills and capabilities, particularly as we take on new duties for cyber and online safety.

2.13   Our plans span several years, but we have already made significant progress, building on Ofcom's traditional expertise in telecoms, broadcasting and spectrum. For example, we have built new teams with expertise in data engineering and analytics, so we can use artificial intelligence and machine learning to extract new insights and tackle complex data sets. We will use these techniques in our current work as well as in our new duties. We have recruited significant new expertise in cyber and online safety, including online technologies.

2.14   Ofcom opened its new tech hub in Manchester in autumn 2021. This will act as a base for our online safety and telecoms security functions and allow us to develop partnerships locally with industry and universities. Our Manchester hub is part of our growing presence across the UK which includes offices in Edinburgh, Cardiff and Belfast. We aim to reflect the make-up of the UK as we grow the organisation.

2.15   This reach allows us to serve and attract talent from the whole of the UK. As well as geographic representation, our diversity and inclusion strategy, published in January 2021, sets ambitious targets to improve our minority ethnic, disabled and female representation by 2026. This is necessary for us to do our job well. Above all we want to welcome greater diversity of thought and experience and create a culture of inclusion, no matter what background our colleagues come from.

2.16   We will also draw on, and grow, our links to industry, academia, charities and other experts, working closely with other regulators as part of the Digital Regulation Cooperation Forum. We will step up our co-operation with international counterparts to share

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[4] See Ofcom, June 2020, Internet users' experience of potential online harms: summary of survey research.

knowledge and encourage regulatory consistency, particularly on topics such as online safety that cross national borders.

2.17   This plan of work builds on these ambitions and sets out our intentions for 2022/23, to make communications work for people and businesses across the UK.

2.18   Our themes for the next financial year are:

> - **Investment in strong, secure networks.** We will support continued investment in high-quality and reliable broadband and mobile networks.
> - **Getting everyone connected.** We want to make sure people and businesses can access communications services, and that nobody is left behind as services evolve. We will work to make sure that the universal postal service is sustainable for the future.
> - **Fairness for customers.** We will support customers and ensure they are treated fairly, continuing our fairness for customers programme and tackling scams. Having set clear standards, we will shift our focus to monitoring and understanding the effect of the implementation and delivery of those interventions.
> - **Enabling wireless services in the broader economy.** We manage the UK's spectrum for the benefit of everyone in the UK. Our goal is to drive efficiency and support innovation, ensuring this invisible, essential and finite resource is used efficiently.
> - **Supporting and developing UK media.** We will support the UK's vibrant media sector, including public service media, helping it to evolve to meet the changing needs of viewers and listeners.
> - **Serving and protecting audiences.** We will protect people from potentially harmful and offensive content, while taking full account of freedom of expression. We will continue to issue, manage and maintain licences for all national and local commercial TV, and radio services.
> - **Establishing regulation of online safety.** We will establish our regulation of UK-established video-sharing platforms as we continue our preparations for the broader online safety regime. We will deepen our organisational preparations for our new regulatory responsibilities as the Online Safety Bill proceeds through parliament.

3. Our goals and priorities for 2022/23

3.1   As the UK's regulator for the communications sector, Ofcom's vision is to make communications work for everyone. Our duties are set out in a number of acts of Parliament. Our principal duty is to further the interests of citizens in relation to communications matters and of consumers in relevant markets, where appropriate by promoting competition. Further information about our statutory duties is set out in Annex 1.

3.2   The UK Government has set out its policy priorities in relation to telecommunications, the management of radio spectrum and postal services in its [Statement of Strategic Priorities (SSP)](). Ofcom must have regard to the SSP when exercising its regulatory functions. We have done so in developing this plan of work, as follows:

- **World-class digital infrastructure**. Under the theme 'Investment in strong, secure networks' we are promoting competition and investment in new networks and the use of radio spectrum for the benefit of people and businesses. We share the Government's commitment to world-class digital infrastructure for the UK, and our work has regard for the conclusions of the UK Government's [Future Telecoms Infrastructure Review](). In addition, our work under the theme 'Enabling wireless services in the broader economy' demonstrates how we are continuing to manage radio spectrum in an efficient and effective way.

- **Furthering the interests of telecoms consumers**. The UK Government's commitment is to safeguard telecoms customers' interests, including those who are vulnerable. Our work under the theme 'Fairness for customers' directly supports this commitment and we will be working to make sure consumers are treated fairly, are empowered to make choices that are right for them and are protected.

- **Secure and resilient telecoms infrastructure**. Our work under the theme 'Investment in strong, secure networks' supports the UK Government's commitment to network resilience and security.

- **Postal services**. Our work in 'Getting everyone connected' includes reviewing whether regulation of the sector needs to change in light of market changes and evolving user needs.

3.3   Below, we set out our priority work areas for the year. This includes details and important milestones of our priority projects and programmes. Our wider plan of work, including these highlighted areas of work, can be found in Annex 2.
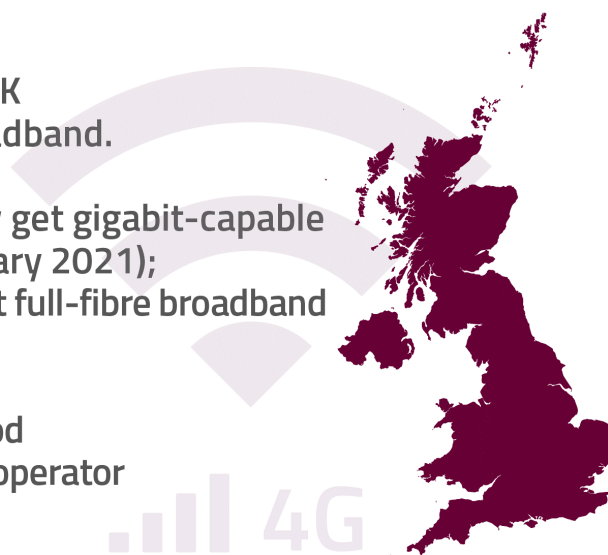
Investment in strong, secure networks

We will support the continued investment and innovation in high-quality and reliable communications networks to deliver the services people and businesses need. We will continue our work to implement telecoms security legislation to enhance the security and resilience of these networks.

3.4   The need for higher quality, faster networks is greater than ever. Continued investment has increased the proportion of UK homes that can access gigabit-capable services from 37% in January 2021 to 40% in May 2021.[5] But there is more work to do to provide high-quality services, and affordable broadband for people throughout the UK.

As of May 2021, **96%** of UK homes can get superfast broadband.

Nearly **40%** of homes can now get gigabit-capable services (up from 37% in January 2021); and **24%** of UK homes could get full-fibre broadband (just under 7 million homes).

92% of the UK also has good 4G coverage from at least one operator

3.5   The resilience and reliability of networks is critical. We rely on our connections at work, at home and on the move. Strong, secure networks that are resilient to outages and cyber-attacks are essential to this. Reliable network connections are also crucial for delivering the quality of service we expect from communications services.

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[5] See Ofcom, September 2021, Connected Nations update: Summer 2021.

3.6   During the coming year our key priorities will include:

- **Mobile markets.** The markets that deliver mobile services are evolving rapidly. In response we are developing our future approach to mobile markets, aligning regulation to support the delivery of high-quality mobile connections and support innovation. Following the publication of our discussion document in February 2022, we will be building on stakeholder responses to set out our initial conclusions and any next steps.
- **Spectrum demands for mobile services.** With growing reliance on mobile connectivity, we are assessing demand for mobile spectrum for the period to 2035 and will consult on our approach to enabling millimetre-wave spectrum bands to be used for new services, including 5G mobile.
- **Supporting investment in gigabit networks.** We will continue to implement the regulations set out in our Wholesale Fixed Telecoms Market Review to promote gigabit rollout and will continue to encourage the take-up of higher speed services.
- **Telecoms security framework implementation.** We are preparing for our wider powers under the UK Government's new telecoms security legislation to monitor and assess the security of operators' networks and services, alongside enforcing compliance.
- **Net neutrality.** Ofcom is responsible for monitoring and ensuring compliance with the net neutrality rules and we can issue guidance on complying with these. Given the growing and evolving use of online services we have begun a review of how the UK's net neutrality framework is functioning. We will consider how the net neutrality framework can best serve users' interests and promote access and choice, while allowing businesses to innovate and invest.

3.7   Alongside the priorities outlined above, our ongoing work programme will include expanding our work on quality of service to consider the broader set of factors that determine people's quality of experience, and how information on performance can be used to support customer choice, promote investment in networks and improve quality.

3.8   We also recognise that digital markets pose new challenges for Ofcom. In addition to our work though the DRCF (see section 4.3), we are considering priorities for our engagement in individual markets, both in terms of Ofcom-led work and how we might support the work of other regulators, such as the CMA. We can directly respond to challenges in these markets in a variety of ways, under current and proposed sectoral powers and through the wider competition powers that Ofcom holds concurrently with the CMA and other regulators. An initial area of focus will be cloud computing which is becoming increasingly important to the delivery of a range of communications services to consumers and businesses. We will undertake work to develop our understanding of the market for cloud computing services and their role in the telecoms and broadcasting sectors.

Getting everyone connected

We want to make sure that everyone is able to benefit from the potential of digital technologies by improving access to reliable communications across the country.

3.9   As older technologies and services continue to be replaced by internet-enabled services, we need to make sure everyone in the UK can reliably connect to the internet. Today, things as common as making phone calls, messaging friends and family, watching television or listening to the radio, are increasingly done over the internet. Looking ahead, the potential offered by newer technologies – like smart homes or smart cities – provides even more possibilities to enrich experiences for individuals and communities. We recognise our role in making sure that the networks that enable these services and technologies are extended across the UK.

11% of lower socio-economic households are less likely to have home internet access, and **18% of over-64s** do not have access

3.10   Through the broadband Universal Service Obligation (USO), which gives the legal right to request a decent connection, we will help some of the 134,000 homes currently without access to decent broadband.[6] Meanwhile the Shared Rural Network being built by the four mobile network operators (EE, O2, Three and Vodafone), is helping to deliver mobile coverage to the hardest-to-reach parts of the country. We will continue to review the progress of these initiatives and support industry in rolling out the necessary infrastructure across the UK.

3.11   The pandemic has highlighted the importance of the postal sector in providing key services to people. This included the delivery of important government, NHS, administrative, and

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[6] See Ofcom, September 2021, Connected Nations update: Summer 2021. Provided the cost of a connection is less than £3,400, it will be provided without additional contributions from the customer.

bank communications to households during the crisis. The pandemic has led to a marked growth in online sales and, in turn, an increase in the volume of parcels, while at the same time the volume of letters has decreased markedly. In addition to our review of postal regulation, we will continue to monitor Royal Mail's performance on quality of service, efficiency, and the financial performance of the universal service network – as well as monitoring competition, developments in the broader parcels market, and the experiences of consumers and businesses in the postal sector.

3.12   In 2022/23, to meet our objectives, we will work across a number of areas:

> - **Migration to voice over IP.** Landline phone calls have traditionally been delivered over the traditional fixed telephone network, which is becoming obsolete. In future, landline calls will be delivered over a Voice over Internet Protocol (VoIP) technology, which requires a broadband connection. While this will ensure that people can continue to use landline services and should be straightforward for most people, some people will require extra support during this migration. We have an ongoing programme of work to monitor industry's progress in moving customers from the existing to the new technology and to help make sure people can realise the benefits quickly and are protected from harm or undue disruption.
> - **Progress our review of the future of postal regulation.** In December 2021, following a call for input we published in March 2021, we published a consultation on our review of the regulatory framework for post. The purpose of this review is to ensure our regulation remains relevant and effective for the next five years, particularly in light of changes to the market such as consumers' increasing reliance on parcel delivery and the continued decline in letter volumes. The consultation includes a review of regulation around USO services, the bulk mail market, efficiency and financial sustainability of the USO, and of the broader parcels market. We plan to issue our statement in Q2 2022/23. In addition, we will consult and conclude on new regulatory reporting requirements resulting from our postal review by Q4 2022/23. We will commence work this autumn on our review of the second-class safeguard cap in advance of a consultation and statement during 2023/24.[7]
> - **Space strategy.** As part of a wider work programme detailed in *Enabling wireless services in the broader economy,* we will continue to review how satellite orbits can be used to improve the reach and reliability of a variety of networks and consider how regulation best supports this technology.

3.13   We will also continue our work on services that remain important for many consumers.

- **The future of 2G/3G networks.** We will continue to work with industry and the UK Government to ensure appropriate coordination to protect consumers and minimise disruption during the process of 2G/3G switch-off.

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[7] We are not planning to further review user needs or the scope of the USO in 2022/23 unless directed to do so by the Government, or we otherwise consider that there are compelling reasons to do so

- **Allocating and managing telephone numbers.** We will continue to ensure the efficient use of telephone numbers which we allocate to telephony providers.
- **Legacy universal services.** We will continue our review of legacy universal service obligations, including public call boxes, itemised billing and printed directories, with a view to publishing a statement in the spring.
- **Monitoring of postal services.** We will continue to monitor the postal sector as part of our statutory duty of securing a universal postal service, having regard to financial sustainability and efficiency. We will publish an update in late 2022. This is particularly important as the effects of the pandemic decline and quality of service levels recover.

3.14 We will continue to work with governments and other bodies across the UK and internationally, advising on technical issues relating to fixed and mobile networks.

Fairness for customers

We want to make sure all UK communications customers are protected from harm, treated fairly and are able to get the best deal for their needs.

3.15   Empowering and protecting customers and ensuring they are treated fairly is an important priority for us. We will do this by continuing our fairness for customers programme and our work to help tackle scams that use telecoms services to target people. In the past few years, we have put in place significant interventions to empower and protect customers and ensure companies treat them fairly. Having set clear standards, we will shift our focus to monitoring and understanding the impact of these interventions as they are implemented and delivered.

82% of households have not experienced any affordability issues, but on average **18%** of households struggle to pay for at least one communications service
(including 5% for fixed broadband and 6% for mobile)

3.16   We will work to make sure customers are protected as the communications sector evolves, with a particular focus on protection for those reliant on more traditional services. Given the increasing reliance on communications services for many aspects of our daily lives, we will also continue to monitor the affordability of internet access for low income households and the fair treatment of customers who might be vulnerable.

3.17   We will also consider how online services may affect customers of communication services, and what that means for protecting people.

3.18   Over the next year our priorities in this area will include:

- **Implementation of switching reform.** In September 2021, we announced that we are requiring the industry to develop and operate a new 'One Touch Switch' process for all residential landline and broadband switches from April 2023. With One Touch Switch, all customers will be able to use a single process to move providers, regardless of who their provider is or the technology or network their provider uses. Following the publication of our policy statement and General Conditions in February 2022 confirming these new requirements, we will continue to work with the industry as it implements these changes.
- **Tackling nuisance calls and scams.** We have a longstanding programme of work on countering nuisance calls, but concern has been growing about scams and their effect on people. We are increasing our work with industry on technical measures to disrupt scam calls and texts, alongside coordination with other regulators, the UK Government, and law enforcement agencies. We will publish statements on our recent proposals aimed at preventing scam calls reaching consumers in Q3 2022/23. We know it won't be possible to stop all scams reaching consumers, so we will raise awareness and improve information to help people more easily spot and deal with scam calls and texts.
- **Monitoring outcomes and promoting effective compliance.** We will continue to work with providers as they implement new consumer protections that will apply from June 2022, including contract information and summaries, contract changes and rights to exit, and emergency video relay. We will evolve our focus to monitoring and understanding the impact of these and other consumer protections and promoting effective compliance. As part of that, we will make better use of our consumer insights and data including research and intelligence from our consumer contact team as well as a wide range of organisations such as the alternative dispute resolution bodies and consumer groups.

3.19   We also have ongoing programmes that support our work in this area:

- **Fairness for customers commitments.** We will continue to put pressure on providers to make sure they treat their customers fairly and deliver services and products in line with the fairness commitments.
- **Monitoring customer engagement and the impact of end-of-contract notifications (ECNs) and annual best tariff notifications (ABTNs).** We will continue to monitor customer engagement indicators. We intend to carry out a further review of the impact of ECNs and ABTNs in future to understand how effective these measures are in achieving our objectives.
- **Affordability of communications services.** We will continue to monitor and report on affordability issues and the availability, promotion and take-up of targeted tariffs designed for customers on low incomes.
- **Supporting vulnerable customers.** We will monitor whether providers are treating customers in vulnerable circumstances fairly and giving them the support and services they need.

- **Comparing service quality.** We will report on the comparative level of customer service for providers in the telecoms sector and report quarterly on the complaints we receive about different providers.
- **Pricing report.** We will report on pricing trends in fixed, mobile and pay-TV services, including reviewing the prices available to consumers buying different types of services, as well as the difference between in-contract and out-of-contract prices.

Enabling wireless services in the broader economy

We manage the UK's spectrum for the benefit of everyone in the UK. Our goal is to drive efficiency and support innovation, ensuring this invisible, essential and finite resource is used effectively.

3.20   Spectrum features daily in all our lives and is a vital element in keeping us all connected and safe. It enables a broad range of services including mobile communications and wireless broadband, wireless microphones and cameras that support news reporting and entertainment events, as well as systems such as radar used by air traffic control. Spectrum is used for systems that monitor and control road traffic and the utilities we use every day. It enables satellite services that provide TV and navigation systems alongside monitoring the earth and space to deliver accurate weather forecasts and provide data on climate change. Spectrum is also critical to support the emergency services and our armed forces.

3.21   The scale and range of users of wireless solutions is growing as technology evolves, with rapidly increasing demand for spectrum from both existing and new users. In light of this, our spectrum management vision, set out in our spectrum management strategy for the next decade, outlines how we will enable further innovation by promoting more flexible and efficient use and increased sharing of spectrum while meeting the requirements of local and national services.

By the end of March 2021, there were

380,000

live licences across the UK, and around **2000** reported instances of harmful interference in spectrum.
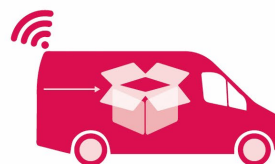
3.22   Over the next year our priorities will be informed by these areas of focus. This work will include:

> • **Enabling wireless innovation.** Many industries and industrial locations, including ports, factories and agriculture, are digitising their processes and systems – often using wireless technology to do this. We will support this transformation by ensuring access to spectrum and we will continue to engage with relevant parties to inform our policies on how best to make spectrum available. This, alongside the work to enable growth for existing spectrum users, will inform our spectrum roadmap of short-term priorities and longer-term activities.
>
> • **Reviewing how we manage spectrum at very high frequencies.** Technological developments are opening opportunities to use spectrum at higher frequencies than are generally used today. Potential applications include health screening such as skin cancer detection, non-invasive quality assurance in the pharmaceutical and manufacturing industries, security systems and high-speed data links. We will build on the flexible framework we have already developed to ensure existing users can grow and allow new users to emerge without inhibiting further innovation.
>
> • **Enabling the space sector to grow.** The space sector is undergoing considerable change with the launch of an increasing number of non-geostationary satellites to offer a wide variety of communication services and new technologies. We are undertaking a strategic review to make sure we can balance the needs of all space spectrum users alongside the national and international rules that enable its use.
>
> • **Responding to changes in spectrum demand in the utilities sector.** We are assessing the implications of the changes in communications needed to support the utility sectors' (electricity, gas and water) future plans. These plans need to deliver on the UK Government's climate change and environmental policy objectives.
>
> • **Improving our understanding of spectrum use.** We will analyse spectrum use through detailed technical analysis, real-world measurements and monitoring, such as drive testing to check mobile services coverage. Understanding how radio waves behave (propagation) is essential to our work. We will therefore undertake research and enhance our models to reflect changes in climate (both on the earth and in space) and the effects of materials used in buildings, vehicles and different types of terrain.

3.23   This work is complemented by our important ongoing programme of work to enable optimal use of spectrum across the UK, which includes:

• Efficiently managing and evolving how spectrum is authorised, accessed and used by different licensees, including delivering more of these services online. We currently manage in the region of 380,000 live licences, process around 57,000 new licences or variations to licences annually and engage with licensees to support their evolving requirements.

• Planning spectrum use to enable services to effectively share the same spectrum in different areas of the UK, such as terrestrial broadcast TV and radio, and programme-

making and special events. We will plan and license two rounds of small-scale DAB radio to enable around 50 new radio stations.

- Protecting spectrum users by monitoring for compliance against our conditions and carrying out market surveillance activities to limit the availability of non-compliant equipment. Both help alleviate harmful interference.

- Providing advice and assistance to spectrum users complaining of harmful interference to enable swift resolution of issues raised, where possible, which can include enforcement action.

- As part of our work supporting major public events in the UK, we will be supporting the 2022 Commonwealth Games in Birmingham, working closely with the UK Government, the organising committee and spectrum users to help deliver a successful event.

- Engaging internationally with other national administrators and industry to ensure that UK interests are appropriately reflected and protected in international spectrum decisions and debates.

Supporting and developing UK media

We will work to make sure the UK's media sector continues to flourish. We will support the sector to serve all UK audiences with high-quality and diverse content.

3.24   UK audiences today benefit from an unparalleled level of choice in the TV, audio and online services they can access. The wide variety of quality programmes provided across public service, commercial and streaming services are enjoyed by millions. Programming including highly-valued and trusted news bulletins, world-class drama and eye-opening documentaries all play a part in the UK's thriving creative economy.

According to Ofcom's Technology Tracker 2021, **74%** of households used a Broadcast Video-on-Demand (BVoD) service such as BBC iPlayer or All 4, and **75%** of households surveyed said they used a Subscription Video-on-Demand (SVoD) service.
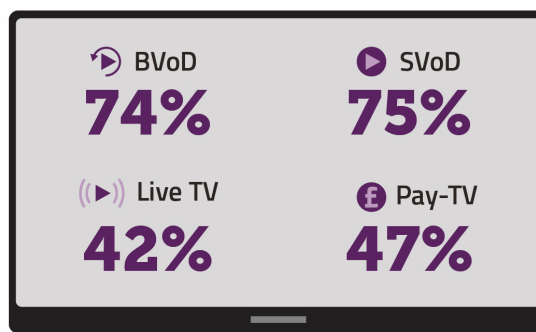
In comparison, **42%** of UK households said they used free traditional TV, and **47%** said they used a pay-TV service.

BVoD	SVoD
74%	**75%**
Live TV	Pay-TV
42%	**47%**

3.25   Audiences' expectations and habits continue to change, people of all ages across the UK are watching and listening to more content online, whether that is via a smart TV or a smart speaker, like Alexa. Subscription video-on-demand services like Netflix or Disney+ are now used in the majority of UK homes. How these services compete for audiences' attention continues to evolve. Nearly all internet users access a service like YouTube, Facebook and TikTok in any given month. Two-thirds of people, including over 90% of young adults, have played online games in the past year. Set against this changing landscape, the services offered to UK audiences, including by public service media (PSM) providers like the BBC and ITV, need to adapt. Through our work we will support the sector as it increasingly moves online, while ensuring the interests of all audiences are served. We will work with industry and the UK Government to secure a modernised regulatory framework fit for the next decade.

3.26   The creative economy is one of the UK's great success stories, delivering superb content at home, generating significant revenues and showcasing our country to the world. A vibrant creative economy is built on its diversity; a mix of large and small companies, based across

the UK's nations and regions, employing a diverse range of talent and authentically able to reach audiences throughout the country and beyond. We will continue to focus on improving the diversity of the creative sector.

3.27   Over the next year, in order to make sure everyone in the UK benefits from the strength of our broadcasting sector, the focus of our work will include:

> - **Supporting the evolution of the regulatory framework.** A strong PSM system, including broadcast and online services, is vital for audiences and for the UK creative economy more widely. Following our Small Screen: Big Debate report published in July 2021, we will continue to work with the UK Government and industry to ensure regulation keeps pace with changing audience habits and a highly dynamic market.
> - **Diversity in broadcasting.** Diversity in television and radio is an important priority for Ofcom. In September 2021 we published our five-year review of diversity in UK broadcasting, highlighting what we have learned over that period and setting out our vision and recommendations for the next five years – including Ofcom's role. We want to ensure that we have the clearest possible view across the sector so next year we will consider the data we collect and how it is collected.
> - **Relicensing the commercially-funded PSM providers.** In addition to our annual review of Channel 4's plans and delivery of its media content duties, we will progress the relicensing of the Channel 3 and Channel 5 services, including a report to the Secretary of State by June 2022 on the sustainability of current obligations.

3.28   The BBC is the UK's biggest PSM provider, with a broad mission and public purpose to serve all audiences. In our role regulating the BBC, we will continue to monitor whether it is fulfilling its duties. This includes ensuring the BBC delivers on the requirements of its operating licence and operating framework. In addition, as required we will carry out competition assessments of plans the BBC brings forward which propose a material change in services. Specific projects for this coming year include:

- **Continuing with our review of BBC regulation, ahead of the UK Government's mid-term review of the BBC Charter.** We are required to carry out at least two periodic reviews during the charter period, the first of which must be published in sufficient time to inform the UK Government's mid-term review. We must assess the extent to which the BBC is fulfilling its mission and promoting each of its public purposes. We will identify themes and issues for the future regulation of the BBC. We will publish our report in Q1 2022/23.

- **Considering how the BBC's operating licence should evolve to reflect changing audience habits and expectations in a digital world.** The BBC's current operating licence includes a range of requirements across its public services, the majority of which relate to linear, broadcast services such as BBC One or Radio 1. As audiences increasingly watch and listen to content online, via BBC iPlayer or other streaming services, we will consider how the operating licence should evolve to reflect this as part of our review of BBC regulation.

Serving and protecting audiences

We will continue to protect audiences by enforcing content standards, as well as making sure they can benefit from a wide range of commercial TV and radio services through our licensing work.

We assessed
142,660 complaints
about TV and radio programmes, a
300% increase compared to last year
(2019/20: 34,545), recorded **28 breaches**
of the Broadcasting Code, and imposed
15 sanctions on broadcasters, including
10 financial penalties.

3.29   We all rely on commercial TV and radio services to keep up-to-date with what's happening in the world, to increase our learning and for enjoyment. That's why Ofcom's role in protecting audiences of these services is crucial. We know from our research that audiences have high expectations of the content they see or hear on TV, radio and on-demand services. Our content standards duties cover a number of areas including: protection of under-18s; protection of audiences from harmful and offensive material; due impartiality and due accuracy; and unfair treatment and unwarranted infringements of privacy. Importantly, we apply those standards in a way that balances the protection of audiences with the freedom of expression of content producers.

3.30   Every year, we assess thousands of programmes on TV and radio, to see if they have broken our rules. In the last year alone, we assessed over 142,000 complaints relating to more than 11,000 individual pieces of broadcast content, a huge increase over the previous year.[8] When a broadcaster falls short of the standards set in our Broadcasting Code, we investigate following our procedures and publish detailed decisions on any programme we find in breach of our rules. If we consider a breach is serious, deliberate, repeated or reckless, we may consider imposing a sanction, such as a financial penalty, a direction not to repeat the programme, or – in the most serious cases – revoking a licence to broadcast. Last year we imposed 15 sanctions on broadcasters for breaches of our code.

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[8] Ofcom, July 2021, Annual Report and Accounts for the period 1 April 2020 to 31 March 2021.

3.31   Over the next year our work in this area will include:

- **Content standards regulation.** Ofcom is the post-transmission regulator for content standards on broadcast TV and radio. Our codes contain the rules to which all broadcasters we regulate are required to adhere. In the coming year we will continue to take robust enforcement action against broadcasters that breach these rules, particularly in the case of any serious breaches involving potential harm to audiences. Examples where such harm might arise include the broadcast of content likely to incite crime and hate speech, as well as serious breaches of our due impartiality and/or due accuracy rules.

- **Regulating content of video-on-demand services.** We are also the content regulator for UK-established video-on-demand services and will be working over the next twelve months to ensure providers are complying with new requirements around harmful content. We will also work closely with the UK Government in supporting any proposals to more closely align the standards that apply to video-on-demand services to those that apply to broadcast content.

- **BBC standards.** Our role in ensuring the BBC's TV channels, radio stations, the BBC iPlayer and BBC Sounds meet appropriate standards will also continue, as will our oversight role in relation to the content of BBC websites. For the BBC, audiences are typically required to follow a 'BBC-first' process where a complaint can be brought to Ofcom if the complainant is not satisfied with its resolution by the BBC.[9] We will be examining whether the current complaints system continues to serve audiences as part of our review of BBC regulation.

- **Advertising.** To protect audiences from potentially harmful or offensive content in TV and radio advertising, Ofcom has a co-regulatory arrangement with the Advertising Standards Authority (ASA), the UK's advertising regulator. This arrangement benefits audiences by providing them with a single point of contact for raising concerns about advertising. We will also prepare for the introduction of new statutory restrictions on the advertising of products high in fat, salt and sugar (HFSS) that will apply to TV advertising, as well as to on-demand and online advertising. Subject to parliamentary process these restrictions are expected to come into effect in January 2023. Noting that DCMS has recently launched a broader consultation on the regulation of online advertising, we will continue to work with the Government to ensure that advertising regulation across different media remains coherent and effective.

3.32   In addition to our work protecting audiences, we also help to secure a wide range of television and radio services through our licensing and our support for TV and radio platforms. We also work to ensure that all audiences - including disabled people - can access TV services. This work will include:

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[9] This does not apply for Fairness and Privacy complaints, which can be made directly to Ofcom.

- **Licensing TV and radio broadcast services.** We will continue to issue, manage and maintain licences for all national and local commercial TV, digital commercial and digital community radio services, and restricted service analogue radio services. We will continue to respond to stakeholder requests to make changes to those licences where appropriate. In terms of new licensing, we will generally continue our focus on digital services.

- **Supporting platforms for broadcast services.** We will expand listener choice by licensing new small-scale DAB digital radio services throughout the UK, and renew the licences for the multiplexes which carry local DAB and Digital Terrestrial TV (DTT) services. Alongside this, we will continue our work on community and commercial radio coverage improvements and extensions for existing analogue services, where resource allows. We will also continue our work on the delivery of TV and audio content over IP.

- **Accessibility of content to disabled people and those with sight and/or hearing impairments.** It is important that TV and on-demand services are accessible to all audiences. We will continue to enforce requirements for broadcast "access services" - subtitles, audio description and signing. In July 2021 we made further recommendations to the UK Government on how these requirements could work for on-demand services, including when on-demand services should be exempt from requirements, and how they should be enforced. This year we will work with the UK Government to introduce these new accessibility requirements. We will continue to monitor and publish information on the accessibility of broadcast and on-demand programme services to people with sight and/or hearing impairments.

Establishing regulation of online safety

We want everyone in the UK to be able to lead a safer life online. We will use our existing powers to regulate video-sharing platforms, and continue preparations for new, wider powers to improve online safety.

3.33   For most of us, using online services has become second nature and is a fundamental part of our day-to-day lives. Whether watching videos on YouTube, checking Twitter for news updates or chatting with friends on WhatsApp, the influence of online services is everywhere. In 2020, we spent an average of 3 hours 37 minutes a day on smartphones, tablets and computers.[10]

3.34   Online services have brought about many changes valued by the public, but they also carry a risk of harm to individuals. For instance, our research found that 70% of those who view social video services had seen or experienced something potentially harmful.[11]

76% of UK internet users said they have been exposed to at least one potential harm online in the last year, with **more than half** of 12- to 15-year olds saying they had had a negative experience online in 2020.

3.35   To ensure that everyone can lead a safer life online, the UK Government is putting in place online safety legislation, which will be overseen by Ofcom. The Online Safety Bill, which will establish the regime and give Ofcom new powers, was published on 17 March 2022 and is currently undergoing parliamentary scrutiny.

3.36   The Bill focuses on services which enable the sharing of user-generated content, search services and pornography providers. It will enable us to shine a light on the steps online platforms are taking to protect users from harm and hold them to account where they are not doing enough. More specifically, it will require platforms to assess the risks of harm posed by their services and take proportionate steps to address illegal content and content that is harmful to children. It will also require large services that pose the greatest risk of harm to be clear about what they are doing to address the risks of harm to all users,

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[10] Ofcom, June 2021, Online Nation: 2021 report.
[11] Ofcom, June 2021, Online Nation: 2021 report.

including adults. We will have powers to take action where platforms do not fulfil their duties – including the ability to issue fines of up to £18m or 10% of platforms' annual revenue (whichever is the greater). The regime is focused on ensuring platforms put in place appropriate systems and processes, not on Ofcom reviewing individual pieces of content. Ahead of the implementation of the wider online safety regime, the regulation of UK-established video-sharing platforms (VSPs) is now fully in place.

Embedding the regulation of VSPs

3.37   The UK was the first country to transpose the EU-wide Audiovisual Media Services Directive into law, making Ofcom the regulator of UK-established VSPs.[12] Earlier this year we published both our plan and approach to VSP regulation[13] as well as guidance to industry.[14] As part of this regulation, this year we will prioritise:

    a)   reducing the risk of child sexual abuse material (CSAM)

    b)   tackling hate and terror

    c)   protections for under-18s

    d)   age verification on adult VSPs

    e)   reporting and flagging processes of VSPs.

3.38   In Autumn 2022 we will publish our first annual VSP report, assessing progress against these aims and enabling users to see how their services are working to tackle harm.

3.39   We have also recently published our statement setting out how we intend to work with the UK's advertising regulator, the ASA, to ensure users are protected from potential harms arising from advertising appearing on VSPs.

Preparing to regulate online safety

3.40   We will use our work regulating UK-established VSPs as a springboard for the wider set of powers we will gain from this Bill, while engaging with those platforms we already regulate so they are prepared to meet the duties placed on them.

3.41   Ensuring users can live a safer life online is a priority for us. With this in mind, preparing to regulate online safety will be a major focus in 2022/23.

3.42   We have highlighted five focus areas in advance of gaining our online safety powers:

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[12] VSPs are a type of online video service where users can upload and share videos with members of the public, such as Snapchat, TikTok and Twitch.
[13] Ofcom, October 2021, Video-sharing platforms: Ofcom's plan and approach.
[14] Ofcom, October 2021, Guidance for video-sharing platform providers on measures to protect users from harmful material.

- **Supporting the legislative process.** Over the coming year we will support the legislative process by providing advice to the UK Government and Parliament on the workability and effectiveness of our proposed powers and duties.

- **Developing our regulatory approach.** To implement the regime, we will need to consult publicly on a range of matters, including the codes of practice that will set out recommended steps for platforms to comply with their legal duties. While we can only formally consult after we have been granted the necessary powers under the Online Safety Act we aim to do so as soon as possible after the Act has come into effect. Over the next year we will publish a range of pieces of research and analysis on matters relevant to our existing functions in respect of media literacy and VSP regulation, which will help us to build our knowledge and expertise in preparation for consultation on online safety matters. In 2022/23, we will publish further details on our plans to implement online safety regulation.

- **Building public awareness of our proposed future role.** We will communicate our approach to developing the online safety regime during the legislative process, engaging extensively with parliamentarians, industry, civil society, expert and representative bodies and the public. Next year we will build on and broaden our existing engagement with major services that are expected to be within scope, to build knowledge and understanding of the steps that should be taken to improve online safety and to help industry prepare for regulation.

- **Setting up our operation.** A major focus in the coming year will be developing the right capabilities to fulfil our new role. There are a number of strands to our work in this area. We are in the process of recruiting new colleagues to build the capacity and expertise required, while updating organisational processes to support this. We have made considerable progress over the past year and have recruited from a range of organisations such as Amazon, Google, the Internet Watch Foundation and the NSPCC. Following the opening of our Manchester hub, we will continue to develop our operational capability over the coming year.

- **Investing in technology, data and sector knowledge.** We will strengthen our programme of research into the behaviours and experiences of internet users, the dynamics and incentives of online platforms, and the tools and technologies that can impact the safety of internet users. We will develop our physical and information management infrastructure and information technology roadmap. We will continue to strengthen our expertise in data engineering and analytics and will explore the potential to use existing and new quantitative research techniques to assess the prevalence and sources of online harms, as well as the effectiveness of measures taken to protect users.

3.43   In addition to the work described above, we are undertaking other initiatives related to online safety next year:

- **Our Making Sense of Media (MSOM) programme.** Promoting media literacy is a key tool in our principal duty to further the interests of citizens and consumers and will be critical to our future functions as the online safety regulator. We re-launched our

online media literacy programme in December 2021[15], to explain our plan of work, with the goal of promoting people's ability to participate effectively and stay safe online. We are organising our programme of work under the following five pillars:

- *Engage* – There is an online media literacy sector across the UK that is already undertaking a substantial amount of work. We will make a material contribution to this sector, rather than replicating what others are already doing.
- *Initiate* – We will support the sector by commissioning initiatives to serve specific cohorts in communities recognised as having particular media literacy needs.
- *Establish* – We will seek to establish best practice design principles for media literacy.
- *Evaluate* – We will produce guidance on media literacy evaluation and create an evidence base on what works.
- *Research* – We will continue to provide a solid and innovative evidence base to inform our work and that of the media literacy sector.

- **Stepping up our collaboration with other regulators and wider partners.** As discussed in 'Developing partnerships' below, we are continuing our pioneering joint working with other digital regulators through the Digital Regulation Cooperation Forum (DRCF), as well as sharing knowledge with global regulatory partners and others on the most effective ways of improving online safety. As part of our collaboration with the Information Commissioner's Office (ICO) under the DRCF, we are building common, coordinated approaches to ensure coherence between our VSP regulation and the ICO's Children's Code, such as on age assurance. We will also continue to work with the Financial Conduct Authority (FCA), the Competition and Markets Authority (CMA), government and law enforcement to explore how the online safety regime might contribute to efforts to reduce a range harms, in particular online fraud and scams.

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[15] Ofcom, December 2021, Ofcom's approach to online media literacy.

Underpinning wider work across the sectors we regulate

Our programme of policy work is underpinned by a number of important activities and specific programmes.

- **Market research and intelligence.** All our work is underpinned by our understanding of the markets we regulate. We research communications markets and consumer preferences and behaviour to provide an up-to-date, thorough understanding of people and businesses and have a duty to undertake and make public our consumer research. We continue to explore innovative research methods including through our own online panel, passive measurement opportunities, our expanding behavioural insights programme including gamification, as well as research into broadband performance. We combine this research with data collected directly from industry and third parties. We make our data and insights available publicly, through reports, interactive datasets and APIs[16], including Connected Nations, Media Nations, Online Nation, Comparing Service Quality, Home Broadband Performance, Mobile Matters, Pricing Trends for Communications Services, News Consumption, Adults' Media Use and Attitudes, and Children's Media Use and Attitudes.

- **Behavioural insights.** We have established a Behavioural Insights Hub to build a deeper understanding of how consumers make decisions, the barriers and drivers shaping their behaviour and ways to encourage better user engagement and decision-making. This work runs across our remit including online safety, broadband and mobile telecoms. To bring behavioural science into policy making, we use a range of tools to understand consumer and business behaviour and to measure what works, including field trials and online testing.

- **Economics and technology papers.** The purpose of our ongoing economics discussion papers series is to encourage debate on all aspects of media and communications regulation and to contribute to the evidence base used to create rigorous evidence to support our decision-making. We also publish papers that look at the key issues and trends in the area of technology such as our recent Technology Futures and Internet Futures papers. These papers aim to develop our knowledge base and to contribute to the wider debate on the themes covered. We will publish further papers in the coming year on topics of strategic importance to our sectors.

- **Innovation.** We want to foster an environment where innovation flourishes, both in the sectors we regulate and within Ofcom. To achieve this, we will develop a deep understanding of innovation in our sectors and facilitate greater innovation in the markets we regulate and beyond. For example, we will continue to develop the SmartRAN Open Network Interoperability Centre (known as SONIC Labs) in partnership with Digital Catapult. This facility allows us to test and validate interoperability of open network equipment from existing and emerging suppliers. This year we will expand the testbed to include an outdoor deployment that will enable us to test a range of scenarios relevant to real-world mobile networks.

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[16] An application programming interface (API) is an easy way to share data between computers.

- **Sustainability and climate change.** In order to have networks and services that are fit for the long term, it is vital that communications companies invest to put themselves on a sustainable footing. This requires communications companies to increasingly consider their environmental sustainability. It is encouraging to see many of our regulated firms committing to reduce their own environmental impacts, while delivering services and networks that enable the UK to become more efficient, productive and empowered to tackle the broader environmental challenge. We will continue to engage with our sectors on sustainability, and how we might contribute to the momentum towards achieving the UK's net-zero carbon target.

- **Data engineering and analytics.** Much of our work is underpinned by evidence in the form of insight and analysis derived from data. Our Data Innovation Hub provides central leadership and advice to specialists throughout the organisation on how we can do more with increasingly complex datasets and the information gathered from stakeholders. In the coming year we will continue to strengthen our data capability, both within the Hub and in our policy teams, to enable us to take advantage of advanced engineering tools and analytical approaches and to better understand how we and our stakeholders use data to deliver services to people and businesses.

- **The Information Registry.** The Information Registry is a central team which provides expertise and operational support for Ofcom's data gathering from stakeholders across Ofcom's work, as well as preparing to support the implementation of new regimes at different stages, for example the VSP, online safety and telecoms security regimes. The Information Registry has a role in coordinating formal information requests and working with stakeholders on the timing of our planned requests and feedback on information gathering.

- **Enforcement.** The enforcement function supports the delivery of effective policy and compliance outcomes, including by using targeted enforcement action where appropriate to protect consumers or address compliance breaches. This includes supporting the development of legislation and regulatory policy, as well as supporting stakeholders to understand how to comply with their regulatory obligations.

- **Evaluating the impact of our work.** Understanding the impact of our regulation on outcomes for consumers is an important aspect of making sure we are delivering for people in the UK. We will continue to assess the impact of our work through our on-going programme of ex-post evaluation.

4. Strengthening Ofcom for the future

4.1   With the major shift towards online services, and as Ofcom takes on new regulatory regimes (online safety, telecoms security), the organisation is going through significant change. The nature of the issues we seek to address and the global nature of many of the businesses we will be regulating means further change. This will require us to have the right skills and capabilities, as well as working collaboratively with a range of domestic and international partners. Continuing work we have already begun, over the coming 12 months we will seek to deepen our expertise while growing our relationships with existing and new partners to make sure Ofcom continues to remain an effective regulator.

Growing skills and capabilities

4.2   To deliver good outcomes for everyone, we need to continue to strengthen our organisational capability. We will continue to diversify our workforce, both geographically and in the skills and expertise we have, to meet the upcoming regulatory challenges. Key developments in the coming year will include:

- **Embed skills in data analytics and digital and technological developments.** We welcomed our new Chief Technology Officer, Sachin Jogia, in October 2021 from Amazon and over the coming year he will oversee the growth of our technology, data engineering and analytics functions.
- **Add to the diversity of thought at Ofcom.** We will also build on progress we have made to recruit the policy and commercial expertise needed to turn insights into meaningful action. We have brought in colleagues from companies like Amazon, Google and bodies such as the Internet Watch Foundation and NSPCC. Over the next year we will recruit colleagues with the right experience to contribute to upcoming policy challenges. Secondments will also make an important contribution.
- **Build and strengthen our North of England hub.** Last year we opened a new office in Manchester, as a hub for tech skills and our work on online safety and network security. This year we will continue recruiting in these areas, with many roles based in Manchester. We will also be looking to grow in Edinburgh, Cardiff and Belfast to ensure that we represent all parts of the UK and attract the best talent the UK has to offer.
- **Realise the ambition of our organisational diversity and inclusion programme.** It is essential that Ofcom's culture is inclusive and that our workforce is representative of all of the UK's nations, regions and communities, so that we can deliver the best outcomes for consumers and citizens. This year we will publish the first of our diversity and inclusion strategy progress updates in Q2 2022, and we will continue to work towards the workforce targets we set ourselves and the programme of work we laid out.

Developing partnerships

4.3   We will continue to build relationships with regulators, businesses, expert bodies and governments in the UK and around the world so that we can continue to learn and exchange best practice. Through these partnerships we will seek to improve our understanding of our sectors and the ways in which we can serve people in the UK. This will include a range of work:

- **Continuing to work with fellow digital regulators through the Digital Regulation Cooperation Forum (DRCF).** The DRCF was established in 2020 by the CMA, ICO and Ofcom – with the FCA joining as a full member in April 2021. It is a direct response to the regulatory challenges posed by operating in a highly converged digital world, where delivering effective outcomes requires us to develop a shared understanding of the key drivers of change (for example the development and use of algorithms) and how we can most effectively cooperate across our respective roles in mitigating potential harms and optimising the opportunities that this presents. The DRCF published a first annual workplan in March 2020, committing members to work together on topics ranging from key technological trends to attracting the right skills and capabilities. In November, Gill Whitehead joined the DRCF as Chief Executive. Working with the Chief Executives of the DRCF's members, she will oversee the delivery of the second annual workplan, due to be published in April 2022, and lead the DRCF's engagement with domestic and international stakeholders.

- **Making Sense of Media Advisory Panel.** In 2019 we established an expert panel of advisors to provide input to us on our Making Sense of Media programme, discussed in our 'Establishing regulation of online safety' theme. The current members of the panel represent a range of perspectives, from non-profits (like UNESCO and Internet Matters), businesses (like Google and Facebook), and academics.

- **Law enforcement and intelligence community.** We will strengthen relationships with law enforcement and the intelligence community with regards to our online safety, telecoms security and spectrum responsibilities. This includes organisations such as the National Crime Agency, the Metropolitan Police, the City of London Police, Police Scotland and GCHQ.

- **UK Regulators Network (UKRN).** We work with other UK regulators to address common challenges across different sectors and to share best practice as a member of the UKRN. In particular, we will continue to contribute to joint policy work with the UKRN to improve outcomes for vulnerable consumers.

- **Telecoms security framework.** We will continue our close working relationship with the National Cyber Security Centre (NCSC) in the area of telecoms network security.

4.4   We will invest in our international relationships across the sectors we regulate. Our work in this area includes:

- **Collaboration with regulatory counterparts, academic experts and civil society, including through multi-stakeholder engagement.** We will continue to cultivate our international relationships and explore new ones, exchanging experiences and best

practices across all our regulated sectors. In particular, we will continue our dialogue both with European counterparts and beyond, to help ensure that emerging online regulation in our respective jurisdictions develops in a way that is compatible and enabling of future cooperation. The UK is among the first countries in Europe to transpose VSP rules into national law, and we will be working closely with EU regulators to help ensure a level playing field for VSPs operating across our respective jurisdictions.

- **Global engagement.** We will continue to represent the UK at the International Telecommunication Union (ITU), coordinating the use and management of radio spectrum and satellite orbits, the development of technical standards for telecoms/ICTs, and the delivery of assistance to developing countries in capacity building for telecoms/ICTs and in closing the digital divide. In 2022, the ITU will host two global conferences: the World Telecommunication Development Conference (WTDC) for the development sector and its quadrennial plenipotentiary conference (setting overall policy).

5. Delivering good outcomes for consumers across the UK

5.1   Ofcom's principal duty in carrying out its functions is to further the interests of citizens in relation to communications matters and the interests of consumers in relevant markets, where appropriate by promoting competition. It is important that we set out the consumer outcomes that we would like to see delivered by our sectors when considering our plan of work, assessing how well we have delivered on our objectives, and thinking about where more can be done.

Consumer outcomes measures

5.2   We set out in Section 3 the work we will undertake in our priority areas. We include below a list of indicative measures that will help us to assess how well our actions have supported positive outcomes for consumers. These measures are designed to be ambitious and, in many cases, might take a number of years to deliver. This list is not exhaustive; we may consider a range of other factors when assessing whether we have delivered on our objectives.

5.3   We will report on our performance against the outcomes in our annual report, and continue to publish a wide range of more detailed outcome measures.

Strategic priorities	Measures we want to see/monitor
Investment in strong, secure networks	• Significant investment in fixed and mobile networks needed to deliver the experience consumers expect in the mid to long term. • High levels of customer satisfaction with service. • Increased number of homes with more than one gigabit-capable network available. We will monitor: • Gaps in network resilience standards and best practice. • Compliance with the telecoms security framework.
Getting everyone connected	• A reduction in the number of homes unable to get 10Mbit/s broadband. • Increases in the proportion of the UK that receives good quality mobile coverage from the mobile network operators. We will monitor: • Royal Mail's quality of service together with the financial sustainability and efficiency of the universal postal service. • Wider market developments and competition reflecting the continued growth in the parcels market and decline in letters.
Fairness for customers	• High levels of customer satisfaction with value for money. • High levels of satisfaction with how complaints are handled.

	We will monitor:
	• The proportion of out-of-contract customers and how much they pay compared to in-contract customers.
	• Customer engagement indicators, for example the proportion of customers re-contracting or switching.
	• The proportion of people who have difficulties being able to afford communications services.
	• The extent to which providers are compliant with the rules and guidance Ofcom has put in place to protect consumers.
Enabling wireless services in the broader economy	• Users utilise a broad range of options regarding spectrum availability and access. We will monitor: • Industry adoption of wireless solutions.
Supporting and developing UK media	• A choice of high-quality content, including trusted news and programmes that meet all audiences' needs and interests. • Diverse representation on- and off-screen throughout the TV and radio industry. • Continued investment in a wide range of content, made across the UK.
Serving and protecting audiences	• High levels of audience protection due to content standards. • A wide range of television and radio services appealing to a variety of tastes and interests.
Establishing regulation of online safety	We will monitor: • Measures implemented by UK-established VSPs to protect users. • Levels of user awareness of online tools and their use to protect users from harm online.

Our work across the UK

5.4   Ofcom regulates for the whole of the UK. Our teams in Edinburgh, Cardiff and Belfast ensure that stakeholders across the UK understand Ofcom's work and are given the opportunity to engage with our key consultations. Our statutory national advisory committees advise us about the interests and opinions, in relation to communications matters, of people living in England, Scotland, Wales and Northern Ireland. These committees provide advice to our policy teams and are an important part of our policy formulation process. The views of audiences across the UK are also presented to Ofcom's Content Board, which has experienced members representing each of the UK nations. There is also a statutory requirement for each of the UK nations to have its own representation on the Communications Consumer Panel, which pays particular attention to the needs of older and disabled people, people in rural areas and those on low incomes.

5.5   We are committed to having a workforce which is representative of the population of the UK. Alongside our Manchester office, where we are growing our presence in the North of

England, we are continuing to grow our presence in our offices in Edinburgh, Cardiff and Belfast.

Common challenges

5.6   There are unique aspects to the way communications services are provided and received in Scotland, Wales and Northern Ireland and some English regions. Communications services should meet the needs of people and businesses regardless of geographical location. For instance, there are many remote and rural areas which pose particular challenges for the provision of fixed broadband, mobile, and postal services. It is also important that national, regional and local broadcasting services should reflect the diversity of audiences across all UK regions and nations.

5.7   Some parts of the UK have delivered strong results on nation-wide priorities with strategies or initiatives that could be shared with other areas that face similar challenges. For instance, the full-fibre availability in Northern Ireland is currently at 70%, which is significantly above the rest of the UK. This poses opportunities to look at the interaction of publicly and privately funded rollout and also to consider industry initiatives to prepare for PSTN switch-off.

5.8   In 2022/23, as outlined in this plan of work, we will publish a number of reports that focus on developments in different parts of the UK:

- Our Connected Nations report and updates assess broadband and mobile coverage and speeds, including variations between rural and urban consumers and in different areas of the UK. We will make this information available to consumers to help them make informed choices.
- Annual reports on media (Media Nations) and on the BBC, including assessing the BBC's performance against its operating licence. Each of these reports addresses issues about delivery to each of the UK's nations.
- Public service broadcasters are required to produce a suitable proportion, range and value of programmes outside of the M25. We publish an annual list of programme titles that the relevant broadcasters have certified were 'made outside London' productions, broadcast during the previous year.
- We will conduct a call for inputs in order to review the information we collect from broadcasters on the diversity of their workforces. This will include plans for a new question on diversity by geographic location, to understand diversity by nation and region of the UK.
- We will also examine how we can help governments across the UK to achieve their relevant net-zero emission targets. We have been working to reduce our own carbon footprint since 2007, and we will explore how we can reduce our footprint further, while challenging industry to play its part too.

Scotland

5.9   In line with our memorandum of understanding (MoU) obligations, we will work closely with the Scottish Government, Committees and Members of the Scottish Parliament as well as the Office of the Secretary of State for Scotland in delivering on our 2022/23 work programme.

5.10   We will provide technical and regulatory advice, as well as relevant data (where appropriate), to help the Scottish Government to deliver its key telecommunications infrastructure projects and ensure as smooth an interaction as possible with other publicly funded schemes. As part of that we will continue to act as an observer on the Scottish Government Shared Rural Network Working Group. We will also work with the Scottish Government on aspects of its broader work programme, including implementation of its Infrastructure Investment Plan and Digital Strategy for Scotland.

5.11   We will fulfil our statutory duties as they relate to MG ALBA (the Gaelic Media Service), appointing a new board member nominated by Highlands and Islands Enterprise during the first half of 2022. We also welcome the commitment by both MG ALBA and the BBC to modernise their partnership agreement and hope that it goes some way to addressing the challenges highlighted by MG ALBA in the Lèirsinn 2021. Should a new agreement be in place in time, we may also reflect on it in our fifth annual report on the BBC.

5.12   We will continue to support the goals for video-sharing platform regulation through engagement with industry across Scotland while also raising awareness of our responsibilities under the Online Safety Bill. As part of this, we will continue to work with governments and relevant agencies to ensure the smooth functioning of the proposed online safety regime in a devolved context.

5.13   Across all of our regulated sectors we will continue to expand and deepen our stakeholder network in Scotland with industry (including the gaming sector), local authorities, academia, law enforcement, the new Consumer Scotland body and the Third sector.

Wales

5.14   We will complete the review of our MoU and we will work closely with the Welsh Government, Committees and Members of Senedd Cymru as well as the Office of the Secretary of State for Wales in delivering on our 2022/23 work programme.

5.15   We will continue to engage widely with stakeholders in Wales to understand fully their priorities and concerns. We will make sure stakeholders have the best opportunity to engage with colleagues across Ofcom on all relevant programmes of work including Ofcom's responsibilities in online safety. In doing this, we will encourage and ensure that stakeholders can communicate with Ofcom in Welsh with ease, thus contributing positively to the Welsh Government's target of reaching a million Welsh speakers by 2050.

5.16   We will support Wales' dynamic creative sector as it continues to adapt in order to meet the changing needs of audiences in Wales in both English and Welsh.

5.17   We will work with those communities experiencing difficulties in accessing good-quality communications services. We will work with industry and provide technical and regulatory advice as well as relevant data (where appropriate) to the Welsh Government to ensure that they have the relevant information and assistance available. In the hardest to reach areas, we will collaborate to raise awareness of alternative technologies that may offer workable solutions for some communities.

5.18   We will provide advice and support to the Welsh Government including its Barrier Busting Taskforce to help reduce obstacles to further roll-out and enhancement of communications networks. We will monitor the progress of the implementation of the Shared Rural Network ensuring that expected benefits are delivered to rural communities. We will continue our dialogue with interested parties to support the deployment of innovative communications technologies ensuring that Ofcom provides constructive support for such initiatives.

Northern Ireland

5.19   We have signed an MoU with the government in Northern Ireland, and hope to have a Northern Ireland Board member appointed by the end of Q2 2022/23. In line with our MoU obligations, we will work closely with the Northern Ireland Executive and Committees and Members of the Northern Ireland Assembly in delivering our 2022/23 work programme. We will continue to support improved connectivity by offering regulatory and technical advice to the Northern Ireland Executive's Project Stratum and Mobile Action Plan. We will also work with industry to encourage the further rollout of full-fibre broadband and 4G and 5G mobile coverage.

5.20   As Ofcom takes on new duties in online safety and network security, we will work with Northern Ireland's tech sector, consumer bodies, the Northern Ireland Executive and government departments to ensure that the new regulations are well-informed and well-understood.

5.21   We will work closely with our counterparts in the Republic of Ireland – ComReg and the Broadcasting Authority of Ireland – and offer advice to the UK Government and consumer bodies to help make sure people and businesses in Northern Ireland continue to benefit from communications services that are provided on a UK-wide and all-island basis.

England

5.22   We will continue to address the diverse communications needs of people in all parts of England. Working with government, local MPs and local authorities we will continue to support the pace of full-fibre rollout to new cities, towns and regions and work with mobile providers to deepen coverage in rural areas. We will maintain a tight focus on the affordability of communications services, recognising that enduring financial pressures will be felt differently in different areas of the country. We will also ensure that postal regulation remains fit for purpose and meets the changing needs of people across all regions, with a particular focus on retaining key protections for consumers in rural areas.

5.23   We will continue to push for greater diversity and inclusion across the media sector so that programmes authentically reflect audiences from all corners of England and the UK. More broadly, we will ensure that regulation across all of our sectors reflects the full range of diversity from across the country. And as we prepare for new online safety duties, we have now launched a new hub in Manchester to further grow our digital and technical expertise.

Ensuring value for money

We will continue to deliver efficiencies and savings

5.24   Since the UK Government's 2015 Spending Review we have achieved real-terms savings consistent with the wider public sector. We aim to be an efficient and effective regulator for a fast-paced communications sector. Ofcom continues to deliver like-for-like, real-terms budget reductions and will continue to increase efficiency wherever we can.

5.25   Over the past decade, the cost of regulation has fallen significantly in real terms. The chart below shows how the Ofcom budget[17] has changed compared to the average household monthly spend on telecoms services, TV, radio and post.

Average household monthly spend vs Ofcom budget
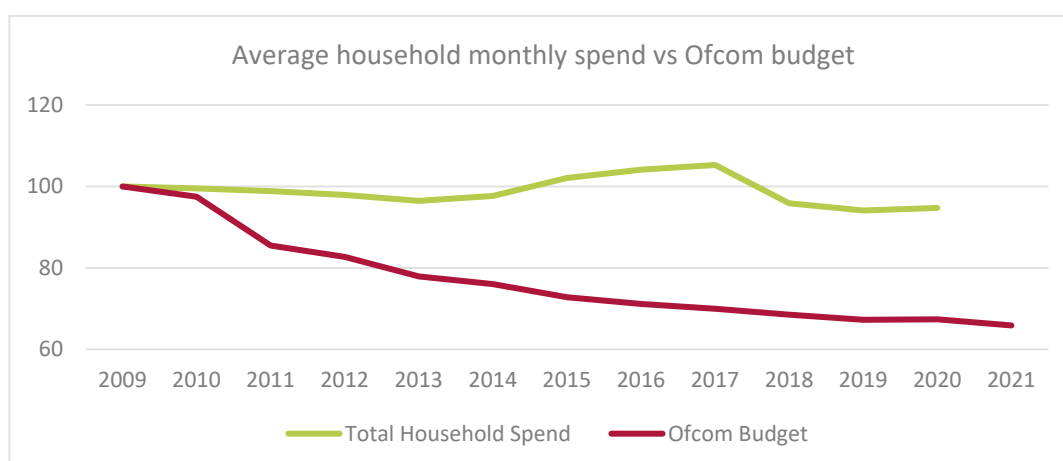
Spending cap for 2022/23

5.26   The UK Government agrees a spending cap for Ofcom's budget. We have agreed a spending cap of £131.9m with DCMS and Treasury for our existing duties, which remains the same as 2021/22, delivering a real term saving of 7%. A further £48.8m has been agreed for the preparation of new duties in online safety, telecoms security and restricting promotions of products high in fat, sugar and salt. Our costs are recovered from both the operators in the sectors and also via retentions of the receipts we collect under the Wireless Telegraphy Act (WTA) for licensing spectrum. All the costs for the preparation of any new duties are funded by the retention of WTA receipts, and not charged to stakeholders. The charges due from each sector will be published alongside our plan of

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[17] Ofcom's budget here and in the chart refers to total Ofcom budget excluding budget for BBC duties and budget for new duties.

work statement in our tariff tables in March 2022. The workplan is reflected in the tariffs we set, and there is no change to the methodology we have used to calculate these charges.

How we will manage our resources in 2022/23

5.27   We continually review how we work to act efficiently and effectively. Where resources are limited, we will make choices guided by our priorities and statutory duties.

5.28   Our resources and skills are aimed at delivering our plans and duties through strategic planning and an integrated approach to our budgets and forecasts. We review priorities, capacity and demand regularly to make sure we can meet our objectives. We also maximise savings by using competitive procurement processes to achieve both the best prices and quality of service from our suppliers. Where there is a need for investment, we will continue to apply tight financial control to maximise the efficiency and effectiveness of the resources we have.

5.29   Improving our offices and equipping our workforce with mobile ICT equipment has enabled a more flexible and agile working environment for our workforce and has enabled us to reduce our London footprint by 39%, saving over £3m per annum since 2019/20. This allowed us to move seamlessly to remote and hybrid working as required as a result of the pandemic.

A1. What we do

A1.1   Ofcom's purpose is to make communications work for everyone. We regulate fixed-line and mobile telecoms, TV, radio, video-on-demand services, post, and the airwaves used by wireless devices. We help UK businesses and individuals get the best from communications services and protect them from harmful treatment and practices. Where appropriate, we support competition as the basis for delivering good consumer outcomes. We act independently from governments and commercial interests to deliver our duties.

A1.2   However, we are accountable to Parliament, and to perform our role effectively we need to engage openly and constructively with the UK and devolved Governments. We provide technical advice to governments (for example, our work regarding the implementation of a UK broadband universal service provider) and in some cases, we act as a formal representative of the UK Government (for example, in international negotiations on spectrum).

Our principal duty is to further citizen and consumer interests

A1.3   Ofcom was established under the Office of Communications Act 2002 and operates under a number of Acts of Parliament. The Communications Act 2003 states that our principal duty in carrying out our functions is to further the interests of citizens in relation to communications matters and to further the interests of consumers in relevant markets, where appropriate by promoting competition. In postal services, our duty is to carry out our functions in a way that we consider will secure provision of a universal postal service in the UK. We implement and enforce communications, competition and consumer protection laws; our competition powers are outlined later in this section.

Our main legal duties guide the direction of our work

A1.4   Our main legal duties in carrying out our work include securing that:

- the UK has a wide range of electronic communications services;
- optimal use is made of the radio spectrum;
- a wide range of high-quality television and radio programmes are provided by a range of different organisations, appealing to a range of tastes and interests;
- people are protected from harmful or offensive material, unfair treatment and unwarranted invasion of privacy on television and radio;
- the BBC is held to account on its compliance with appropriate content standards, its performance against its Mission and Public Purposes, and the impact of its activities on fair and effective competition; and
- the universal service obligation on postal services is secured in the UK.

A1.5   In November 2020, new rules entered into force giving Ofcom responsibility for ensuring that video-sharing platforms established in the UK take appropriate measures to protect consumers who engage with those services from the risk of viewing harmful content. The

Government has announced its intention to appoint Ofcom as the online safety regulator in the Online Safety Bill, which is currently undergoing Parliamentary scrutiny.

A1.6   In November 2021, the Telecommunications (Security) Act 2021 became law. The Act places new strengthened security duties on telecoms providers, with new powers for the Government to set out security requirements and gives Ofcom new responsibilities to make sure providers comply.

A1.7   Ofcom can enforce consumer law on behalf of consumers but does not have the power to resolve individual consumer complaints about telecoms or postal services, unlike in TV and radio. Where appropriate, we provide advice to complainants and refer them to the alternative dispute resolution (ADR) schemes that we have approved.

Ofcom's competition law powers

A1.8   In addition to our regulatory responsibilities set out above, we have powers in relation to communications matters to:

- enforce the prohibitions on anti-competitive agreements and abuse of a dominant position, set out in the Competition Act 1998; and
- investigate markets and make references under the Enterprise Act 2002 to the Competition and Markets Authority (CMA).

A1.9   We consider whether it is more appropriate to exercise Competition Act or sectoral powers in any given case, subject to the specific legislative requirements.

A2. Project work for 2022/23

Project details	Milestones
Consumer information on gigabit-capable / ultrafast broadband. People and businesses need the right information to make informed decisions about the broadband services that are best for them. We have convened an industry working group to develop common terminology for broadband services, including next generation gigabit-capable networks. This work aligns with the recommendations of the GigaTAG working group that industry should look to develop consistent terminology and use cases.	Ongoing
Mobile markets. We will develop our approach to the sector that will underpin our future regulation and support the delivery of high-quality connectivity and innovation to deliver good outcomes for consumers and citizens. We will take a broad look at changes taking place across the sector, including the growing role of the tech giants and the potential for greater fixed-mobile convergence, to consider how competition currently operates and how it is likely to evolve over the next 5 to 10 years. This will be undertaken alongside our mobile spectrum demand project. The review will have two main phases. Phase one will focused on evidence gathering and will included a consultation to invite stakeholders' views. The second phase will build on stakeholder responses to draw initial conclusions and set out any next steps.	Publication Q3 2022/23
Openreach Monitoring Unit. The OMU will continue to monitor BT and Openreach's compliance with BT Commitments, as it remains vital that Openreach and BT continue to operate in a way that is strategically independent from each other. The scope of the OMU's work has been expanded to include the outcomes of the wholesale fixed telecoms market review (WFTMR). We encourage our stakeholders to contact us with concerns relating to the Commitments, but also where they are concerned that there are issues that might act as obstacles to the development of competition in gigabit-capable networks in line with the strategy set out in the WFTMR.	Report Q3 2022/23
Network security and resilience. We will continue to work with the Government to implement our responsibilities under the new telecoms security framework, carrying out our compliance monitoring and enforcement role and issuing guidance for industry. We will also continue to make sure operators of essential services are managing security risks and engage with communications providers to carry out a threat intelligence-led penetration testing scheme (TBEST). We will also work with industry to identify and close gaps in standards and best practice, issue guidance in relation to network resilience and continue the programme of pro-active monitoring of resilient design in current network deployments.	Ongoing

Telecoms vendor diversification. The UK Government is working to ensure a more competitive, diverse, innovative, secure, and resilient supply chain for telecoms. To support this, Ofcom alongside UK Telecoms Lab when it is launched, will work to enable newer vendors ability to test technology in a commercially neutral environment through the SONIC Labs open radio access network testbed. SONIC Labs' aim is to foster the emergence of new solutions, focusing on multi-vendor open, disaggregated and software-centric products, solutions and services. Ofcom will also continue to share our insight and expertise with the Government across diversification issues, including as an observer member of the Telecoms Supply Chain Diversification Advisory Council.	Ongoing
Net Neutrality. The net neutrality framework requires networks to treat all internet traffic on their networks equally and not favour certain websites or services. We will be looking at the framework in order to consider market developments and how we can support innovation whilst continuing to protect customers.	Publication Q2 2022/23
Online markets. We are undertaking an examination of digital markets in the communications sector, including their relationship to the services we currently regulate and the potential for competition issues in such markets. This will inform Ofcom's assessment of the priority for engagement in specific digital markets over the next few years. We expect to provide more detail on the outcome of this review mid-2022. We also expect the joint CMA/Ofcom advice on how a code of conduct might address concerns about the online platforms/content publishers relationship to be published in early 2022.	Discussion document Q1 2022/23
26 GHz Out of band. Following consultation, we will publish our statement on measures to protect earth observation satellite and radio astronomy using the 23.6-24 GHz band from some current and future services in the 26 GHz band.	Statement Q2 2022/23
Award spectrum bands as they are cleared and released. Enable millimetre wave bands to be used for new and innovative services, including 5G.	Consultation Q1 2022/23 Statement Q3 2022/23
Database approach to spectrum management. We will set out our thinking on the potential role automated assignment databases could play in meeting future spectrum management challenges. We will seek input on the range of solutions, challenges and benefits our approach might encounter alongside traditional spectrum management authorisation options.	Consultation Q3 2022/23
2G/3G switch off. We will continue our work exploring the impacts of 2G/3G switch off on all affected parties. We will work with mobile operators to support the process and help make sure issues are identified and addressed with the aim of protecting customers from harm and minimising disruption.	Ongoing

Broadband universal service. The broadband Universal Service Obligation (USO) has launched and we will continue to monitor its delivery by the designated providers (BT and KCOM). Alongside this, we will look to understand how people's connectivity needs have evolved and will do so in the future.	Ongoing
Review of USO telephony services. We will continue our review of the telephony universal service obligations, in particular the provision of public call boxes by BT and KCOM.	Statement Q1 2022/23
Migration to voice-over-IP services. We will work with communication providers to help make sure issues raised by their migration to voice-over-IP services, including the potential future switch-off of the public switched telephone network (PSTN), are identified and addressed with the aim of protecting consumers from harm and minimising disruption.	Ongoing
Home broadband performance measurement. We will publish data on the performance delivered by different residential fixed broadband services and how they vary by a number of factors including technology, service provider, package, geography and time of day.	Report Q2 2022/23
Improving consumer information on mobile coverage and performance. We are undertaking a programme of work to establish how we should report on the availability and quality of mobile coverage to present a consistent picture across 4G and 5G networks. As part of this we will continue working with industry to improve the accuracy and consistency of coverage information Ofcom and the industry provides, and explore how different sources of real-world data can provide consumers with more information about the mobile performance they can expect to receive.	Report Q3 2022/23
Mobile coverage. We will continue to report on progress made to improve coverage under the Shared Rural Network programme and undertake work to check the accuracy of operators' coverage predictions.	Ongoing
Monitoring the postal market and Royal Mail's performance. We will continue to monitor the postal sector as part of our statutory duty to secure a universal postal service, having regard to financial sustainability and efficiency.	Report Q3 2022/23
Review of the future regulatory framework for post. Following a call for inputs, we published a consultation in December 2021 on our review of the regulatory framework for post. The purpose of this review is to ensure our regulation remains relevant and effective during the next review period.	Statement Q2 2022/23
Regulatory Reporting for Post. New regulatory reporting requirements following the review of postal regulation statement	Consultation Q2 2022/23 Statement Q4 2022/23

Affordability of communications services. We will continue to monitor and report on the extent to which households have difficulty paying for communications services, particularly in relation to broadband. We will also continue to monitor the availability, promotion and take-up of targeted tariffs and may take steps to improve this where necessary. We will continue to consider whether any measures are needed to support consumers who are financially vulnerable, and work with the Government to consider the case for support for customers who are financially vulnerable where appropriate.	Ongoing
Supporting vulnerable customers. We will monitor whether providers are treating customers in vulnerable circumstances fairly and giving them the support and services they need. This will include contributing to joint policy work with the UK Regulators Network to improve outcomes for vulnerable consumers.	Ongoing
Consumer protection monitoring and compliance. We will continue to work with providers as they implement new consumer protections relating to contract summary and contract information, contract modifications and right to exit and emergency video relay that will apply from June 2022. We will evolve our focus to monitoring and understanding the impact of these and other consumer protections including voluntary schemes., We will also focus on promoting effective compliance.	Ongoing
Further review of the impact of end of contract notifications (ECN) and annual best tariff notifications (ABTN). We will continue to monitor customer engagement indicators. We intend to carry out a further review of the impact of ECNs and ABTNs in future to understand the extent to which these measures are effective in achieving our objectives.	Ongoing
Implementation of One Touch Switch. Following our decision to introduce One Touch Switch for residential landline and broadband switches, we will work with industry to ensure OTS is implemented successfully by April 2023.	Ongoing
Future of numbering policy review. We will continue our strategic review of the telephone numbering plan to make sure it provides what consumers understand, want and need from numbers for the coming decade. In particular, we will be considering the future of area codes, and 084/087 numbers.	Statement Q1 2022/23
Review of NIICS (number-independent interpersonal communications services). We intend to carry out a review of how consumers use and rely on NIICS, for example for messaging and video calling.	Ongoing

Tackling nuisance calls and scams. We aim to disrupt scams by encouraging telecoms companies to develop technical solutions and will strengthen our own rules on preventing the misuse of communications services. We will work closely with industry, Government and other regulators to make scams harder to perpetrate across the board. We will also help consumers avoid scams by raising awareness and improving information, so people can more easily spot and respond to scams.	Ongoing
Monitoring fairness for customers commitments. We will continue to put pressure on providers to ensure that they treat their customers fairly and deliver services and products in line with the fairness commitments.	Ongoing
Comparing service quality. We will publish our annual report looking at the quality of service provided to residential customers by fixed and mobile telecoms providers.	Report Q1 2022/23
Reporting on pricing trends. We will report on pricing trends in fixed, mobile and pay-TV services. This will include a review of the prices available to consumers buying different types of services and a summary of what, on average, consumers are paying. It will also look at tariff structures and how 'discounted' prices vary from standard or 'list' prices, as well as the difference between in-contract and out-of-contract prices.	Report Q3 2022/23
Mobile spectrum demand. Considered alongside our mobile strategy, our initial conclusions paper will set out our assessment of how demand for mobile services and the UK's mobile networks may evolve in the period to 2035, and whether additional spectrum may be needed.	Statement Q3 2022/23
Electromagnetic fields (EMF) and Health. Following the successful implementation of the requirement to comply with the general public limits based on the International Commission on Non-ionising Radiation Protection (ICNIRP) guidelines in spectrum licences, we will continue to check that licensees are complying. We will also provide further guidance and extend compliance checks to frequencies below 10 MHz and will continue our programme of measurements close to mobile phone base stations, with an ongoing focus on 5G, and enhance these measurements as necessary.	Publication Q3 2022/23
Engaging with industry on wireless and spectrum. We will continue our work to raise awareness of wireless and spectrum in the delivery of digital transformation across different industry sectors. We will continue our engagement to understand and monitor spectrum use and identify unmet demand.	Ongoing
International engagement. We will continue to engage across Europe and globally, alongside UK stakeholders, to ensure that UK interests are appropriately reflected in international spectrum decisions and debates. We will lead UK preparations for the World Radiocommunications Conference (WRC) which will take place in 2023 and will issue a consultation on UK preparations in summer 2022.	Information Request Q1 2022/23

Opening up the 14GHz band. We will explore demand for access to the 14GHz band. We are aware of calls for this spectrum to be made available to support the growing needs of the space sector. We will look at this in more detail alongside any competing demands before deciding how to proceed.	Consultation Q1 2022/23 Statement Q3 2022/23
Upper 6GHz band. Following consultation, we will look to license low power indoor systems in the 6425 to 7070 MHz band that will enable the opportunity to deploy Wi-Fi-like equipment for industry, business and research users. We are aware that there is also industry interest in an authorisation regime that is more suitable for consumer use – for example, for mobile networks or licence exempt Wi-Fi. This is out of scope for this consultation – but we will ensure that our proposals do not prevent these potential future uses.	Statement Q1 2022/23
Space Spectrum Strategy update. Following consultation, which will build on our 2017 strategy and reflect recent changes in spectrum demand from the sector, we will look to make a statement on a new space spectrum strategy. The strategy will explore the actions we need to take to support this sector as it evolves and grows.	Statement Q2 2022/23
Administrative Incentive Pricing. We will continue to review the appropriate fees for the range of spectrum bands where annual licence fees become due following an initial period secured through an award	Consultation Q2 2022/23 Statement Q4 2022/23
Licence variations. We will review the licences for mobile networks and update these where necessary to align the format, terms and conditions across the various spectrum bands that the operators hold. This will include reviewing technical parameters to ensure that these do not inhibit deployment of the most up to date technologies.	Statement Q2 2022/23
Licensing platform evolution. To provide a better online process for our stakeholders and enable us to continue to deliver an efficient spectrum licensing service into the future, we expect to begin migrating across to the new system starting with our simpler, but highest volume licences during this period.	Other Q4 2022/23
Spectrum business sector reviews. We are reviewing the role of spectrum in supporting energy distribution networks to meet Government targets on carbon neutrality and manage new distribution models. We will also update our satellite and space strategy as detailed below and consider the drive for higher capacity systems in the fixed wireless services (FWS) sector, particularly in the higher bands above 92 GHz as part of our Terahertz spectrum discussions.	Ongoing

Enabling growing demand for the use of drones. We will explore spectrum and authorisation options to support growing demand for beyond-line-of-sight drone use which can be used for a range of applications such as delivering medical supplies and monitoring traffic systems. We will work with the Civil Aviation Authority (CAA) to make sure we have a joined up regulatory framework.	Statement Q3 2022/23
Commonwealth Games, Birmingham, 2022. We will support the Government and the Commonwealth Games Organising Committee in delivering a successful games at Birmingham in 2022. We will plan, license and monitor spectrum and provide interference management at the games with a test and tag regime for compliant wireless equipment, monitoring equipment and engineers deployed to resolve live issues.	Other Q2 2022/23
Material changes to the BBC public service activities. We will continue to monitor the BBC public service activities to ensure any material changes have appropriate regulatory scrutiny if required.	Ongoing
Monitoring the BBC's commercial activities. The BBC's commercial activities are required to earn a commercial rate of return over an appropriate period to ensure that public money is not used to finance loss-making commercial activities. We require the BBC to report on the financial performance and target rates of return for each of its commercial subsidiaries and each line of business within its commercial subsidiaries. We will also continue to monitor the BBC's compliance with our requirements in relation to operational separation and transfer pricing.	Ongoing
Ofcom's annual report on the BBC. We will set out how we have carried out our duties and assess the BBC's compliance with the specified requirements in its operating framework and operating licence. We will also publish a report measuring the BBC's performance in meeting its mission and public purposes across its public services.	Report Q3 2022/23
Future of BBC regulation. As we near the mid-point of the current BBC Charter period, we are required to produce a 'Periodic Review' of the BBC. We plan to use this opportunity to build on the conclusions of Small Screen: Big Debate, and reflect on our BBC regulation over the last four years to ensure it remains fit for purpose in holding the BBC to account on behalf of viewers and listeners.	Report Q2 2022/23

Review of the BBC Operating Licence. We are considering how the BBC's Operating Licence needs to evolve in light of changing audience needs and expectations. Our consultation in the spring will set out specific proposals for changes in light of the principles discussed in our "review of BBC regulation" consultation in July 2021. Specifically, we envisage that the Licence should enable us to hold the BBC to account for its delivery across all services, including online; that the Licence should give the BBC more scope to determine how best to fulfil its Licence obligations across its platforms and services; and that the Licence should enable Ofcom to hold the BBC more effectively to account by requiring greater transparency and more effective reporting from the BBC.	Consultation Q1 2022/23 Statement Q3 2022/23
Channel 3 and Channel 5 relicensing. We will deliver a Section 229 report to the Secretary of State, which we have to provide by June 2022. This will set out our opinion as to whether the existing Channel 3 and Channel 5 licence holders will be able to contribute, at a commercially sustainable cost, to the fulfilment of the public service purposes over the next licence period (ten years from 1 Jan 2025).	Report Q1 2022/23
Responding to Channel 4 Corporation's annual Statement of Media Policy. We will publish our response to Channel 4 Corporation's delivery of its media content duties and plans for the following year as set out in its statement.	Report Q2 2022/23
Public service broadcasting programme. Following our review of public service broadcasting, 'Small Screen: Big Debate' in 2021, we will continue to work with industry and the UK and devolved governments on how our recommendations could be implemented and how we ensure audiences can continue to enjoy a range of original UK content, on broadcast services and online.	Ongoing
On demand programme services (ODPS) accessibility code. We expect the Government to introduce regulations requiring providers of On-Demand programme services to make them accessible to people with sight and/or hearing impairments. We will then consult on and publish a code giving guidance on meeting the requirements. The requirements are likely to involve providing subtitles, audio description and signing alongside programmes. We will also be revising our best practice guidance in relation to broadcast accessibility to update it and to include guidance specific to On-Demand services.	Consultation Q1 2022/23 Statement Q2 2022/23
Monitoring diversity and equality of opportunity in broadcasting. We intend to publish a call for inputs to inform how we refine our approach to diversity data collection and will therefore suspend our usual reporting process in 2022. Instead, we will collect and report on two years' data in 2023, when we will also revise our diversity in broadcasting questionnaire. Our report will provide a picture of how well individual TV and radio broadcasters – and the industry as a whole – are promoting equality of opportunity, diversity and inclusion within their organisations.	Call for input Q2 2022/23

Future of Media Plurality in the UK. Media plurality is the cornerstone of a well functioning democracy. As more and more consumers obtain their news online, from a variety of intermediaries, we will report on the role and impact of those intermediaries on plurality in the UK	Publication Q3 2022/23
HFSS advertising: Health & Care Bill. Introduced into Parliament in July 2021, the Health and Care Bill sets out new restrictions on advertising for food and drinks that are high in fat, salt or sugar (HFSS), including a pre-watershed ban on TV and On-Demand programme services advertising such products. Ofcom and its co-regulators (BCAP and the ASA) will be required to administer these restrictions. The legislation also includes provisions in relation to HFSS advertising on online services.	Ongoing
Small-scale DAB. We will continue to advertise and award licences for small-scale radio multiplex services, and grant licences for community digital sound programme services, to greatly expand listener choice throughout the UK. The small-scale DAB programme will enable the launch of around 200 multiplexes, covering all four UK nations. We expect these to broadcast a range of radio services, ranging from grass-roots community services to specialist music stations, and services aimed at minority groups and other under-served audiences.	Ongoing
Video-sharing platform regulation. The new Audiovisual Media Services Regulations 2020 introduce requirements for UK-established video-sharing platforms (VSPs) to take appropriate measures to protect children from harmful content and to protect the general public from content containing illegal material and incitement to violence or hatred. VSPs also need to ensure certain standards around advertising are met. In October 2021 we published a VSP plan and approach document which set out our aims for the regime and our plans for the year 2021-22. Our five areas of focus include work on child sexual abuse material; hate & terror; protection of under 18s; age verification and reporting & flagging. We will update on this work, as well as providing users with information on platforms' safety measures, in our annual VSP report.	Report Q3 2022/23
Preparing to regulate online safety. In March 2022 the UK Government published the Online Safety Bill which includes new duties for Ofcom to regulate online services. We are currently preparing for this new role. In 2022/23 we intend to publish a document setting out our plans for taking on these new responsibilities. We also envisage publishing a series of pieces of research relating to online safety over the course of the year.	Publication Q1 2022/23
Making Sense of Media. We will continue our work to help improve the online skills, knowledge and understanding of UK adults and children. We will be progressing our work in five complementary areas, as set out in our approach to online media literacy document published in December 2021.	Publication Q1 2022/23 Publication Q2 2022/23

Digital Regulation Cooperation Forum (DRCF). We will continue to work together with the CMA, the ICO and the FCA to support a coherent regulatory approach to online services and issues. The DRCF will publish its annual workplan that will outline the key areas of focus for the DRCF in 2022/23. This will include our joint horizon-scanning function that was launched in November 2021 and other key priorities for our cooperation over the year.	Ongoing
Annual diversity report. In Q2 2022/23, we will publish our annual diversity report, detailing diversity, inclusion and equality at Ofcom. It looks at the diversity profile of colleagues at Ofcom overall and in areas such as pay, recruitment, performance and promotions. The report will explain our gender, ethnicity, and, for the first time, disability pay gap data for 2020/21. The report helps us to determine our strategic diversity and inclusion priorities and objectives for the coming year.	Report Q2 2022/23
Transforming Ofcom's capability in data engineering, science and analytics. We will continue to contribute to data engineering and science initiatives and support colleagues around the organisation to maximise insight and efficiency from data related activities. In addition to using innovative tools and processes to support policy and operational delivery, we will review emerging technologies and methodologies to make sure we remain at the forefront of understanding in this complex area.	Ongoing
Continuing to innovate our regulation to help consumers and businesses. We will research and adopt creative and innovative approaches to our regulatory work, both in new areas of regulation and in reviewing existing approaches. We will continue to focus particularly on enabling creative thinking in a hybrid working environment, partnering with other regulators to adopt best practice.	Ongoing
Developing Ofcom's understanding of emerging and disruptive technologies and the roles they play in delivering services to consumers and businesses. We are seeking to understand, by engaging with technologists in academia and industry internationally, the potential impact of technological innovation on the sectors we regulate, including evolutions of known technologies and radical new technologies. These include technologies such as artificial intelligence (AI), quantum communications, new computing architectures and new materials.	Ongoing

Developing Ofcom's understanding of the technologies used to deliver online services. We are building Ofcom's capabilities in online technologies to support the increased relevance of these to our role in regulating VSPs and potentially online harms and in the cloudification of telecoms and broadcast networks. We have created a new knowledge management framework to keep abreast of fast-paced developments in this area, commissioned several external research projects to build our knowledge of the key technology areas and built links with the emerging SafetyTech industry. We plan to publish a series of discussion papers exploring the potential implications of key technologies.	Ongoing
Carbon footprint reduction. With the aim of gaining an ISO14001 certification by Q1 22/23, and as part of our Reduce, Reuse, Recycle initiative, we will look at the following: environmental management to be more prominent within the organisation's strategic direction; the implementation of proactive initiatives to protect the environment from harm, such as sustainable resource use and climate change mitigation; the addition of a stakeholder-focused communication strategy; and easier integration into other management systems.	Report Q1 2022/23
Sustainability and Climate change. We will continue engaging with our industry stakeholders to understand their approach to running their businesses sustainably, including how they affect the environment, and are affected by both environmental change and wider societal efforts to become more sustainable. We will continue to consider how our sectors might contribute to the momentum towards the UK's net-zero carbon target.	Ongoing
Ex-post assessment programme. Understanding the impact of our regulation on consumer outcomes is an important aspect of ensuring that we are delivering for people in the UK. We will continue to assess the impact of our work as part of our 2022/23 work programme through our programme of ex-post evaluation.	Ongoing
Consumers' behaviour and experience of using mobile services. We will use crowd-sourced data to examine how people are using mobile phone services and the quality of performance provided to them by mobile network operators.	Report Q3 2022/23
Connected Nations. We will continue to report on the availability and use of broadband and mobile networks in this annual update, which also features a version for each of the nations of the UK.	Updates Q1 & Q2 2022/23 Publication Q3 2022/23
Media Nations. We will publish our annual report on key trends in the television and video, and the radio and audio sectors, which also features a version for each of the devolved nations.	Report Q2 2022/23
Online Nation. We will publish our annual report on what people are doing online, how they are served by online content providers and platforms, and their attitudes to and experiences of using the internet.	Report Q1 2022/23

Reporting on adults' media literacy. We will publish our annual Adults' Media Use and Attitudes report, looking at media literacy among UK adults. It will include data on the media use, attitudes and understanding of those aged 16 and over, and how these are changing over time. Alongside this, as a complement to our quantitative surveys, we will publish our annual Adults' Media Lives report, detailing the findings from our small-scale, longitudinal, ethnographic qualitative research among UK adults.	Report Q1 2022/23
Reporting on children's media literacy. We will publish our annual Children's Media Use and Attitudes report, providing evidence on media use, attitudes and understanding among children and young people aged 5-15, as well as information about the media access and use of children aged 3-4. The report will also include parents' views about their children's media use, and the ways parents monitor or limit children's use of different types of media. Alongside this, as a complement to our quantitative surveys, we will publish our annual Children's Media Lives report, detailing the findings from our small-scale, longitudinal, ethnographic qualitative research among children and young people.	Report Q1 2022/23