Ofcom's Plan of Work 2023–24

Making communications work for everyone

Contents

1. Foreword

1.1   As Ofcom enters its twentieth year, our mission to make communications work for everyone has never been more essential. The sectors under Ofcom's watch connect, inform and entertain people across the country every day. They also contribute more than £70bn to the UK economy each year.

1.2   So we need to ensure these markets are working as they should, especially at a time when people are struggling with bills and needing good, affordable deals.

1.3   That's why it's important that low-cost tariffs for eligible homes are now available from almost all the main telecoms providers. Superfast broadband and 4G mobile have reached the vast majority of the UK. Full fibre broadband, the ultrafast connections that are fuelling tomorrow's digital applications, is available to around half of homes and increasing fast. And our TV and radio sectors have withstood immense pressures to remain the envy of the world and a central part of people's lives.

1.4   But we need to keep responding to changes in the market – shifting costs, new technologies, changing consumer behaviour and evolving risks, including the need to protect vulnerable customers. Our Plan of Work for 2023-24 is designed to do just that.

1.5   This year we are continuing to group our work under familiar themes: internet we can rely on; media we trust and value; a safer life online; and enabling wireless services in the broader economy. That includes promoting faster, more reliable connections; protecting viewers and listeners from harm; and making final preparations to regulate social media and search apps under the Online Safety Bill that is expected to become law this year.

1.6   Alongside that, we will keep delivering important work – including regulating the postal market and promoting investment across the communications sector.

1.7   One of the most important aspects of our Plan is the engagement we undertake with people and businesses who are affected by our work. That includes the companies we regulate, governments and elected assemblies, charities and civil society groups, academics and other experts.

1.8   We were delighted to host in-person consultation events across the UK in January on our draft Plan. We heard a range of views, from industry bodies outlining technical developments in their sectors to consumer bodies highlighting the impact of rising bills.

1.9   I want to thank everyone who took the time to engage, and the people and organisations who continue to shape our work. And as we put our Plan into effect, we'll keep listening to feedback and make sure our priorities reflect those of the people and businesses we serve.

Dame Melanie Dawes, Chief Executive

2. Overview

2.1   As we look forward to the year ahead, our role as a converged communications regulator – across telecoms, broadcasting, post, spectrum and online services – is more important than ever. This is how people experience communications today: simultaneously as consumers, audiences, users and citizens. Just as online and offline activity becomes blurred, the digital disruption that is reshaping communications and content today is also blind to traditional sector boundaries.

2.2   Over the next year and beyond, our remit will continue to expand to deliver positive outcomes for consumers and the broader economy while minimising potential harms. Already, we have taken on new duties for video-sharing platforms and telecoms security, and the forthcoming Online Safety Bill will give us an important new task and tools for creating a safer life online. As we take on these new duties, this Plan of Work sets out our planned activity to deliver on our mission to make communications work for everyone over the coming year.

Exploring the implications of digital convergence and disruption

2.3   Rapid innovation and globalisation are inherent traits of the telecommunications, media and tech sectors. To regulate this shifting landscape effectively Ofcom has informed its Plan of Work by identifying, prioritising and analysing the key trends through the lenses of consumer behaviour, commercial business models and technological developments. This activity ensures that we set out a clear and forward-looking plan focused on the right priorities as the landscape changes. As part of our medium-term planning, we have conducted extensive horizon-scanning, external interviews and market research in collaboration with industry and external experts.

People increasingly live their lives online

2.4   Consumers are increasingly living their lives online indeed 93% of UK adults have access to the internet at home with the average time spent online, per day, by adults in September 2022 being just under four hours and with the biggest growth now occurring among older users aged 55+ (up by 15% compared to September 2021)[1] allied to an increase in average household broadband data consumption over the past five years. We expect to see continued growth in consumption and reliance upon online services driving an increasing level of expectation that consumers can trust that networks will provide a service they can rely on (fast, affordable, resilient and secure).

2.5   Our consumer research shows people are accessing a broad and growing range of online services across communications, gaming, banking, remote working, ecommerce, video-on-demand, news, access to public services and more. After search, many of the most popular

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[1] *Source: © Ipsos, Ipsos iris Online Audience Measurement Service, September 2022, age: 18+, UK. Note: Measurement of those who are online only across smartphones, tablets or computers only.*

applications are interactive in nature with Meta's social platforms and communications services were used by 97% of UK online adults (and 68% of children), YouTube was used by 91% of adults online (and 88% of children)[2] and online gaming played by 38% of adults (and 57% of children). This activity is rapidly displacing traditional services with improved user experiences. Although not fully defined and with low adoption so far, online virtual worlds (e.g. Metaverse) and augmented realities offer the potential to make our interactions much richer and immersive. While such interactive services are popular and offer significant consumer benefits, there are also challenges as 68% of children (aged 13-17) and 62% of adults (aged 18+) indicate they have experienced at least one online harm in the last four weeks with 46% of users advocating for more online safety measures to be put in place. The potential harms from illegal content and content that is harmful to children, increasing with the rapid growth in reach and use of these algorithmically curated services, is the focus of the Online Safety Bill. Ofcom will build on a strong record on content standards work with platforms to ensure they are taking necessary steps to help people to live a safer life online, while also maintaining freedom of expression.

New commercial business models are emerging

2.6   Both established and start-up businesses continue to reshape the communications sectors through new commercial business models that expand and improve services delivered while evolving how they are monetised. Among traditional telecoms companies, there may be pressures to consolidate as joint fixed and mobile bundles are pushed by 'converged' companies, and alternative fixed network providers mature. Large US media companies continue to invest in content and disrupt the TV market, taking more viewing hours. Public service broadcaster (PSB) share of viewing fell to 58% in 2022 (compared to 67% in 2019) while the costs of TV production increase. This may lead to increased consolidation among media players to compete with the scale needed for aggregation and distribution. Indeed, the lines between traditional and new media are already blurring. In future, media will likely have a broader definition: incorporating a 'long tail' of smaller players producing specific niche content, including podcasts, as well as user-generated content.

2.7   The role of the online tech giants will continue to grow, with greater involvement across the value chain from content production to virtualised network services. As growth among the traditional tech giants matures, they will seek to evolve their monetisation models as evidenced recently by Netflix launching a lower-priced ad-supported tier and Facebook announcing plans to offer a paid-for identity verification ('blue-tick') badge. New players will continue to offer traditional services in disruptive ways or provide completely new services. Monetisation of these new services will be diversified across transactional, subscription, and advertising along with increasing use of data capture. Blurring of activities and monetisation models across the value chain will influence how we think

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[2] Source: © Ipsos, Ipsos iris Online Audience Measurement Service, September 2022, age: 18+, UK. Note: Measurement of those who are online only across smartphones, tablets or computers only.

about regulation and use of our traditional tools and approaches for achieving the desired outcomes in competition and consumer benefit.

New technological developments disrupt the status quo

2.8   Technological changes can help unlock better consumer outcomes, improving choice, price and innovation for consumers. However, the technology driving emerging and future services such as virtual/augmented reality, connected consumer goods, remote sensors and devices will rely on the greater capabilities of full fibre and 5G networks.

2.9   As the demand for connection grows, we expect to see further convergence between different technologies – for example, across mobile, satellite and wired broadband. This will likely see tech giants playing a larger role in communications value chains and networks in general (e.g. edge computing in mobile networks and Content Delivery Networks (CDNs) in fixed networks) enabling the storing and processing of content closer to the user to support enhanced performance. At the same time, network operators will make greater use of cloud infrastructure to perform virtualised network functions, allowing them to deliver more flexible, scalable and cost-efficient networks. These trends contribute to an overall decentralising and more diverse communications infrastructure where user experience is ultimately dependent on a broader digital market ecosystem.

2.10   As networks capable of supporting new services, more reliably and with enhanced cost and energy efficiency are deployed, firms will invariably seek to switch off older technologies. As this important infrastructure upgrading takes place, it is important that customers' experience is not unnecessarily disrupted, and vulnerable customers are protected.

What we will prioritise

2.11   Against the backdrop of our medium-term plan, we are mindful of the nearer-term pressures facing the country in relation to cost-of-living, with inflation recently having hit its highest level for over 40 years. With people experiencing acute and growing financial pressures owing to substantial increases in household bills causing concern, ensuring access to affordable services is a key priority for Ofcom. We are committed to our initiatives to support fairness for customers, and we continue to work with communications providers to promote social tariffs.

2.12   Our priorities for the year ahead focus on delivering three consumer outcomes, as identified last year, alongside our role in managing the UK's scarce radio spectrum resource for efficiency and innovation. We will structure the majority of our work programme under these priorities.

Internet we can rely on

- Availability of high-quality networks where they are needed
- Reliable and secure networks that people can depend on
- People trust the networks and services that they use
- Consumers are confident and able to engage and make choices in the market to get the right services for them
- Consumers are able to access services which are affordable

✓ Continue to **support investment and competition** delivering fast and reliable networks; through proactive implementation of our Wholesale Fixed Telecoms Market Review for fixed networks and promoting more informed choice of mobile services through our work on mobile reporting.

✓ Work with telecoms providers to deliver improvements in **network security** and undertake work on **network resilience** to consider how our duties apply as networks evolve.

✓ Complete our **cloud market study** as part of our broader work to develop our understanding of **digital markets**.

✓ Complete our work to update our **net neutrality** guidance.

✓ Ensure **consumer protection** by embedding our rules and also through voluntary initiatives.

✓ Focus on **affordability** and complete our work examining in-contract price rises.

Media we trust and value

- Audiences can watch and listen to PSB content which is produced across the UK and reflects its diversity
- People can trust the news they watch and listen to – it is accurate, impartial and trusted
- A plurality and choice of wide range of providers and producers competing fairly for audiences
- Audiences protected from harm and freedom of expression safeguarded

✓ Work with DCMS on a **media bill to support the evolution in our approach to regulating** public service media; and take an in-depth look at how the market is serving the interests of children.

✓ Hold the **BBC** to account, including for delivery of its public purposes under the **new Operating Licence**.

✓ Continue to **safeguard trust in news** through our ongoing enforcement of due impartiality and due accuracy requirements as well as through our media plurality work.

✓ Continue our **protection of audiences from harm** to ensure audiences, particularly children, are protected.

✓ Ensure **video on-demand services** comply with requirements around **harmful content** and work with DCMS on proposals for closer **standards alignment to broadcast content**.

We live a safer life online

- Ofcom established as a credible and trusted online safety regulator
- Expected actions are set out to identify and address priority harms online
- Online companies understand what they need to do to put online safety at the heart of how they operate while also safeguarding freedoms of expression
- Users have a clear understanding of what they can do to be safer online

✓ Continue our regulation of **video-sharing platforms**, with a focus on how platforms set, enforce, and test their approach to user safety.

✓ **Implement the online safety regime** once the Online Safety Bill becomes law, including consultation on the regime's regulatory architecture.

✓ **Engage with high-risk or high-impact services** within scope of the new regime.

✓ Extend our **Making Sense of Media** media literacy programme to improve online skills, knowledge and understanding.

✓ **Develop our operational effectiveness**, including by continuing to conduct and publish research, and also through national and international collaboration and partnership.

Enabling wireless services in the wider economy

- "Keeping the lights on" through business-as-usual duties (licensing, planning assurance and compliance)
- Spectrum is available to enable comms industry to meet anticipated growth and innovation in consumer mobile and wireless services
- Spectrum is available to meet specialised needs of key sectors (e.g. utilities, manufacturing, and transport)
- Accommodate more users through sustained improvements in efficiency of spectrum use
- UK interests represented effectively in international negotiations on spectrum allocation and use

✓ Continue to support **network evolution and convergence** to promote competition and innovation.
✓ **Accelerate innovation and spectrum sharing** by evolving our authorisation approach and facilitating collaboration through 'spectrum sandboxes'.
✓ **Improve the gathering and analysis of data** to inform our future spectrum policies in the light of growing demand.
✓ **Increased international leadership** on spectrum management, in particular working with Government to represent UK interests, and leading the UK delegation to the World Radio Conference in 2023.
✓ **Support spectrum users,** in particular by providing more licensing services online and **by investigating harmful interference** and unlicensed or illegal spectrum use.

Delivering on our standing functions

2.13 In addition to the priorities above, we will continue to execute a broad range of functions vital to ensuring "communications work for everyone". In particular, this includes maintaining a well-functioning universal postal service:

- Enhanced **monitoring of Royal Mail's performance,** having regard to financial sustainability and efficiency.
- **Review safeguard caps** for Royal Mail that will apply from April 2024.
- **Examine developments in the broader parcels market**, and the experience of residential and business postal users.
- Continue to **discharge our other functions (e.g. publication of research reports, issuing licences, complaints resolutions, etc.)** to support the priorities above and deliver across the breadth of services valued by consumers.

2.14 Finally, we ensure that our work reflects the specific circumstances of consumers and stakeholders in each of the nations across the UK, particularly through the work of our teams in Edinburgh, Cardiff and Belfast.

Our preparations to deliver these priorities in the year ahead

2.15 To achieve these outcomes, we are investing in both our policy development capability, and in the professions that support our policy groups. These include our technology, data, research and commercial skills, alongside our horizon-scanning capability.

2.16 Success in these areas requires us to keep strengthening partnerships across digital regulation – both domestically, such as through the Digital Regulation Cooperation Forum, and internationally – in order to achieve real change.

2.17   This document sets out our work programme for the year 2023–24, in the context of the issues for people, businesses and our sectors that we have identified both today, and in the longer-term.

3. Our priorities for 2023–24

3.1   As the UK's regulator for the communications sector, Ofcom's vision is to make communications work for everyone. Our duties and functions are set out in a number of Acts of Parliament. Our principal duty is to further the interests of citizens and consumers in relation to communications matters, where appropriate by promoting competition.

3.2   Ofcom must have regard to the UK Government's [Statement of Strategic Priorities](#) (SSP) when exercising its regulatory functions. The SSP, published in 2019, sets out the Government's policy priorities in relation to telecommunications, the management of radio spectrum and postal services. We have had regard to the SSP in developing this programme of work in the following ways:

- **World-class digital infrastructure:** We continue to promote 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. Our priority outcome 'Internet we can rely on' outlines the breadth of work to support this. In addition, our work under the priority outcome '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 the interests of telecoms customers, including those who are vulnerable. Our work directly supports this commitment, and we will continue to work to make sure consumers are treated fairly, are empowered to make choices that are right for them and are protected. Ensuring that people can access affordable services remains a priority for Ofcom, and we are committed to our initiatives to support fairness for customers and to promote social tariffs.

- **Secure and resilient telecoms infrastructure:** Ofcom continues to support the UK Government's commitment to network resilience and security. Under the new Telecoms Security Act, we are responsible for monitoring and enforcing security requirements for the telecoms sector to ensure new networks are designed with security in mind. We recognise the increased variety of risks to our telecoms and digital infrastructure, and resilience continues to be a focus for us.

- **Postal services:** Regulation of post continues to be a core element of our work. This includes reviewing whether regulation of the sector needs to change in light of market developments and evolving user needs.

Our priority outcomes

3.3   The following section outlines our priority outcomes and how they will be supported by our projects and programmes over the course of 2023–24.

Internet we can rely on

Fast and reliable connections and services for everyone, everywhere

Increased demand and adoption of new and future services has driven greater dependence on digital networks, highlighting the need to have networks and services we can truly rely on. This priority outcome is about the networks and services that connect us, on which the whole of society and our economy now depend. Our work here is foundational to all the other outcomes in the communications sector.

3.4   Protecting the interests of consumers and ensuring fast and reliable connections and services for everyone, everywhere is core to what we do and will drive our work over the coming year. Maintaining well-functioning markets will help drive forward networks and services the UK can really depend on. In addition to promoting competition and investment, our work over the next year will focus on making networks and services more secure, resilient, and safer from scammers.

3.5   In undertaking our work to deliver 'internet we can rely on', we seek to achieve the following outcomes for consumers:

- Availability of high-quality networks and services where they are needed.
- Reliable and secure networks people can depend on.
- People trust the services and networks they use.
- Consumers are confident and able to engage and make choices in the market to get the right services for them.
- Consumers are able to access services which are affordable.

3.6   We have previously set out our intention to promote network competition and the fair treatment for customers. Our Wholesale Fixed Telecoms Market Review in 2021 played an important role in promoting competition between networks that is now driving fibre rollout. We also see competition playing an important role in improving mobile quality of service, with better information on network performance enabling consumers to make informed choices about the network that best suits their needs. As part of our Digital Markets programme we will also explore how communications regulation needs to adapt to the digital markets that underpin, and increasingly define, the experience of communications consumers today.

As of Autumn 2022, **68%** of homes are now able to get gigabit capable broadband. This is up from 47% in 2021.

Full–fibre broadband reaches **11 million** UK households, up from 7 million a year ago

3.7 Affordability of telecoms services has always been a priority for Ofcom, and we recognise the current challenges faced by UK consumers at a time when many are experiencing growing financial pressures. More providers now offer cheaper 'social tariffs' for the most financially vulnerable and we will continue to focus on ensuring support for consumers through the take-up of these services. Competition will also play an important role in driving providers to continue to offer good deals.

3.8 During the coming year our key projects and programmes to support this priority outcome will include:

- **Implementing our Wholesale Fixed Telecoms Market Review:** We will continue to proactively monitor adherence to the rules we set out in 2021, taking action when needed to ensure that competition can play out on its merits. We will monitor competition and investment outcomes.
- **Mid-contract price rises:** We are examining whether inflation-linked, mid-contract price rises give phone and broadband customers sufficient certainty and clarity about what they can expect to pay. Our review will look specifically at the practice of in-contract price rises linked to inflation and percentage changes, which a number of providers introduced in 2021.
- **Cloud market study:** As part of our wider Digital Markets programme, we will be completing our market study into the supply of cloud computing services in the UK to understand whether the market is working well for businesses and consumers. The study will examine how the market is developing and the nature of competition, including whether any action is required.
- **Net neutrality:** The net neutrality framework has played a critical role in allowing people to access the content and services they want. Following on from our consultation in October 2022, we will finalise our analysis and guidance for broadband and mobile providers, to ensure the framework continues to support innovation, growth, and consumer choice.

- **Telecoms security regime:** We will work closely with telecoms providers to improve the security of their networks and services. Using our powers under the new telecoms security framework, we will monitor their ongoing implementation and compliance with their obligations and take enforcement action if providers do not comply with the new rules. We will 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 (known as TBEST).
- **Network resilience:** We will continue to promote better network resilience. We will consider how the duties applied to traditional telecoms networks apply to the virtualised networks which are being rapidly adopted, and support the Government's thinking on the future requirements for resilience of digital infrastructure. We are also undertaking a strategic exercise to assess the resilience of digital infrastructure, especially where it underpins communication services and other critical industries and applications.
- **Scams:** Cheap technology has enabled a significant and growing volume of scams received by phone calls and text messages, which disproportionately affect the most vulnerable. We will consult on introducing some changes to existing rules to strengthen number authentication and will consider the options for going further.
- **Review of online personal communications services:** Online personal communications services – including messaging services such as WhatsApp – are increasingly widely adopted and used by UK consumers and businesses. As part of our digital markets work, we are reviewing whether users of online personal communications services are appropriately protected from harm, as well as considering if there are any competition issues in these important communications markets.
- **Switching implementation:** We will continue to work with industry to ensure the One Touch Switch process is implemented quickly and successfully. One Touch Switch means consumers will only need to contact their new home broadband provider to switch and will also be able to switch quicker – in just one day where this is technically possible.

3.9   In addition to these areas of increased activity within the organisation our Plan of Work includes ongoing programmes supporting our work in this area.

- **Embedding our consumer protection rules and commitments (monitoring and enforcing compliance):** We will have a strong focus on ensuring successful embedding of, and compliance with, the consumer protection interventions we have put in place over the last few years, both through changes to our rules but also through the introduction of voluntary initiatives.
- **Affordability:** We will report on the extent to which households have difficulty paying for communications services, particularly in relation to broadband and it continues to be our view that communications providers have a moral responsibility to promote take-up of 'social tariffs'. We will also continue to monitor the availability, promotion and take-up of social tariffs and help raise awareness among eligible customers.
- **Protecting 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 monitoring how providers ensure customers in debt or struggling to pay are treated fairly. We also contribute to joint work with the UK Regulators Network to improve outcomes for vulnerable consumers.
- **Migrating from legacy services:** The managed transition away from legacy services such as traditional landline telephony and 2G/3G mobile is a key component to the business case for new network investment. We will work with industry to ensure that customers are supported and protected through the transition.
- **Data reporting:** We will continue to report on the availability and use of broadband and mobile networks. This will serve as a measure of the effectiveness of our pro-investment interventions in delivering improved availability of better networks and to monitor progress of Government funded schemes.
- **Mobile coverage:** We will continue working with industry to improve the accuracy and consistency of available coverage information; exploring how different sources of real-world data can provide consumers with more information about the mobile performance they can expect to receive where they will use it to enable them to make more informed choices about services and providers.
- **Broadband USO delivery:** We will continue to monitor the delivery of the broadband Universal Service Obligation (USO) by the designated providers, BT and KCOM.

Media we trust and value

A wide range of high quality media and protection for audiences across the UK

The UK's media sector continues to transform in response to fierce competition, evolving business models, new technologies, and ongoing changes in audience behaviour – especially among younger viewers and listeners. Our regulatory approach is also adapting to ensure that audiences remain at the heart of everything we do.

3.10   The broadcasting and media sectors are an important part of the UK's culture and economy. Audiences enjoy an extraordinary variety of content from a wide range of providers, both broadcast and online. Within this evolving landscape, our Public Service Broadcasters (PSBs) remain a cornerstone – with their focus on duly accurate, and duly impartial news, delivering high-quality programmes from across all nations and regions, and reflecting the diversity of UK audiences.

3.11   Audiences' growing use of online media services and the impact of digital disruption on media markets is an increasing focus of our regulatory work. The degree and pace of change means that there is significant work still to do to protect public service media for the next generation.

3.12   We will continue to protect audiences from potentially harmful content and safeguard freedom of expression by setting and enforcing broadcasting and on-demand standards. We undertake a range of work to maintain the benefits of public service media for all UK audiences and the wider creative economy. We also work to protect fair competition, place a spotlight on industry diversity and promote the plurality of TV and radio services available in the UK.

5h 16m Audiences across the UK spent an average of 5 hours 16 minutes watching TV and video content per person per day

BBC iPLAYER **itv HUB** **4**

Time spent watching services such as BBC iPlayer, ITV Hub and All 4 increased by an average of three minutes per person per day to 15 minutes in 2021, partially offsetting the declines for other forms of broadcast TV viewing

3.13   In undertaking our work to deliver 'media we trust and value', we seek to achieve the following outcomes for consumers:

- Audiences can watch and listen to public service content which is produced across the UK and reflects its diversity.
- People can trust what they watch and listen to – it is accurate, impartial and trusted.
- A plurality and choice of a wide range of providers and producers competing fairly for audiences.
- Audiences protected from harm and freedom of expression is safeguarded.

3.14   During the coming year, our key projects and programmes will include:

- **Future of Public Service Media (PSM) and** Media Bill: In our major Review, *Small Screen: Big Debate*, we recommended urgent reform to the legislative framework for public service media. The UK Government signalled its intention to legislate in its subsequent Broadcasting White Paper, *Up Next* in April 2022. We continue to work with DCMS to deliver necessary reform, including delivering PSM online prominence and availability. Pending legislative change, we will ensure the existing regulatory framework works as effectively as possible, including by ensuring all Public Service Broadcasters (PSBs) contribute to the PSB remit; and taking an in-depth look at how the market is serving the interests of children. We will also progress commercial PSB licence renewals and review relevant codes and guidance as appropriate.
- **Monitoring BBC performance and market impact:** We will continue to hold the BBC to account for its performance across all its duties, including:

1. Focusing on how the BBC adapts the BBC First complaints process to ensure it is transparent and works well for audiences. We have directed the BBC to improve its transparency in relation to complaints about due impartiality and due accuracy. The BBC must now publish its final reasoning in all these cases.

2. Monitoring the implementation of the Serota Review findings (and Impartiality and Editorial Standards Action Plan) and how the BBC is working to improve public confidence in its approach to due impartiality.

3. Holding the BBC to account for how it delivers its Mission and Public Purposes under the new BBC Operating Licence.

4. Continuing to review the impact of the BBC's public service and commercial activities on the market, to ensure it does not have an undue impact on competition.

- **Safeguarding trust in news:** In November 2022, we published our view on the role online intermediaries play in the consumption of news content and how this affects people's news consumption. Over the coming year, we will build on this work by consulting on proposals to safeguard media plurality, ahead of bringing forward any recommendations to the UK Government by 2024. We are conducting research into the needs of local audiences, including in relation to local news, to inform future work. We will also continue to enforce the due impartiality and due accuracy requirements across all the broadcasters we regulate.

- **Upholding video-on-demand (VOD) standards:** As the content regulator for UK-established VOD services, we will be working over the next year to ensure providers are complying with statutory requirements around harmful content. We will also work closely with DCMS in supporting proposals to more closely align the standards that apply to VOD services to those that apply to broadcast content, as outlined in the Government's White Paper. We have commissioned new research into audience expectations that will focus on people's attitudes towards on-demand viewing.
- **Connected TVs and smart speakers:** Content intermediaries, such as connected TVs, smart speakers and voice assistants, are increasingly important gateways to content for many people. As part of Ofcom's Digital Markets programme, we will examine issues relating to their role in UK media markets.
- **Equity, diversity and inclusion (EDI):** Our work will continue to evolve over the next year after the recent launch of our EDI toolkit, including a new maturity model, quantitative questionnaire and updated guidance for industry. Using these new methods, we will publish our annual diversity data report detailing the makeup of workforces within the UK's broadcasting industry. We are also exploring more targeted work, for example a collaborative piece of work around exit surveys, in our ongoing focus on retention of talent within the sector.

3.15   While online services grow in importance for many households, broadcast TV and radio services are still widely used and highly valued. Three quarters of people still watch live TV and about nine in ten adults listen to live radio each week. Our Plan of Work therefore includes a range of work to continue to protect and promote a choice of high-quality programmes for all audiences across the UK and over both broadcast and on-demand services.

- **Protecting broadcast audiences from harm:** We will continue to set and enforce content standards in our work as the post-transmission regulator of broadcast TV and radio. We will take robust enforcement action against broadcasters that breach our rules, prioritising the enforcement of rules relating to potential harm to the audience. This includes the broadcast of content likely to incite crime, uncontextualised hate speech, ensuring audiences are adequately protected against a range of other potentially harmful material, and upholding due impartiality and due accuracy. We will place particular focus on ensuring that children are protected from broadcast content that is unsuitable for them and will be undertaking new research on violent and sexual material, to be published in 2023.

- **Using data and innovation in complaints-handling:** We will continue to develop and test the use of data-driven tools to enhance the way we assess complaints. We will explore the use of innovative technology to improve the efficiency of our complaints handling systems.

- **Advertising regulation:** We expect to confirm in the first part of 2023 any next steps in our review of the Code on the Scheduling of Television Advertising (COSTA) rules. We will also continue preparations 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. Finally, we will continue our work with DCMS on its Online Advertising Programme, to ensure that advertising regulation across different media remains coherent and effective.

- **Accessibility of TV and on-demand services:** We will continue to enforce requirements for broadcast access services – subtitles, audio description and signing – as well as working with the UK Government to introduce new accessibility requirements. We are reviewing our 'best practice' guidelines on providing high-quality access services. We will also monitor and publish information on the accessibility of broadcast and on-demand programme services to people with sight and/or hearing impairments.

- **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 analogue radio services. We will continue to respond to stakeholder requests to make changes to those licences where appropriate.

- **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 also continue our work on the delivery of TV and audio content over IP.

We live a safer life online

Platforms are incentivised to reduce harms and make consumers safer

Online services are increasingly central to our lives, bringing huge opportunities in terms of the free flow of information, educational and commercial opportunities, and the ability for self-expression and building global communities. However, they also present challenges, especially in terms of the potential to spread harmful content or facilitate harmful behaviour.

3.16   We want everyone in the UK to be able to lead a safer life online – we will use our existing powers to ensure video-sharing platforms (VSPs) established in the UK protect their users and we will continue our work to improve media literacy through our 'Making Sense of Media' programme. We are also preparing for our new duties as the UK's online safety regulator and this year we expect to begin the implementation of these new powers to improve online safety.

3.17   Through the Online Safety Bill, the UK Government is putting in place a new regulatory regime for online safety, which will be overseen by Ofcom. The Bill will require services which host user-generated content and search engines to assess risks to their users and to have proportionate systems and processes for protecting individuals from illegal harms online, particularly children. It will also require pornography providers to ensure children are not able to encounter pornographic content.

62% of UK internet users have experienced at least one instance of potential harmful behaviour or content online in the last four weeks

Save post

Report post
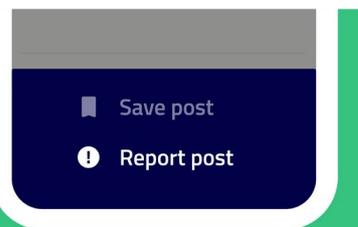
A third of children aged 8–15 who go online have seen worrying or upsetting content online in the past 12 months.

3.18   While the focus of the Bill is online safety, while we take on our new duties we will ensure that our approach upholds the importance of freedom of expression online.

3.19   To achieve lasting change we will need to ensure that user safety is embedded at the heart of online services' decision-making. We will also use our transparency reporting powers to shine a light on how effective platforms' systems and processes are in protecting their users, and to incentivise further improvements.

3.20   We are already regulating VSPs established in the UK, such as TikTok, Snapchat and Twitch, and the experience from this regime will help to inform our online safety work.

3.21   In undertaking our work in this area, we will seek to achieve the following outcomes:

- Ofcom is established as a credible and trusted online safety regulator.
- Expected actions are set out to identify and address priority harms online.
- Online companies understand what they need to do to put online safety at the heart of how they operate, while also safeguarding freedom of expression.
- Users have a clear understanding of what they can do to be safer online.

3.22   During the coming year our key programmes of work to support this priority will include:

Video-sharing platforms

3.23   In October 2022 we published our first annual report covering Ofcom's regulation of VSPs established in the UK. We reported the steps these platforms had taken to comply with the new regime. We also set out our priorities for the second year, in particular how platforms set, enforce, and test their approach to user safety. We will focus on:

- Ensuring VSPs have sufficient processes in place for setting and revising comprehensive terms and conditions (generally known as Community Guidelines) that cover all relevant harms.
- Checking that VSPs apply and enforce their Community Guidelines consistently and effectively to ensure harmful content is tackled in practice.
- Reviewing the tools VSPs provide to allow users to control their experience and promoting greater engagement with these measures.
- Driving the implementation of robust age assurance to protect children from the most harmful online content, including pornography.

Online safety

- **Implementing the online safety regime once the Online Safety Bill becomes law:** We are preparing to implement the regime as swiftly as possible once our statutory powers come into force. We will begin the process of consulting on the regulatory architecture, including the Codes of Practice and guidance relating to elements of the regime concerning illegal content (including some of the most serious harms to children such as online Child Sexual Exploitation and Abuse) and the protection of children from legal but harmful content. The precise timing of these consultations will depend on when the Online Safety Bill becomes law. We will provide further information when we have more clarity about parliamentary timelines.
- **Engaging with online services within scope of the new regime:** We will identify an initial set of high-risk or high-impact services that we wish to engage with. We will look to set clear expectations of the nature of our engagement with these services, to understand their assessment and mitigation of risks faced by users of their services, including through the use of our information gathering powers. We will also continue to develop relationships with, and build our understanding of, the diverse range of services covered by the online safety regime. In addition, we will look to develop tools to promote compliance with the online safety regime.
- **Developing our operational effectiveness:** The new online safety regime represents a significant expansion of Ofcom's duties. Via our ongoing research and analysis, we will continue to build the evidence base around online harms and options for addressing them. We will also continue to cooperate with UK regulators, in particular in areas where there may be interactions or trade-offs between our objectives with the Digital Regulation Cooperation Forum (DRCF) being a key forum for collaboration. We will work with overseas regulators and policymakers implementing, or considering, similar regimes, including through the newly launched Global Online Safety Regulators Network. This will drive alignment and reduce regulatory burdens where possible and improve the effectiveness and efficiency of regulation.

Making Sense of Media

3.24   Making Sense of Media is our main programme in the area of online media literacy. In addition to our extensive research publications, our focus is on finding out how to enhance media literacy provision for underserved communities and working with platforms to co-create best practice principles for media literacy by design. This is underpinned by our focus on engaging the sector, academics, funders and platforms to share research, expertise, evaluation tools and what works.

3.25   We will be progressing work across our five 'spokes', as set out in our approach document published in 2021. This includes:

> - Engaging with the media literacy sector through online and in-person events, our Advisory Panel and expert working groups.
> - Establishing best-practice principles for on-platform interventions to encourage media literacy by design.
> - Commissioning a range of media literacy pilot interventions for underserved groups across the UK.
> - Publishing a digital toolkit to promote a common approach to the evaluation of media literacy initiatives.
> - Continuing to grow our evidence base to inform our work and that of the media literacy sector.

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Enabling wireless services in the wider economy

Ensuring efficient use of spectrum and supporting growth across the economy

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Wireless communication is playing an increasingly significant role across many sectors of the economy, delivering our news, connecting us to friends and family, automating factories, supporting public services and monitoring the natural environment. Technological developments are enabling new and innovative applications and business models, meaning more people and organisations are making use of wireless technology.

3.26   Radio spectrum supports a wide variety of wireless applications and technologies, with rapidly increasing demand from both existing and emerging new users. It is, however, a finite resource that we manage for the benefit of everyone in the UK. Our aim is to drive efficiency and support innovation, ensuring this invisible and essential resource is used effectively.

We carry out extensive measurement campaigns to validate mobile coverage; last year alone we measured coverage data over 15,000 miles of UK roads and collected around 2 billion data points

3.27   Spectrum is the vital element underpinning a broad range of wireless services and technologies that feature in our everyday lives and support businesses and public services. These include mobile, Wi-Fi, wireless connections (like Bluetooth), broadcast radio and television services, and satellite navigation. Spectrum is also critical to support the emergency services, air traffic control and radar, and our armed forces. We want to enable existing services to innovate and grow as well as meeting the spectrum needs of new applications.

3.28   In the face of this growing and, in many cases, competing demand for spectrum, Ofcom set out a Spectrum Management Strategy in July 2021, which outlines how we will deliver our vision for spectrum management. In November 2022 we published our Spectrum Roadmap focusing on what we will be doing to deliver against this vision. While the outcomes we seek in this priority are not necessarily consumer-facing, the services we enable are used by most people every day.

3.29   In undertaking our work to 'enable wireless services in the wider economy' we seek to achieve the following outcomes:

- "Keeping the lights on" through our business-as-usual duties (licensing, planning, assurance and compliance).
- Spectrum is available to enable the communications industry to meet anticipated growth and innovation in consumer mobile and wireless services.
- Spectrum is available to meet the specialised needs of key sectors (like utilities, manufacturing and transport).
- Accommodate more users through sustained improvements in efficiency of spectrum use.
- UK interests represented effectively in international negotiations on spectrum allocation and use.

3.30   In line with our Spectrum Management Strategy and roadmap, our programme of work will include:

- **Monitoring and supporting network evolution and convergence:** We will continue our work to enable access to spectrum to support competition, innovation and growth across different sectors, and we will review the implications on spectrum of future network evolution and convergence. There are a number of technology developments that we expect will bring increased spectrum efficiency, improved functionality and enable different deployment models. We can expect these new developments to be incorporated in future networks such as 6G and next-generation Wi-Fi and satellite.
- **Accelerating innovation and spectrum sharing:** We will continue to engage with existing and new users of spectrum to understand their evolving needs and ensure our authorisation approaches are fit for purpose. We have issued over 1,000 shared access licences and will be reviewing our framework to see what is working well and whether we need to adjust our approach in the light of experience and growing interest from a wider range of spectrum users. We will start work to create the conditions to facilitate industry and academia developing new technologies to enable greater spectrum sharing using 'spectrum sandboxes'.
- **Improving the gathering and analysis of data for spectrum management purposes:** Use of real-world data for our propagation and coexistence modelling, a better understanding of active antennas, and greater insight on band utilisation are all areas of increased focus identified in our spectrum roadmap; they are critical in improving our understanding of how spectrum is used and informing our future policies in the light of growing demand. Our proposed approach to allowing users to log interference events using an API should help to improve our ability to identify, resolve and even pre-emptively manage interference issues.

3.31   These areas of increased activity are complemented by an ongoing programme of work which contributes significantly to optimising spectrum use across the UK. This includes:

- **Increased international leadership on spectrum management:** Working with Government, we will continue to represent UK interests effectively in international negotiations and agreements on spectrum allocation and use for all spectrum users. We will lead the UK delegation to the World Radio Conference in 2023 (WRC-23) which will take decisions on a range of key spectrum issues which have the potential to significantly influence how spectrum is used in the UK. This includes: future use of the upper 6GHz band to support wireless broadband growth, future spectrum for DTT services, and the future use of the UHF band as well as considering longer-term items for discussion at WRC-27. We will also seek to influence the evolution of rules for managing Non-Geostationary Orbit satellite interference and more broadly the development of the international frameworks for managing spectrum and use of the orbital resource.

- **Supporting spectrum users:** We manage around 400,000 live spectrum licences and we will continue to give advice and assistance to these spectrum users alongside work to provide more licensing services online. We will further support these users by investigating harmful interference and unlicensed or illegal spectrum use and reduce the risk of interference occurring by limiting the availability of non-compliant equipment on the market.

- **Planning of spectrum frequencies:** We will be engaging in the technical planning of frequencies for licensees that use the same spectrum in different areas of the UK, including for radio and TV broadcasting. We will be providing spectrum planning and assurance to spectrum users at important UK events, such as Eurovision 2023 and the Coronation of His Majesty King Charles III.

- **Monitoring and measuring emissions:** We will make sure emissions from radio equipment are within internationally agreed levels for the protection of the general public. We will also measure emissions from mobile phone and other communications masts, checking licensees are complying with emission limits and providing information and advice where needed.

Regulating postal services

3.32   To ensure that everyone can continue to rely on postal services across the country we will be continuing our regulation of postal services. We want to make sure that people and business can access communication services and that nobody is left behind as services evolve.

3.33   The postal market has undergone significant change in recent years as demand shifts from letters to parcels. Postal services are used by almost everyone in the UK on a regular basis, from online shopping deliveries, to receiving important medical correspondence, to sending cards to friends and relatives. Our regulatory framework underpins the postal market, and so it is important that our approach to regulation remains relevant, effective, and fit for purpose. This includes reviewing whether regulation of the sector needs to change in the light of market developments and evolving user needs.

3.34   We will continue to monitor the postal sector as part of our statutory duty to secure a universal postal service, which requires the delivery of letters and parcels to every address in the UK at uniform and affordable prices and to a high level of quality of service. As part of this, we will be assessing Royal Mail's performance during 2022/23 and deciding whether to open an investigation. That process will also take account of the Seventh Report of the House of Commons Business, Energy and Industrial Strategy Select Committee's 2022-23 session which sets out concerns that Royal Mail has failed to deliver against parts of the Universal Service Obligation (USO).

3.35   During 2023–24 our monitoring programme will be enhanced, to reflect the conclusions of our review of the future regulatory framework for post which includes new guidance and obligations in the parcels market for the handling of complaints. This enhanced monitoring will also cover Royal Mail's efficiency progress and the longer-term sustainability of the postal USO given that, as noted in our latest annual monitoring report, the uncertainties and risks around that sustainability have recently increased.

3.36   Royal Mail has announced recently that it has approached the Government seeking reform of the minimum requirements of the postal USO. This is a matter for the Government, but we stand ready to engage in any further consideration of the future of the USO.

3.37   Safeguard caps help to ensure USO services continue to be affordable. The current safeguard cap of Royal Mail's Second-Class stamp prices ends in March 2024. We will review the appropriate scope and level of the safeguard caps that will apply from April 2024.

4. Nations

4.1   Communications services should meet the needs of people and businesses, regardless of geographical location. There are unique aspects to the way communications services are provided and received in Scotland, Wales and Northern Ireland and some English regions. Our teams in Edinburgh, Cardiff and Belfast ensure that we understand and address the specific circumstances of consumers and stakeholders in each of the nations. Our statutory National Advisory Committees advise us about the interests and concerns, in relation to communications matters, of people living in England, Scotland, Wales and Northern Ireland and are an important part of our policy formulation process.

4.2   Memoranda of Understanding (MoU) in each nation ensure that the views and interests of stakeholders, consumers and audiences in Scotland, Northern Ireland and Wales are represented at Board level within Ofcom. We will continue to engage constructively with the signatories of each MoU, including the relevant governments and parliaments, in delivering on our priorities for 2023–24.

4.3   The views of audiences across the UK are also presented to Ofcom's Content Board, which has experienced members representing each of the 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. Affordability will remain a key priority for us as we support work to increase awareness and take-up of broadband social tariffs, recognising that financial pressures will be felt differently in different areas of the country.

4.4   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. An outline of key areas of work and priorities for each of our nations is presented below.

Scotland

4.5   In delivering our Plan of Work priorities for 2023–24, we continue to recognise there are particular challenges and specific needs across Scotland in Ofcom's regulated sectors. For instance, Scotland's geography presents unique challenges in providing effective and reliable communications services to our most rural and remote towns and villages. Audiences also have specific needs and expect Scotland's culture and diversity to be reflected in local and national broadcast services. Ofcom in Scotland will continue to engage across the entirety of the country to reflect this.

4.6   We will undertake work to ensure that communications networks are secure and resilient, including across Scotland's islands where major outages can have a significant impact on local communities. We will also continue to provide technical and regulatory advice, as well as relevant data (where appropriate), to help inform the Scottish Government's

delivery of key telecommunications infrastructure projects (such as the Reaching 100% and Scottish 4G Infill Programmes) and ensure smooth interaction with other publicly funded schemes.

4.7   We will develop new partnerships (and build on existing ones) with industry, academia and public sector organisations in Scotland that deliver innovative applications and business solutions, particularly for wireless services. As part of this, we will promote the work of our Data and Innovation Hub to key stakeholders in Scotland, exploring opportunities to collaborate with the likes of the Scotland 5G Centre, the Scottish AI Alliance, Scotland IS, Data Lab and CivTech. We will also work with the new Consumer Scotland body to achieve shared goals.

4.8   We know how important our broadcasting and independent production sectors are to Scotland's culture and economy. Throughout 2023–24 we will continue to engage on public service media regulatory issues with a range of organisations including STV, BBC Scotland, Channel 4 in Scotland and Screen Scotland. Ofcom also has statutory duties to make appointments to the Board of MG ALBA, and we will continue to work closely with the Scottish Government on recruitment to the Board over the course of the year as required.

4.9   Our goal is for everyone in Scotland and the UK to be able to lead a safer life online. We will therefore continue our engagement with governments and relevant agencies to ensure the smooth implementation of the proposed online safety regime in a devolved context. We will also step up our engagement with the tech and gaming sectors in Scotland to ensure they are fully engaged with the development of the new online safety framework.

Northern Ireland

4.10   As part of our MoU with the Northern Ireland Government – which saw the appointment of Ofcom's first Board Member for Northern Ireland in 2022 – we will continue working with Departments to provide regulatory support and technical advice on key issues like full-fibre rollout, telecoms security and resilience, migration from legacy services, mobile connectivity and cost-of-living pressures. This will include being part of a barrier-busting taskforce as part of the Government's Mobile Action Plan, which seeks to remove barriers to improved 4G and 5G connectivity.

4.11   Acknowledging changes to the broadcasting landscape both locally and across the UK, we will engage with local stakeholders to make sure they maintain a clear understanding of the importance of local content and audiences, as well as highlighting regulatory requirements that ensure the production and prominence of content that means Northern Ireland audiences are well served.

4.12   We will seek to strengthen and deepen local stakeholder relationships in online safety as the Bill progresses and the regulatory regime develops. We will work with officials in Government Departments, the local tech sector, safeguarding groups, and consumer advocacy groups to improve understanding of the regulatory regime as it takes shape, and to ensure that Northern Ireland issues are given due consideration as we support the passage of the Online Safety Bill in the UK Parliament.

4.13   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.

Wales

4.14   Nurturing good working relationships with our stakeholders is at the heart of Ofcom's work in Wales. We will continue our collaborative and creative approach to engaging with all our stakeholders – the Welsh Government, Members of the Senedd, the Office of the Secretary of State for Wales, Members of Parliament, the Welsh Language Commissioner, industry and partners on all matters of relevance in a timely manner. This will allow Ofcom to understand diverse perspectives and further enrich its decisions about the interests of consumers in Wales.

4.15   Cymraeg 2050 is the Welsh Government's long-term strategy for creating a bilingual Wales. Ofcom is fully committed to playing its part in helping to reach a million Welsh speakers by 2050 by ensuring that consumers in Wales can engage with Ofcom in Welsh at ease. Ofcom has been implementing the Welsh Language Standards as set out in its compliance notice since January 2017. We will conduct a review of our processes and compliance with the standards so as to ensure successful outcomes.

4.16   We will continue to work with broadcasters in Wales to help ensure that audiences in Wales are well served on both television and radio in Welsh as well as in English.

4.17   We will continue to contribute to the Shared Rural Network (SRN) working group in Wales and monitor progress of the implementation of the SRN, ensuring that expected benefits are delivered to rural communities. In the hardest to reach areas, we will collaborate to raise awareness of alternative technologies that may offer workable solutions for some communities.

England

4.18   We will continue to address the diverse communications needs of people in all parts of England. The statutory Advisory Committee for England will continue to identify issues affecting the communications and postal sectors in England and advise Ofcom on these matters.

4.19   We will continue to engage with Government, local MPs and local authorities to support the pace of full-fibre rollout and greater mobile coverage as well as ensuring the reliability and resilience of networks. Our annual Connected Nations report will highlight the discrepancies in access to good, reliable fixed broadband and mobile coverage between different parts of the country.

4.20   We are committed to supporting the UK's vibrant media ecology by highlighting the different consumption habits and media experiences of English audiences. The latest Media Nations report reveals the coverage of local DAB services increased in 2021

following the launch of new multiplexes in North-West England. Ensuring we push for greater diversity and inclusion across the media sector, especially in public service media, remains an essential part of our work so that audiences consume content that accurately reflects the experiences of audiences across England.

5. How we deliver

5.1   This section outlines how we will deliver on our commitments set out above through our approach to partnership and collaboration, our underpinning work, investing in our organisational capability and making best use of our resources.

Partnerships

5.2   We recognise that much of what we seek to achieve for consumers and our sectors cannot be done by Ofcom alone and we increasingly rely on a range of important partnerships in the UK and internationally.

Domestic partnerships

- **Continuing to work with fellow digital regulators through the Digital Regulation Cooperation Forum (DRCF)**. The DRCF brings together the major UK regulators tasked with regulating digital services – the CMA, the FCA, the ICO and Ofcom – to collectively drive regulatory cooperation and deliver coherent approaches to digital regulation. The DRCF published its second workplan in April 2022, including projects to help tackle some of our biggest digital challenges, from protecting the safety and privacy of children online to working on collective approaches to regulating the use of algorithms, horizon scanning and enabling innovation. The DRCF Chief Executive will work with the Chief Executives of the DRCF members to oversee the delivery of the DRCF's third annual workplan, due to be published in spring 2023.
- **UK Regulators Network (UKRN)**. We work with other UK regulators[3] 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 work with the UKRN to improve outcomes for vulnerable consumers.
- **Making Sense of Media Network and Advisory Panel**. Our Making Sense of Media Network currently has 460 members representing a variety of organisations in the UK and internationally, collaborating to improve media literacy in the UK. Our Advisory Panel informs Ofcom's work to help improve the online skills, knowledge and understanding of UK adults and children. The Panel provides insight from stakeholders to support and challenge our thinking.
- **Law enforcement and the 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.

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[3] Civil Aviation Authority; Financial Conduct Authority; Financial Reporting Council; Information Commissioner's Office; Northern Ireland Authority for Utility Regulation; Office of Gas & Electricity Markets; Office of Rail & Road; Payment Systems Regulator; Pensions Regulator; Regulatory of Social Housing; Single Source Regulations Office; Water Services Regulation Authority.

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

International partnerships

5.3   We will continue to invest in our international engagement programme across the sectors we regulate. The impact of the digital transformation of our sectors makes our international work even more important to delivering on our objectives. The regulatory issues we face are common across the world and we are engaging with a global set of stakeholders. Our work in this area includes:

- Collaboration with regulatory counterparts, governments, academic experts and civil society, including through multi-stakeholder engagement. We will continue to deepen our existing international relationships and explore new ones, exchanging experiences and best practices across all our regulated sectors and their wider context. In particular, we will advocate for shared norms and the compatibility of regulatory regimes in the emerging area of online safety. We are founder-members of the Global Online Safety Regulators' Network which we will use to drive forward this agenda. We will also continue to work closely with our European counterparts on the implementation of rules for VSPs and other platforms.
- Driving outcomes for the UK through the International Telecommunications Union (ITU). We represent the UK at the ITU, where the UK is a newly elected member of the governing Council, for 2023-2026. Our strategic objectives at the ITU are to secure good outcomes for the UK in the work of its three sectors:
  - Supporting rules for radiocommunications;
  - Aligning global telecoms standards; and
  - Bringing Ofcom's experience to support developing countries.

Growing skills and capabilities

5.4   In addition to our policy and underpinning work above, our professional functions support our projects in delivering professional excellence. This includes activity across the disciplines of technology, data, economics, legal, enforcement, strategy and research.

5.5   To ensure that we remain effective in delivering our priorities, these functions are evolving, and we will grow their capability, particularly in the light of our new duties:

- **Growing our online safety capability:** With our new responsibilities for creating a safer life online we have already taken significant steps to build our skills and expertise, including through recruitment of new colleagues from across the technology sector and civil society organisations. In the coming year we will continue to expand this capability, including through establishing a new Online Safety Group within Ofcom.
- **Expanding our technology function:** Recognising the role technology has in shaping demand, in driving consumer trends and in delivering services to consumers and businesses, we are strengthening our subject matter expertise across a range of

technologies and adopting a 'tech first' approach to policy development across the full breadth of Ofcom's regulatory remit.

- **Data and digital:** We are growing our data capability and adopting the latest techniques for collecting, processing and analysing information and utilising advanced analytical techniques to extract insight from complex data sets.
- **Expanding our commercial understanding:** We continue to strengthen Ofcom's understanding of the commercial priorities, incentives and business models of the stakeholders we regulate.
- **Horizon scanning:** Future-proofing our work by investing in our capability to look beyond our immediate, short-term priorities to understand how factors such as the market, technology and consumer behaviours may evolve.
- **Legal and Enforcement:** Developing our legal and enforcement capability and capacity to manage our expanding remit.

5.6   In the second quarter of 2023–24, we will publish an annual report summarising the progress we are making towards delivering the Ofcom Diversity & Inclusion Strategy for 2021-2026. The progress report includes information on the diversity profile of colleagues at Ofcom overall, and information on areas such as pay, recruitment, performance and promotions. The report helps us to determine our areas of focus for workplace inclusion for the coming year.

Underpinning wider work across the sectors we regulate

5.7   Our professional groups deliver underpinning work, in collaboration with other parts of the organisation, to support our policy work. Some of these important activities and specific programmes are outlined below.

- **Market research and intelligence:** All of 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, avatar-based research and crowd-sourced data, 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, 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. 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.

- **Economic discussion 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. Our research will continue to cover topics related to our objectives, such as [Data, Digital Markets and Refusal to Supply](#) and [Mobile spectrum licence duration and mobile network operators' investment decisions](#).

- **Understanding 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 be revising and publishing our impact assessment guidelines and we will ensure that our approach to policy appraisal follows best practice.

- **Technology innovation:** We want to foster an environment where innovation flourishes, both within Ofcom and in the sectors we regulate. To achieve this, we will develop a deeper understanding of how technology is driving change across our sectors and the potential impact on how we work. For example, we will undertake research into cross-cutting technologies like machine learning and explore how the increasing use of cloud services may change how telecoms and media companies deliver their services, feeding into our Cloud Market Study. Looking externally, we will also explore how we can facilitate greater innovation in the markets we regulate.

- **Data engineering and analytics:** The Data Innovation Hub provides central leadership and advice across Ofcom on how data and advanced analytics can be used to generate insights for our decision making in an effective, efficient and safe way. As the organisational data requirements become more complex, we will ensure there are the correct tools, analytical skills and capabilities available for people to create insights from data.

- **Technology policy:** Our new Tech Policy team bridges the gap between policy and technology teams, by leading on cross-cutting issues that have an impact across the organisation. This work will support the organisation's response to wider policy developments that will have an impact across our sectors e.g. digital identity and regulation of AI.

- **The Information Registry:** The Information Registry has a role in coordinating formal and informal information requests and working with stakeholders on the timing of our planned requests and feedback on information gathering. The team 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.

- **Sustainability and climate change:** Environmental sustainability is an increasingly important driver of commercial decisions for many communications companies. It is encouraging to see many of our regulated firms committing to net-zero plans to reduce their own environmental impact, while delivering services and networks that can help enable the UK to decarbonise and become more efficient. We will continue to consider factors relevant to sustainability and climate change in undertaking our work on future technologies, including to help us understand the role that such technologies can play in reducing the impacts of climate change.

Achieving value for money

5.8   As part of our wider efforts to ensure Ofcom is efficient and fit for the future, we will continue to deliver efficiencies across the organisation. We will look for opportunities to streamline and automate activities, building on our work to upgrade the spectrum licensing process. We intend to make more efficient use of our estate and intend to reduce our premises in London by 20%, through growth in our regions – supporting our out of London ambition – and developing a connected working framework allowing for more effective use of our space.

5.9   Where resources are limited, we will make choices guided by our priorities and statutory duties. 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.

5.10   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. Since 2015, Ofcom's base cap for its duties at that time has remained the same (with the exception of a one-off increase for inflation in 2020/21), leading to a reduction in the cost of regulation in real terms.

Spending cap for 2023–24

5.11   The UK Government agrees a spending cap for Ofcom's budget. We have agreed a spending cap of £131.9m with DCMS and HM Treasury, which has remained the same since 2021/22 and relates to the duties we had at that time. This has resulted in a real terms saving of 11%. Since then, Ofcom has agreed to take on new duties in online safety, telecoms security and restricting advertising of products high in fat, sugar and salt – this has added £55.1m to our spending cap, resulting in a total spending cap of £187m. 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. The charges due from each sector are listed in our tariff tables, published alongside this statement. The workplan is reflected in the tariffs we set, and there is no change to the methodology we have used to calculate these charges.

A1. What we do

A1.1   Ofcom's mission is to make communications work for everyone. We regulate fixed-line and mobile telecoms, TV and radio broadcasting, video-on-demand services, post, and the radio spectrum 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. Ofcom regulates video-sharing platforms established in the UK and we are set to take on additional responsibilities as the UK's online safety regulatory under the Online Safety Bill. 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. The Online Safety Bill will, among other things, introduce a new duty for Ofcom to secure in the exercise of our functions the adequate protection of citizens from harm presented by content on regulated services, through the appropriate use by providers of such services of systems and processes designed to reduce the risk of such harm.

A1.6 On 1 October 2022, the new regulatory regime established by Telecommunications (Security) Act 2021 formally commenced. 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 2023–24

Project detail	Milestones
Network security and resilience. We will carry out our compliance monitoring and enforcement role under the new telecoms security framework. We will 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 (UKTL) when it is launched) will work to enable newer vendors' ability to test technology in a commercially neutral environment through the SONIC (SmartRAN Open Network Interoperability Centre) Labs open radio access network testbed. We 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 and member of UKTL Oversight Board.	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. Following our consultation, we will be looking to finalise our analysis and guidance, to ensure the framework continues to support innovation and consumer choice.	Publication Q3 2023–24
Cloud market study. We will complete our market study into the supply of cloud computing services in the UK to understand whether the market is working well for businesses and consumers. The study will examine how the market is developing and the nature of competition, including whether any action is required.	Consultation Q1 2023–24 Statement Q3 2023–24
Review of online personal communication services. As part of our digital markets work, we are reviewing whether users of online personal communications services are appropriately protected from harm, as well as considering if there are any competition issues in these important communications markets for UK consumers and businesses.	Call for input Q2 2023–24

Mobile markets. We will build on our consultation 'Ofcom's future approach to mobile markets', to better understand the impact of technological and market developments on how the market functions, and to monitor consumer outcomes in terms of pricing and quality and changes to how services are being delivered. This will include analysis of customer level data that we gathered as part of this work to date, which we intend to publish in a discussion paper, and a refresh of that data.	Ongoing
Openreach Monitoring Unit (OMU). The OMU will continue to monitor BT and Openreach's compliance with BT commitments, as well as being alive to any obstacles that could impact the outcomes set out in the wholesale fixed telecoms market review (WFTMR). It remains vital that Openreach and BT continue to operate in a way that is strategically independent from each other and that the development of competition in gigabit-capable networks is protected in line with the strategy set out in the WFTMR. We continue to encourage stakeholders to contact us with any concerns.	Report Q1 2023–24
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 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
2G and 3G switch off. We will continue to work with mobile providers to help ensure customers, particularly vulnerable groups, receive the support they need and can continue to access their services as the 3G and 2G networks are gradually switched off.	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.	Ongoing
Phone-paid Services Authority (PSA). We will continue the process of transferring responsibility for regulating phone-paid services from the Phone-paid Services Authority (PSA) to Ofcom. We will consult on a draft statutory order under Section 122 of the Communications Act 2003.	Consultation Q1 2023–24
Broadband universal service. We will continue to monitor the delivery of the broadband Universal Service Obligation (USO) by the designated providers (BT and KCOM).	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, broadband provider, package, geography and time of day.	Report Q1 2023–24

Implementation of One Touch Switch. Following our decision to introduce One Touch Switch (OTS) for residential landline and broadband switches, we are working with industry to ensure OTS is implemented as quickly as possible.	Ongoing
Affordability of communication services. We will monitor and report on the extent to which households have difficulty paying for communications services, particularly in relation to broadband. We will also monitor the availability, promotion and take-up of social tariffs and help raise awareness among eligible customers.	Report Q1 2023–24
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 monitoring how providers ensure customers in debt or struggling to pay are treated fairly. We also contribute to joint work with the UK Regulators Network to improve outcomes for vulnerable consumers.	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. We will also help consumers avoid scams by raising awareness and improving information, so people can more easily spot and respond to scams.	Consultation Q1 2023–24
Consumer protection monitoring and compliance. We will continue our focus on promoting effective compliance with consumer protection requirements, including considering the appropriate time to carry out a further review of the impact of end of contract notifications (ECN) and annual best tariff notifications (ABTN). We continue to monitor and understand the impact of both these and voluntary schemes.	Ongoing
Roaming customer protections. We will continue our work on customers' experiences of mobile roaming and inadvertent roaming. We will consider whether any measures may be required to protect the interests of customers.	Consultation Q2 2023–24
Mid-contract price rises. This review will look specifically at the practice of in-contract price rises linked to inflation and percentage changes, which a number of providers introduced in 2021. We will consider whether we need to intervene to ensure customers have greater certainty and clarity, from the outset, about the prices they will pay over the duration of their contract.	Publication Q3 2023–24

Improving consumer experience and 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. We continue to work with industry to improve coverage information and are exploring how different sources of data can provide consumers with more information about the mobile performance they can expect to receive.	Report Q2 2023–24
Comparing customer service. We will publish our annual report looking at the quality of service provided to residential customers by fixed and mobile telecoms providers.	Report Q1 2023–24
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 2023–24
Improving broadband information for customers. We are continuing our work to improve customer understanding of the broadband market and to empower people to make informed decisions about their broadband purchases. We have published proposals to improve consumer information about the underlying technology used to deliver their broadband service, with the aim of issuing a statement later in the year.	Statement Q3 2023–24
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
BBC audiences review. We have launched a review to examine why specific audience groups, including those from lower socio-economic groups, are persistently less satisfied with the BBC and seek to better understand their habits, and how the BBC is delivering for them. Our findings will inform our next annual assessment of the BBC's performance.	Report Q3 2023–24
Monitoring the BBC's 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 those 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. Following our review of and Statement on Modernising the BBC's Operating Licence, we will be developing new metrics for assessing the BBC's performance and will monitor how the BBC responds to the new reporting requirements.	Report Q3 2023–24
Future of BBC regulation. We have published our review of how Ofcom regulates the BBC and identified changes necessary to ensure regulation remains fit for purpose in holding the BBC to account on behalf of audiences. This review and broader evidence will feed into the DCMS' Mid-Term Review of the BBC's governance and regulation, due to be completed by the end of 2024.	Ongoing
Channel 3 and Channel 5 relicensing. We will continue work to relicense the Channel 3 and 5 PSB services. We await a decision by the Secretary of State for DCMS in response to our Section 229 report and any decision to use order making powers. The existing Channel 3 and Channel 5 licence holders must apply for renewal by 30 April 2023. Subject to that, we would expect to finalise new licences by the end of 2023–24.	Statement Q4 2023–24
Channel 4 relicensing. Following the Government's announcement that Channel 4 Corporation (C4C) will remain in public ownership, we will undertake the statutory process of relicensing C4C for the provision of the Channel 4 service for the period post-2024.	Consultation Q3 2023–24 Statement Q4 2023–24
Responding to Channel 4 Corporation (C4C)'s annual Statement of Media Content Policy. We will publish our response to C4C's delivery of its media content duties and plans for the following year as set out in its statement.	Report Q2 2023–24
Public service media programme. Following our review of public service media, 'Small Screen: Big Debate' in 2021, we continue to work with industry, DCMS and the UK and devolved governments on how our recommendations could be implemented to ensure audiences continue to enjoy a range of original UK content, on broadcast services and online; and we will take an in-depth look at how the market is serving the interests of children.	Ongoing
Video-on-demand regulation. We have engaged closely with DCMS following the Government's announcement of its intention to introduce new legislation that would give Ofcom powers to draft and enforce a new video-on-demand code, similar to the Broadcasting Code. We have also commissioned new research to help us better understand audiences' expectations of content available on video-on-demand services.	Publication Q1 2023–24

On-demand programme services (ODPS) accessibility code. As we await clarity on ODPS accessibility requirements, we have launched a review of our Best Practice Guidelines in relation to broadcast accessibility, to update them and to include guidance specific to on-demand services. We plan to consult on changes to these guidelines.	Consultation Q1 2023–24
Monitoring diversity and equality of opportunity in broadcasting. In 2023 we'll launch our new data collection toolkit for broadcasters which includes: A new Equity, Diversity and Inclusion (EDI) self-assessment tool/maturity model for qualitative data collection, evaluation and employee feedback; an expanded quantitative data collection questionnaire; and updated guidance for broadcasters. We will also be publishing our full Equity, Diversity and Inclusion in Broadcasting report for 2022/2023.	Toolkit launch Q1 2023–24 Report on diversity Q3 2023–24
Future of media plurality in the UK. Continuing our review of the future of media plurality in the UK, we will build on our research programme and engage widely with stakeholders. We will consult on proposals on the legal framework in the UK which might adapt to the challenges posed to media plurality by online intermediaries and changing audience habits, ahead of any recommendations to the UK Government by 2024.	Consultation Q3 2023–24
HFSS advertising: Health & Care Bill. We will continue to prepare for the introduction of new statutory restrictions introduced by the UK Government 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.	Ongoing
Online advertising. We will continue to work with DCMS as it reviews the regulation of online advertising, to ensure that advertising regulation across different media remains coherent and effective.	Ongoing
Code on the Scheduling of Television Advertising (COSTA). We expect to confirm any next steps on our review early in 2023–24.	Review Q1 2023–24
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

Content gateways. We will examine the risk that digital content gateways (connected televisions, smart speakers/digital assistants) become an essential route to market in ways that might distort competition, ultimately impacting on the availability, range, quality or pricing of content available to consumers.	Ongoing
Video-sharing platform regulation. We recently published our first report on video-sharing platforms (VSPs) and set out our strategy and areas of focus for the next year of the regime. We will continue our supervisory engagement with notified platforms, work on bringing platforms into compliance where necessary and publish a further report.	Report Q3 2023–24
Online safety programme. Preparing the organisation for new duties as a result of the Online Safety Bill as outlined in our 'roadmap to regulation' document. Priorities and timings are contingent on legislation and include continuing our work to support the legislative process of the Bill; developing our regulatory approach; continued communication and engagement with industry; building trust and awareness; and, setting up our operations.	Ongoing
Developing and consulting on our regulatory approach to Online Safety. We will publish a consultation on our regulatory approach and on codes of practice on illegal harms. We will also look to publish risk assessment guidance for illegal harms.	Ongoing Consultation Q2 2023–24
Developing and consulting on our regulatory approach to protecting children online. We will publish a consultation on our regulatory approach and on codes of practice on protecting children online. We will also look to publish risk assessment guidance for legal harms to children.	Ongoing Consultation 2023–24
Setting up our operations in online safety. We will consult on a fees regime, establish the online safety operating model and implement our peoples transition plan. Our online safety group will be established and fully operational.	Consultation by Q4 2023–24
Developing Ofcom's technical capabilities to support design/implementation of Online Safety regime. We are working to build our understanding of how online services operate in order to inform delivery of the Online Safety regime. This includes specific work on: i) a range of technical issues such as hashing, content moderation, age assurance etc; ii) horizon scanning on tech developments; iii) engaging with academia and knowledge building across Ofcom; iv) leading policy thinking on recommender systems and algorithmic audit; v) leading our work on algorithmic audit and proactive technologies.	Ongoing
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 work across our five spokes, as set out in our approach document in 2021.	Publication Q2 2023–24

Impact of fibre roll-out and emerging technologies on future use of wireless fixed links. We plan to undertake a new review of how spectrum demand for fixed links in existing and higher frequency bands may evolve in the coming decade in light of future fibre roll-out, new emerging wireless technologies such as 5G/6G and LEO satellite and as well as the role of wireless connectivity in providing redundancy for fibre connectivity.	Consultation Q3 2023–24
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, identify unmet demand and consider options to enable this demand. We will continue to do this through a range of channels, including hosting events, inviting stakeholder input, attending, and participating in a range of industry conferences.	Ongoing
Wireless broadband evolution and spectrum implications. Working to understand the potential spectrum requirements of future mobile generations. This includes monitoring emerging demand for spectrum, particularly in the 7-20 GHz range where there has been interest expressed by some in the mobile industry for 6G. This will inform our position on any 6G-related agenda items being proposed for the ITU World Radiocommunications Conference (WRC) meetings in 2023 and 2027.	Ongoing
Future use of upper 6 GHz. We will continue our work looking at the future use of the upper 6 GHz band (6.425-7.125 GHz). The band is being considered for future use by both commercial mobile and low power licence-exempt uses such as Wi-Fi. Internationally, it is subject to work in ITU (it's on the agenda of WRC-23) and within Europe in CEPT. We will aim to influence and react to international developments whilst considering the best approach to the band in the UK. We will explore options for a "hybrid" approach, where both types of use could share access to the band, potentially facilitated by a sharing mechanism or set of rules. We will consult on proposals for the future use of the band in the UK at a suitable time.	Ongoing
Testing innovation via sandboxes. We will work with industry and academia, to explore new ways to enable innovation and sharing, in specific geographic locations and specific bands. We will bring together different wireless users to collaboratively experiment with new sharing techniques in real world environments. By doing so in a sandbox environment, we will be able to better understand the real-world coexistence environment and identify more efficient spectrum sharing solutions.	Ongoing

Future use of 1900 MHz band. The 1900-1920 MHz spectrum band is currently unused. Following consultation responses previously received on proposed annual licence fees for this spectrum (also known as 'unpaired 2100 MHz' spectrum) we plan to consult further on the future use of the band in Q4 2022-23, including on a proposal to revoke the 1900-1920 MHz licences to secure optimal use of the spectrum and maximise benefits for UK citizens and consumers**.**	Statement Q4 2023–24
Future communications needs of utilities. The operational communication requirements for utilities (electricity, gas, and water) are changing as a result of UK government policy objectives to deliver net zero. We are undertaking a review of these communication requirements to determine potential spectrum options for the sector.	Publication Q1 2023–24
Implementing our space spectrum strategy. We will start work on several areas of growth and innovation identified in the space spectrum strategy, including work to update earth station network (ESN) licences and expand access to spectrum for satellite gateways. We will also continue to monitor developments in terrestrial and satellite convergence and identify the relevant spectrum management implications.	ESN Consultation Q1 2023–24 ESN Statement Q4 2023–24 Satellite Gateway Consultation Q4 2023–24
Shared access licence review. We will review our approach to our shared access bands building on our experience since the sharing framework was launched in 2019 and in light of feedback from stakeholders. We have seen interest in shared access grow recently and believe a review would be timely given the recent increase in demand.	Consultation Q3 2023–24
WTA (Wireless Telegraphy Act) licence simplification. Alongside our move to a new licensing platform, we will review our licensing processes and documentation to ensure we have an efficient approach, reducing the burden on our licensees as far as possible and simplifying their engagement with us. A key part of this program will be our review of Amateur licensing.	Amateur radio licences consultation Q1 2023–24 Statement Q4 2023–24
Licensing platform evolution. To provide a better online process for our stakeholders and to enable us to continue to deliver an efficient spectrum licensing service into the future, we will continue to migrate across some of our simpler licences onto our new platform. We also aim to migrate our Shared Access licences, including provision for shared licences in the millimetre wave bands. We will explore ways to further automate our processes and provide clearer information on spectrum availability.	Light licences Q4 2023–24 Shared access licences Q4 2023–24

International engagement on spectrum. We will continue to engage across Europe and globally; working closely with UK stakeholders to ensure that UK interests are reflected in international spectrum decisions and debates. We are overseeing UK preparations and will lead the UK delegation to the World Radiocommunications Conference (WRC) - Dubai November/December 2023.	World Radio Conference Q3 2023–24
Amateur radio licences rReview. We will consult on proposals to simplify our licensing framework for amateur radio licensing and incorporate new areas of amateur radio activity. Our aim is to provide clear updated rules which afford radio amateurs greater freedom to operate, drawing on feedback provided by the sector.	Consultation Q1 2023–24 Statement Q4 2023–24
Award spectrum bands as they are cleared and released. We will make our final decision on the design of the auction of millimetre wave (mmW) spectrum for new and innovative uses, including 5G. We will also consult on our plan to award spectrum in the 1.4 GHz band. The consultation will include our analysis of coexistence challenges with maritime and aeronautical receivers in the adjacent band and options for addressing those challenges.	Statement (mmWave) Q3 2023–24 Consultation (1.4GHz) Q4 2023–24
Monitoring the postal market and Royal Mail's performance. During 2023–24 our monitoring programme will be enhanced to reflect the conclusions of our 2022 review of the future regulatory framework for post: this will include consideration of the impact of new guidance and obligations in the parcels market for the handling of complaints and treatment of disabled customers as well as enhanced monitoring of Royal Mail's efficiency progress and the sustainability of the postal USO.	Report Q3 2023–24
Safeguard caps for post. The current safeguard cap ends in March 2024. We will conduct a review of the appropriate scope and level of the safeguard caps that will apply from April 2024. A consultation is planned for Summer 2023 followed by a statement in Q3.	Consultation Q2 2023–24 Statement Q3 2023–24
Future of TV distribution. We are undertaking cross-cutting internal work looking at the long-term future of distribution for linear TV in the 2030s and beyond. We will explore what the implications might be for audiences and our sectors if the distribution of linear TV were to change, particularly towards an increasingly IP-based model. This work will support a review and advice to Government by 2025, as referenced in its *Up Next* Broadcasting White Paper.	Ongoing
Developing Ofcom's understanding of converged consumers. We have begun looking at digital convergence as a sectoral trend and people's decision making, in particular, the role of trust as a driver of user behaviour and decisions in online comms markets. This work will ensure Ofcom remains responsive and adaptable in the short to medium-term to challenges people might face in online comms markets.	Ongoing

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 its key areas of focus in 2023–24. This will include our joint horizon-scanning function and other key priorities for our cooperation over the year.	Ongoing
Developing Ofcom's understanding of emerging and disruptive technologies. We are seeking to understand the potential impact of technological innovation on the sectors we regulate, including evolutions of known technologies and radical new technologies. Work will include understanding the development and implementation paths for networking technologies expected to underpin 5G advanced and future 6G networks; researching how cross-cutting technologies may change how telecoms and media companies deliver their services.	Ongoing
Developing a strategy for Ofcom's use of data. We are seeking to establish the data strategy that will enable Ofcom to use our data efficiently, effectively and safely in our decision-making processes. The data strategy will be developed collaboratively across the organization across four key pillars: People and Community; Governance, Risk and Reporting; Delivery and Workflow; Data Platform.	Publication Q4 2023–24
Developing Ofcom's approach to the artificial intelligence (AI) regulation framework. We will monitor the development of the UK Government's artificial intelligence regulation framework and will examine how best to implement this in the context of the communications sector.	Ongoing
Engaging with stakeholders and technical standards bodies. We engage with stakeholders on technical issues, publish data, analysis, insight and commentary, and socialise our regulatory approach to create pressure for change. We are also involved in technical standards activity and have established a cross-organisational Technical Standards Coordination Group and will coordinate and provide overall strategic direction to Ofcom's involvement in these bodies.	Ongoing
Transforming Ofcom's capability in data engineering, science, and analytics. We will work to transform Ofcom's capability in data engineering, science and analytics, contributing to the Data Innovation Hub (putting in place infrastructure, tools and processes to ensure we are a data-driven organisation); and in line with our Data Strategy); Online Safety (supporting our role in regulating VSPs and online harms); and the DRCF (e.g. contribute to the DRCF Algorithmic Processing project and other work).	Ongoing

Understanding the impact of our work. We will ensure that our approach to policy appraisal follows best practice and will be revising our impact assessment guidelines. We will continue to assess the impact of our work through our on-going programme of ex-post evaluation.	Ongoing
International engagement. We will continue our dialogues with international regulatory counterparts, governments, academics and others to inform our work across all our sectors. Part of this work will seek to ensure that different national/regional regulatory regimes in the online area are compatible, where possible. We are a founding member of the Global Online Safety Regulators' Network which we will use to drive this agenda.	Ongoing
Horizon scanning. Ofcom has launched a systematic Horizon Scanning function which looks to better understand the biggest themes and trends that will impact our sectors and consumers in the next 5-10 years. This programme of work will deliver strategic insight and informs our policy work to ensure a forward-looking perspective in an increasingly complex landscape where sectors are increasingly converged; and new companies and services are fast-emerging.	Ongoing
Annual diversity report. In Q2 2023–24, we will publish our annual diversity report, detailing equality, diversity and inclusion 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 2022/23. The report helps us to determine our strategic diversity and inclusion priorities and objectives for the coming year.	Report Q2 2023–24
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 2023–24 Publication Q3 2023–24
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 nations of the UK.	Report Q2 2023–24
Online Nation. We will publish our annual report on what people are doing online and their attitudes to, and experiences of, using the internet.	Report Q3 2023–24
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 2023–24

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. 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 2023–24