# Ofcom's Three –Year Plan 2025–2028

28th March 2025
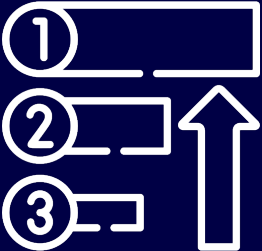
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# Introduction

# Making communications work for everyone

**That is Ofcom's mission. This plan sets out our work from 2025 to 2028.**

## Our role since 2003.

Ofcom's core legal duty is unchanged: to further the interests of citizens and consumers, where appropriate by promoting competition, and having regard amongst other things to encouraging investment, innovation and growth. We must serve citizens and consumers today and tomorrow – ensuring fairness and affordability now, and the investment that will maintain good services in future.

## New challenges.

With the benefits of change have come new risks across our remit, including online safety and cyber security – such as harmful content and behaviour online; huge demand for scarce wireless airwaves; competitive threats to public service media; and declining letter volumes in post.
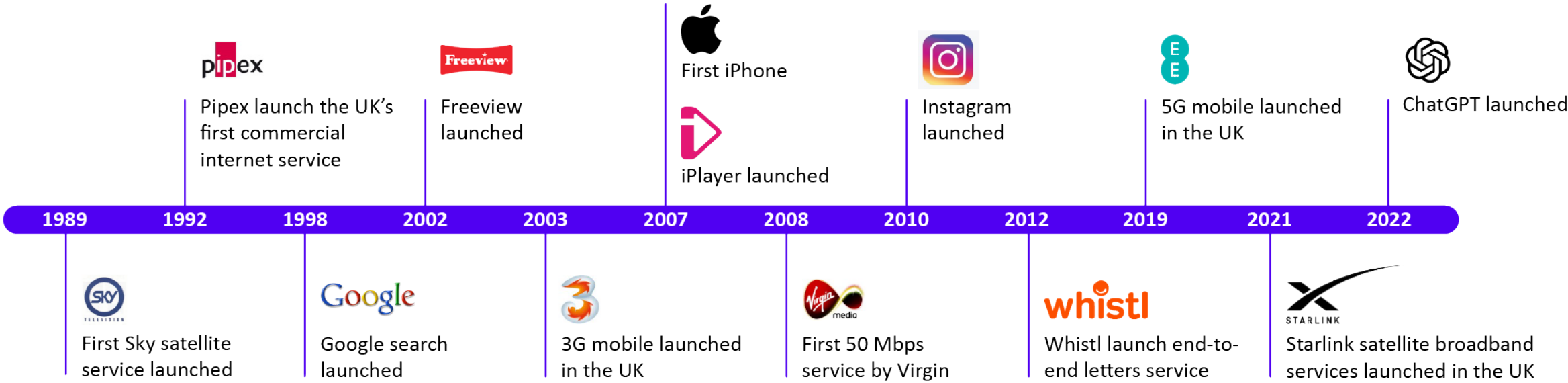
## A changing world.

The communications world has changed, and our remit has grown. Social media has transformed personal interaction. Mobile broadband and the cloud are making the internet everywhere and always-on. We interact, stay informed and entertained through an unprecedented choice of high-speed, high-quality networks and services which power the modern economy.

# Innovation in communications services



Pipex launch the UK's first commercial internet service

Freeview launched

First iPhone

iPlayer launched

Instagram launched

5G mobile launched in the UK

ChatGPT launched

| 1989 | 1992 | 1998 | 2002 | 2003 | 2007 | 2008 | 2010 | 2012 | 2019 | 2021 | 2022 |

First Sky satellite service launched

Google search launched

3G mobile launched in the UK

First 50 Mbps service by Virgin

Whistl launch end-to-end letters service

Starlink satellite broadband services launched in the UK

# Supporting growth through regulation

**Good regulation and economic growth go hand in hand. We are a regulator that backs innovation and supports investment in the new networks the UK needs. We'll keep doing this over the next three years.**
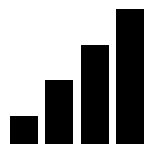
### Promoting investment in broadband and mobile.
Confirming the second half of our ten-year framework to secure competitive investment in full fibre. Providing mobile users with better coverage information to boost competition and transparency.

### Using spectrum to power innovation across the economy.
Including greater use of spectrum sharing; establishing a framework for direct-to-device satellite connections; and building on our innovation and trial licensing regime.

### Supporting the UK's creative industries.
Implementing the Media Act and launching a new review of public service broadcasters, who remain the largest commissioners of UK content. We will report this summer on policy reforms to support this vital sector and ensure the sustainability of high-quality news.

### Helping small businesses.
Tailoring our approach for small businesses, including the Digital Support Service which provides interactive guidance to help small low-risk businesses to comply as easily as possible with the Online Safety Act.

# Context

**The communications industries are defined by innovation, disruption and change.**

To harness the benefits for the UK, we must understand the technological, commercial and consumer forces that will shape these sectors over the coming years.

# How communications will evolve

**We have identified six trends across consumer, commercial and technology**

## Consumer ─────────────────────────

**Changing consumer needs, which we track through world-class research**

**Shifting consumer trust –** Technology is enabling synthetic media and scams, affecting trust in news and public institutions
**Audience choice and fragmentation –** Increased choice of services that appeal to specific groups is fragmentating audiences across platforms & devices

## Commercial ─────────────────────────

**Businesses are seeking to benefit from digital transformation**

**Economic growth –** Boosting overall economic growth and tackling digital exclusion are priorities for the UK and for Ofcom
**New business models –** New business models, and the increasing role of global players operating across the value chain, are challenging existing players and change our sectors

## Technology ─────────────────────────

**Technology is improving choice, price and innovation, but also presents new questions**

**AI proliferation –** The continued growth and impact of AI is transforming our industries with potential for new business models, efficiencies, value chains and risks
**Network resilience –** From extreme weather to state-backed cyber attacks, our networks are braced for security and resilience shocks

# The drivers of change

## Telecoms

- Demand for reliable digital infrastructure continues to grow, demanding investment in full fibre and gigabit-capable broadband.
- The telecoms value chain is evolving with operators increasingly using software-based networks to complement physical networks.

**What this means:** We must adapt to changes from increased digitisation, both in the telecoms value chain and in consumer behaviour as new services are adopted.

**More than**

# two-thirds

**of UK homes have access to full fibre broadband (69%)**
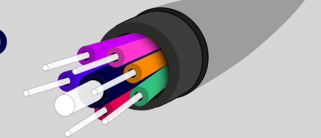
## Spectrum and Wireless

- Demand for spectrum is driven by the growing space sector – such as low earth orbit satellite constellations and non-terrestrial direct-to-device services – as well as growth in commercial mobile and Wi-Fi.
- Global coordination on spectrum allocation and harmonisation is more important than ever.

**What this means:** Good wireless connections increasingly underpin all our sectors and drive growth across the economy. Airwaves must be managed efficiently to support this.

**Satellite broadband connections have more than doubled in the last year**

87,000 UK homes are now connected, up from 42,000 in 2023

# The drivers of change

## Broadcast & Media



- Growing use of news through outlets including social media, as well as greater use of Generative AI (Gen-AI) and AI recommender systems, have implications for choice and trust in news.
- Viewing of linear TV continues to fall, while viewing of streaming services and video-sharing platforms grows – especially on TV sets.
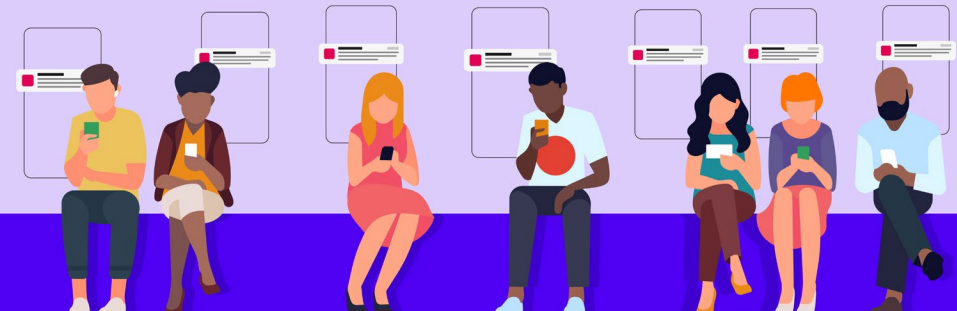
**What this means:** Our regulation needs to keep pace with changing technology and audience expectations, with more consistency across linear and on-demand platforms.



**Breaking News**                    21m ago
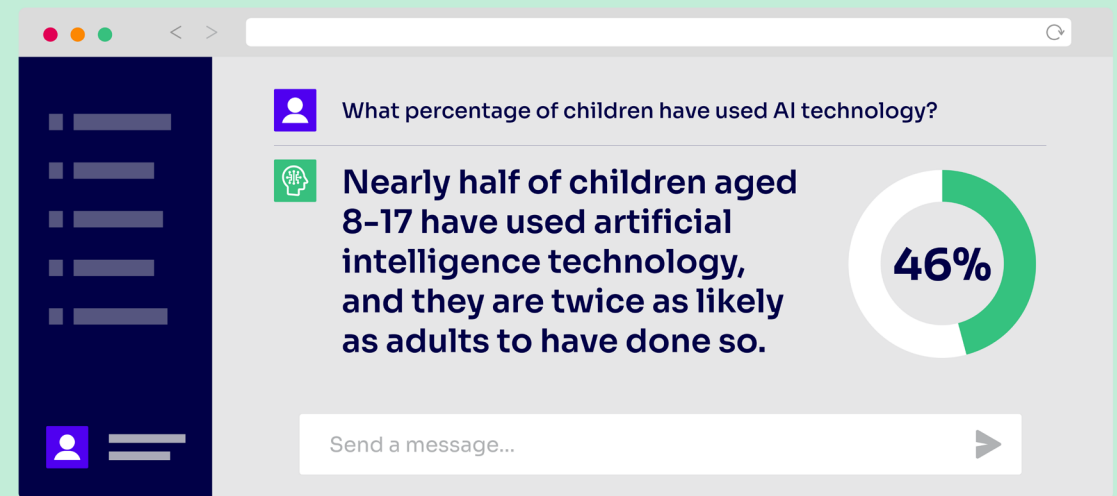For the first time, more adults access news online (71%) than via TV (70%)

## Online Safety



- The risk of harmful content online – including scams and fraud – is exacerbated by technological developments. These include the use of Gen-AI to create synthetic media and agentic AI.
- Technology and AI itself can help tackle these risks. One example is innovation in safety mechanisms in areas such as age assurance.

**What this means:** Our regulation needs to be highly agile and responsive to technological developments to deliver a safer life online.



What percentage of children have used AI technology?

**Nearly half of children aged 8–17 have used artificial intelligence technology, and they are twice as likely as adults to have done so.**

**46%**

Send a message...

# Priorities

In this section we cover the major projects and programmes that will meet our ambitions over the next three years.

# What we want to achieve across our priorities

**Our projects and programmes reflect our legal duties. Within those, our work is guided by our priority outcomes.**

## Internet and post we can rely on

- Investment in high-quality networks and services which are available where they are needed

- Reliable and secure networks and services that people can depend on

- Efficient and sustainable markets where competition delivers choice, value and high-quality services

- Consumers treated fairly at every stage of the customer journey, regardless of their circumstances

- A sustainable, affordable postal service available across the UK that meets evolving customer needs

## Media we trust and value

- Audiences can find and access a wide range of content, including PSM content which is produced across the UK and reflects its diversity

- Audiences can find and access a plurality of news that is duly accurate, duly impartial and trusted

- Media providers compete fairly and openly for audiences

- Audiences are protected from harm, and freedom of expression is safeguarded

## We live a safer life online

- Stronger safety governance in online services based on clear understanding of risks

- Online services designed and operated with safety in mind

- Increased choice for users so they can have meaningful control over their online experiences

- Enhanced trust in the online world through more transparency in how platforms keep users safe

- Continue to set up the online safety regime for success with the right people, systems, processes and relationships in place

## Enabling wireless in the UK economy

- Assure stakeholder access to spectrum and mitigate harmful interference through licensing, planning, monitoring and compliance activities that enable wireless services

- Identify and make available spectrum to meet evolving needs of sectors, including mobile broadband and space services

- Evolve our spectrum management frameworks to support increased efficiency of use, enhance speed and flexibility of access and improve spectrum availability

- Lead and influence international discussions on spectrum access while effectively representing UK interests

# Internet and post we can rely on

We want everyone, everywhere to have a choice of fast, affordable, reliable networks and services that also drive economic growth. Postal services should also be affordable, reliable and sustainable, meeting the needs of all consumers and particularly those who might be vulnerable.

| Projects and programmes | |
|---|---|
| **Broadband infrastructure** | • Second half of our ten-year strategy to promote competition and investment in gigabit-capable broadband for 2026-31, providing greater choice and faster, more reliable connections to homes and offices.<br>• Gigabit-capable broadband is now available to 25m homes (83%) and more than 20.7m homes (69%) can access full fibre.<br>Full-fibre coverage could reach 96% by 2027 with the right regulation and support.<br>• We have already started this work, with our final decisions in 2026 and monitoring of Openreach and the market to continue after that. |
| **Mobile investment** | • Working with industry and other stakeholders to improve mobile connections. Ofcom will monitor and enforce commitments established as part of the Vodafone/Three merger, which will improve coverage over an eight-year period.<br>• Working with providers to improve coverage and performance data, giving mobile users a more accurate picture of mobile services where they live and work. This will improve transparency and should increase investment incentives among providers. |
| **Telecoms security** | • Ofcom helps to ensure people across the UK can rely on resilient and secure networks. We work closely with telecoms firms so they improve their security, and we monitor their compliance with security duties.<br>• We will continue to embed this major regime through our monitoring and reporting on compliance and enforcement action when needed. |
| **Postal regulation** | • There is an urgent need to align the universal postal service to the needs of users and to keep it sustainable.<br>• We have set out a package of reforms to the service and will review other aspects of postal regulation, including affordability. This will be a focus for the first two years of the Plan followed by ongoing monitoring, given the scale of change needed by Royal Mail. |

# Media we trust and value

The broadcasting sector is a vital part of the UK's culture and drives economic growth. We want audiences to find and enjoy diverse, high-quality UK content. People moving online for entertainment and information should be protected against harmful content and able to find trusted news.

| Projects and programmes | |
|---|---|
| **Media Act implementation** | • The Media Act reflects recommendations we made in our last public service media (PSM) review. These support the sector in an increasingly global market, as audience habits change, and ensure our regulation remains effective.<br>• Includes maintaining easy access to live and on-demand PSM content and extending content standards to video on-demand (VoD) services. Our work on this programme is already in progress and will run through the first year of the Plan. |
| **Public Service Media (PSM) Review** | • Given the pace of change, we will assess what is needed beyond measures included in the Media Act to maintain and strengthen public service media and a thriving production sector.<br>• We will focus on opportunities to maintain and strengthen PSM and the availability of high-quality, accurate news that audiences can trust. This review will take place in the first year of the Plan but could lead to further work in subsequent years. |
| **BBC regulation** | • We ensure the BBC continues to meet the needs of audiences across the UK. We will do this through our work to monitor the BBC's performance and its market impact throughout the period of the Plan.<br>• We will also conduct a periodic review of how the BBC is fulfilling its Mission and Public Purposes, ahead of the Government's Charter Review process leading up to the end of the current Charter in 2027. |
| **Protecting audiences from the most serious harm** | • We protect audiences from harmful and offensive material on television services, taking account of freedom of expression.<br>• We will focus this work on what matters most to audiences throughout the three years of the Plan – notably the impartiality and accuracy of news. |

# We live a safer life online

Our goal is to create a safer life online for people in the UK, especially children. We are now enforcing parts of the Online Safety Act, with all remaining areas going live during the three-year period. This will deliver real change to the online experience. Effective age checks will protect children from pornographic, suicide and self-harm content. Social media and other services will establish processes for taking down illegal content including child sexual abuse, fraud and terror.

| Projects and programmes | |
| --- | --- |
| **Delivering safer outcomes** | • Illegal content will be taken down quickly – including fraud, terror, incitement to violence and suicide material.<br>• Children will be better protected, with robust and safer algorithms to screen out self-harm, pornography and other harmful content.<br>• Children will be protected from contact with unknown adults, and it will be much harder for abusers to share child sexual abuse material.<br>• Women and girls will be better protected from misogyny, harassment and abuse online. |
| **Transparency and accountability** | • Tech firms will need to put users' protection at the heart of their governance and product design, tackling risks to users and naming senior accountable people for user safety.<br>• Our transparency reports will shine a light on industry practice and performance, setting out the steps services must take.<br>• We will introduce arrangements for super-complaints and any new researcher-access regime Government decides to introduce. |
| **Building capability** | • We will invest in our supervision and enforcement functions to drive improvements in firms' safety measures and ensure compliance with the new rules. As part of this we will provide a Digital Support Service and help small low-risk businesses to comply as easily as possible.<br>• We will work with partners in the UK and abroad, including other regulators, law enforcement, civil society and other public bodies, to collaborate on our shared goal to protect users and ensure harmonised regulation.<br>• We will continue to use our horizon-scanning programme and data innovation centre to track emerging technologies and trends. |

# Enabling wireless in the UK economy

Radio spectrum underpins a wide range of services that we rely on every day – including mobile, Wi-Fi, Bluetooth, broadcast radio, television and satellite navigation. As we manage this scarce resource we will support demand for new products, enable innovation and aid economic growth.

| Projects and programmes | |
|---|---|
| **Investing in the space sector** | • The growing space and satellite sector supports a range of services to the UK such as broadband, TV and global positioning. We will continue to prioritise our policy work on space and will make spectrum available to support these services.<br>• We will make additional spectrum available for land-based satellite terminals and satellite gateways to support broadband growth and have consulted on direct-to-device satellite mobile services. We will focus on our space work in the lead up to the World Radiocommunication Conference in 2027 (WRC-27) which has a space-heavy agenda. |
| **Mobile spectrum release, authorisation and auctions** | • We will continue to auction and release spectrum to support growth in access networks such as commercial mobile and Wi-Fi.<br>• Over the three years we will complete our work on the mmWave, 1.4 GHz bands, and the initial release of the upper 6 GHz band. |
| **International engagement** | • We represent the UK's interests in international spectrum fora – such as WRC-27 and the International Telecommunication Union (ITU) – to ensure that people and businesses benefit from technological innovation and harmonised equipment.<br>• We will prioritise our international engagement to influence the international spectrum management agenda and ensure that standards support future growth and innovation priorities for the UK. |
| **Spectrum management infrastructure** | • We will continue to modernise our spectrum management systems to improve our operational efficiency and automate licensing processes with better information to improve our service to licensees.<br>• In the field and the lab, we are exploring the use of new equipment, data and analytics to improve our management of interference for a wide variety of services. |

# Our cross-cutting priorities

Ofcom's cross-sector role allows us to take a unified approach to making communications work for everyone. The following priorities cut across sectors. They complement our work within each sector and are similarly shaped by global changes to our industries and the wider economy.

## Digital Markets

Digital markets such as search, social media and cloud computing have transformed and enriched the way people live and work. But left unchecked they can develop competition problems, so people and businesses who rely on them could lose out.

The Competition and Markets Authority (CMA) is now the primary regulator for digital markets through the Digital Markets Unit (DMU).

- As a concurrent regulator we will support the DMU in work that relates to our sectors.

- We will monitor potential risks and benefits across communications markets, including edge computing and video-sharing platforms (VSPs).

## Media Literacy

Media literacy is the ability to use, understand and create media and communications across multiple formats and services. Issues in this area range from tech-savvy early-adopters struggling to manage screen addiction, to people offline who are fearful to try new services. We recently published our Media Literacy Strategy for the coming three years.

- We will convene and amplify what works through our Making Sense of Media programme, working with a broad range of organisations.

- We will set out our first Statement of Recommendations for online platforms.

- Media literacy has a role in delivering media we trust and value – which we will recognise in our PSM Review and input to the BBC Charter Review.

## Digital Transitions

The transition from older technologies to modern, efficient digital ones is essential for economic growth, productivity, innovation and security. But as high-speed broadband and mobile networks are rolled out, take-up can lag behind. People on older technologies risk exclusion, poorer service and higher costs. For industry, maintaining both old and new networks is costly and undermines resilience.

- We will continue to collaborate with industry and Government to ensure that people – particularly the most vulnerable – are supported and protected.

- We will consider how digital transitions can deliver the best outcomes for citizens, industry, and economic growth.

# Planned phases of our key projects and programmes

| | | 2025-26 | 2026-27 | 2027-28 |
|---|---|---|---|---|
| **Internet and post we can rely on** | **Broadband infrastructure:** | Telecoms Access Review completed | | |
| | **Mobile investment:** | Mobile investment ongoing work programme | | |
| | **Telecoms security:** | Telecoms security ongoing work programme | | |
| | **Postal regulation:** | Future of USO published | Ongoing post monitoring | |
| **Media we trust & value** | **Media Act implementation:** | Media Act implemented | | |
| | **PSM Review:** | PSM Review published | | |
| | **BBC regulation:** | BBC Periodic Review completed | Ongoing BBC work programme | |
| | **Protecting audiences from harm:** | New VoD Code and accessibility requirements published | Ongoing audience protection work | New VoD Codes and interim accessibility quotas in force |
| **We live a safer life online** | **Delivering safer outcomes:** | All OS duties consultations published | Ongoing supervision and enforcement | |
| | **Transparency and accountability:** | Platform transparency notices / Platform transparency reports | Ofcom transparency report | Ongoing platform notices and reporting |
| | | Progress update | | |
| | **Building capability:** | Enhancing operational performance  (Y1) Engagement and partnerships work (ongoing) | | |
| **Enabling wireless services** | **Investing in the space sector:** | Increased space policy work | | Upper 6GHz – additional uses for commercial mobile |
| | **Mobile spectrum release:** | Upper and Lower 6GHz – additional uses for Wi-Fi | | Future spectrum releases (tbd) |
| | **International engagement:** | mmWave auction / 1.4GHz statement | Preparation for WRC-27 | |
| | **Spectrum management:** | Spectrum management ongoing work programme | | |