
Ofcom's plan of work 2021/22

Making communications work for everyone

[Ofcom's plan of work 2021/22](#) – Welsh translation

STATEMENT:

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1. Chief Executive's foreword



Ofcom is the UK's communications regulator, with a mission to make communications work for everyone. We serve the interests of consumers and businesses across the UK's nations and regions, through our work in mobile and fixed telecoms, broadcasting, spectrum, post and online services.

Over the past year we have learned that being connected is everything. High-quality, reliable communications services have never mattered more to people's lives. But as consumers shift their habits increasingly online, our communications sectors are transforming fast. It is an exciting moment for our industries and for Ofcom as a regulator - it requires long-term focus alongside speed and agility in response to change. Against this backdrop our statement sets out our detailed goals for the coming financial year, and how we plan to achieve them.

On telecoms, Ofcom has just confirmed a new long-term framework for investment in gigabit-capable fixed networks. In the coming year, we will shift our focus to support delivery against this programme, alongside investment and innovation in 5G and new mobile infrastructure. Following legislation in Parliament, we will put in place new rules to hold operators to account for the security and resilience of their networks. We will continue to support consumers, enabling them to take advantage of the choices available, and stepping in to protect their interests where we need to.

Managing the UK's radio spectrum remains at the heart of Ofcom's work. Our Spectrum Strategy supports innovation in wireless technologies that will support a diverse range of uses, ranging from the automation of factories and agriculture to monitoring our natural environment to understand the effects of climate change.

The UK's broadcast and radio sectors are highly valued by viewers and listeners, but need to adapt rapidly to new technologies and changes in viewer behaviour. We will present recommendations to the Government on how to create a strong and competitive environment for public service media in the future. We will also take forward our periodic review of the BBC and start to modernise its operating licence. We will continue to oversee content standards and competition across the industry and hold broadcasters to account for improving diversity both on and off screen.

This year our remit expands to include the safety of online services. In March we issued guidance relating to our new role regulating video-sharing platforms. The Government has also confirmed that Ofcom will be the regulator for a new online safety regime, once legislation has been passed. Ofcom's approach to these new roles will be guided by a clear understanding of consumer needs and expectations online, and rooted in our long-standing experience of balancing freedom of expression with protection against harm.

In the coming year we will step up our preparations to take on these significant new tasks. We will significantly grow our expertise in digital technologies, data analytics and cyber security, and will strengthen ties with our fellow digital regulators and other partners. We are excited to be opening a

new hub in Manchester which will serve as a base for our new work on online safety and telecoms network security.

I would like to thank everyone who responded to our consultation on this year's plan of work and attended our virtual events, helping us to shape our programme for the year ahead. Your interest and input forms a vital part of our work and we hope that, as we commit to our plan, you will continue to follow our progress through this exciting year.

A handwritten signature in black ink, reading "Melanie Dawes". The signature is written in a cursive style with a large initial 'M' and 'D'.

Dame Melanie Dawes, Chief Executive

2. Overview

Communications services are more important than ever

2.1 Over the past year being connected has never mattered more. The impact of the pandemic has transformed our lives as the communications industries have overcome major challenges to keep the UK connected, entertained and informed.

2.2 Access to reliable broadband has become an essential service. We need it for so much of our day-to-day lives, whether we are watching BBC iPlayer, sharing pictures with friends and family on WhatsApp, joining online classrooms via Zoom, shopping for groceries, or paying a tax bill via GOV.UK. Reliable broadband has also kept the nation productive with many employees moving to remote working. People spend around three and a half hours online per day on smartphones, tablets and computers and over an hour watching online subscription video services.

2.3 All of this has served to drive record levels of traffic across the UK’s fixed and mobile networks, which stayed resilient despite the additional demand they faced. Meanwhile, the UK’s delivery and postal networks have provided essential goods and been a lifeline for many as we shifted our shopping online. Parcel volumes have flourished, although people have continued to send fewer letters.

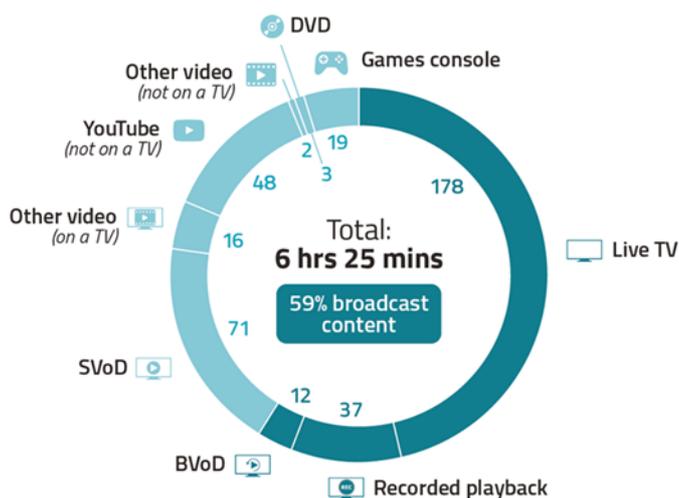
2.4 TV and radio reached record audiences, providing high-quality and accurate news which was especially critical in the midst of misinformation and disinformation about the pandemic. In April

2020 viewers were watching up to 6 hours and 25 minutes of content per day, an hour and a half more than in 2019. Subscription video-on-demand services such as Netflix benefited, but so did traditional broadcasters who

kept us informed, educated and entertained against a challenging commercial backdrop with significant restrictions on production and diminishing advertising revenue.

2.5 Online platforms played their part in keeping us connected and platforms such as Twitter, Facebook and Google took welcome and necessary steps to address misinformation about the coronavirus, as well as promoting trusted news sources.

2.6 Looking forwards, we have established new habits which will have implications for the communications networks and services we rely on. At the same time it is clear that the role



of communications services – post, telecoms, broadcasting and online services – is becoming more central to our lives and to the economy.

The UK's networks need to meet current and future demands for connectivity

- 2.7 People in all parts of the UK need to be able to get online at home and on the move. Both fixed and mobile networks are continuing to expand their coverage. At the end of 2020, superfast broadband and 4G networks were available to 96% and 98-99% of UK homes respectively. Mobile operators are rolling out the Shared Rural Network (SRN) which will take 4G coverage to 95% of the UK's landmass by 2025.
- 2.8 But as use of communications services continues to grow, so will the need for faster speeds and greater reliability. People and businesses have demanded more bandwidth this year, especially during lockdown. On Boxing Day 2020 the UK's networks faced a new peak of internet traffic, with 210 petabytes of data consumed via the Openreach network.¹ The UK's networks remained resilient through the pandemic, but further investment will be needed to make sure they can continue to meet demand.
- 2.9 Network providers also need to invest in technologies for the future, to give consumers the services they need. Ofcom's approach is to promote competition in order to encourage this. We recently published rules to promote investment in full-fibre networks in our Wholesale Fixed Telecoms Market Review. Next, our mobile strategy will consider how we can best support the delivery of high-quality mobile connectivity and innovation.
- 2.10 With so much of our lives now spent online, the security and resilience of our networks is crucial, not only to meet growing demands but also in relation to security threats. Ofcom will receive strengthened powers later this year to make sure operators continue to invest in the security of their networks.
- 2.11 Alongside investment for the future, there is still work to be done to provide better access to decent broadband and mobile coverage across the UK right now. Being disconnected during the pandemic highlighted the challenges for those who cannot access these services – either because they are not available where they live or because they are excluded for financial reasons. Ofcom will continue to implement the Universal Service Obligation (USO) for fixed broadband, which gives the right to request a decent, affordable connection, and will help some of the 190,000 properties currently without such access.² However, the very high costs of building to some of the most remote locations across the UK might mean the broadband USO will not cater for them, so we will also work with the Government to explore the options for the hardest-to-reach premises. And we will continue to monitor where households have difficulty paying for communications services, considering whether any measures are needed to support access to communications services for the financially

¹ <https://www.openreach.com/news/uk-broadband-usage-more-than-doubled-in-2020---driven-by-live-sport-online-gaming-and-home-working/>

² <https://www.ofcom.org.uk/phones-telecoms-and-internet/advice-for-consumers/broadband-uso-need-to-know>

vulnerable. Our research last year showed that around one in five families had experienced financial difficulties relating to at least one of their communications services.

- 2.12 Just as more of our day-to-day lives are moving online, so are more parts of the economy, as well as public services. The most recent spectrum auction will support the rollout of 5G services and help address the rapidly evolving demand for wireless connectivity. Wireless technologies will enable innovation in areas as diverse as the automation of factories and monitoring our environmental impact, as well as supporting ports' and airports' operations and improving the delivery of health services.
- 2.13 This is only part of the role that spectrum plays in supporting important sectors and services. By making sure legitimate users are able to use spectrum we support key services in a wide range of areas including TV and radio broadcasting, satellite communications, shipping, utilities management and the emergency services.

We want to support innovation in our sectors while protecting customers

- 2.14 With so much change in the sectors we regulate, Ofcom's regulation needs to create the space for businesses to adapt their services and invest in new technologies, content and infrastructure. These sectors make a major contribution to the UK economy and we want to make sure they are supported, with competition driving a fair deal for people across the UK.
- 2.15 This year fairness for customers and protecting consumers will remain a priority for us, across all sectors. Whether they are trying to find the right deal or switching between providers, people and businesses should be able to trust that markets operate with integrity. The protection of vulnerable people and those who are excluded from communications services is a major concern. The UK's biggest broadband, phone and pay-TV companies have signed up to our six Fairness for Customers commitments, and we will keep working with them to meet and deliver on these commitments. We will also be looking at the needs of postal users and whether they have adequate protection as part of our wider review of postal regulation.
- 2.16 The UK broadcasting sector is evolving fast. More capable broadband networks and technological innovation are transforming the way audiences access content. The landscape of content creators, aggregators and platforms has become more complex. Unprecedented choice and greater breadth in professional and user-generated content has brought huge benefits for audiences. But it also means that audiences are becoming increasingly fragmented, presenting challenges for UK broadcasters.
- 2.17 In December we published the initial findings of our review of public service broadcasting (PSB), *Small Screen: Big Debate*. We found that PSB content is still highly valued by audiences, and that the public service broadcasters play a vital role in underpinning the UK's creative economy, representing diverse audiences and reflecting the UK back to itself. However, traditional broadcasters need to innovate to compete with newer competitors, including global tech companies. As part of the review we have consulted on what a PSB framework could look like in the future, and we will be making our recommendations to

the Government in the summer. We will also continue to hold the TV and radio sectors to account for diversity on and off screen, so that they reflect people across the whole of the UK.

- 2.18 Protecting audiences from harm on TV and radio also remains a central part of our work. This year we have seen a record number of complaints, partly driven by misinformation and disinformation relating to the pandemic.
- 2.19 Protecting people from harmful content online is just as important as on traditional TV and radio. Our research shows that a third of people believe the risks of being online – to them or their children – have started to outweigh the benefits. In the coming year we will fulfil our new duty to make sure that UK-established video-sharing platforms (VSPs) take appropriate measures to protect children from content that may be harmful to them, and to protect the general public from criminal content and material likely to incite violence or hatred.
- 2.20 Later this year, the Government will bring forward legislation to give Ofcom new duties as part of its online safety regime. We will be stepping up our preparations for this significant new role, building on our responsibilities for VSPs, as well as drawing on our media literacy programme (Making Sense of Media), and our long experience of protecting viewers and listeners from harm while preserving freedom of expression.

Ofcom will evolve the way we work to meet these challenges

- 2.21 This year we are ready to adapt and develop as we keep pace with change across our sectors and new legislation regarding network security and online safety.
- 2.22 Over the past few years we have increased our expertise in areas such as data analytics and digital technology. With our new responsibilities we will bring about a step change to our skills and capabilities in these areas as well as in emerging technologies, digital markets, and the commercial drivers of online platforms.
- 2.23 We will also drive forward our plan³ – which includes stretching targets for 2025 – to build a more diverse and inclusive workforce, enabling us to attract the best talent the UK has to offer. This year we will be opening a new hub in Manchester, with a particular focus on online safety, the tech sector and network security. We will also be looking to grow our presence in our offices in Belfast, Cardiff and Edinburgh to ensure that we are able to attract the best talent the UK has to offer and that we are representative of all parts of the UK.
- 2.24 Ofcom's independence as a regulator is an important part of our legal framework. Alongside this, as our industries face unprecedented change, our partnerships with other organisations will become even more important. This includes industry, academia, charities and other experts, as well as our fellow regulators at home and internationally, and governments across the UK. In particular, as Ofcom, the Competition and Markets

³ [Ofcom's diversity and inclusion strategy](#)

Authority and the Information Commissioner's Office plan for new responsibilities in the digital sphere, we need to work together even more closely on behalf of the consumer to make sure that the platforms compete fairly, use people's data appropriately and protect against harm.⁴ Together, as the Digital Regulation Cooperation Forum, we published a new joint workplan in March 2021 for the year ahead, marking a step change in our joint working as three independent regulatory bodies.⁵

- 2.25 This plan of work sets out what we will do during 2021/22, to make sure Ofcom plays its part in addressing the challenges for people and businesses in the UK today, and in the future.

⁴ The Financial Conduct Authority will join the DRCF as a member from April 2021.

⁵ [Digital Regulation Cooperation Forum: Plan of work for 2021 to 2022 \(ofcom.org.uk\)](https://www.ofcom.gov.uk/digital-regulation-cooperation-forum/plan-of-work-2021-to-2022/)

2.26 Our strategic priorities for the next financial year:

- **Investment in strong, secure networks.** We will support ongoing investment in faster broadband and better quality mobile networks. We will also continue to implement telecoms security legislation, working with industry to ensure the UK's vital communications networks are safe, secure and resilient.
- **Getting everyone connected.** We want to make sure people and businesses can access key communications services. We will continue our work to improve access to broadband services in the hardest-to-reach locations. We will monitor delivery of the universal broadband service and will report on progress to improve mobile coverage under the Shared Rural Network programme. We will also work to make sure that the universal postal service is sustainable for the future.
- **Fairness for customers.** We want people to shop around with confidence, make informed choices, switch easily and get a fair deal, and for markets to work well so people can do just that. As part of that, we will continue our work to ensure broadband, phone and TV customers, particularly vulnerable customers, are treated fairly.
- **Supporting and developing UK broadcasting.** We will support the UK's vibrant media sector, including public service broadcasting, helping it to evolve to meet the changing needs of viewers and listeners. We will also continue to report on the BBC's performance and monitor its impact to ensure it is delivering its mission and public purposes.
- **Preparing to regulate online harms.** We will regulate UK-established video-sharing platforms under the new regime, which will provide a strong foundation ahead of the introduction of broader online safety laws. The UK Government has confirmed its intention to appoint Ofcom as the regulator for online harms and we are preparing for this planned new role, subject to Parliament passing the necessary legislation.

In addition to this work, we will also be taking steps to make sure we are well positioned to carry out our duties both now and in the future.

- **Strengthening Ofcom for the future.** As our sectors and our duties are increasingly shaped by online services, we will invest in our skills, develop innovative working practices and build a diverse workforce that reflects the whole of the UK.
- **Developing new partnerships.** We will develop new, and build on existing, domestic and international partnerships with regulators, academia, governments, industry and organisations across sectors we regulate to enhance our understanding and promote consumer benefits.

3. Our goals and priorities for 2021/22

- 3.1 Ofcom's purpose is to make communications work for everyone. Our duties are set out in a number of acts of Parliament. Our principal duty is to 'further the interests of citizens and consumers in relation to communications matters, where appropriate by promoting competition'. Further information about our statutory duties is set out in Annex 1.
- 3.2 The Government has set out its policy priorities in relation to telecommunications, the management of radio spectrum and postal services in its Statement of Strategic Priorities (SSP).⁶ Ofcom must have regard to the SSP when exercising its regulatory functions. We have done so in developing this plan of work, as follows:
- **World-class digital infrastructure.** Under the theme 'Investment in strong, secure networks' we are promoting competition and investment in new networks and the use of 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 takes account of the conclusions of the Government's Future Telecoms Infrastructure Review.⁷
 - **Furthering the interests of telecoms consumers.** The Government's commitment is to safeguard telecoms consumers' interests, including those who are vulnerable. Under the theme 'Fairness for customers' we address switching, pricing, and the use of consumer data that directly supports these outcomes.
 - **Secure and resilient telecoms infrastructure.** Our work under the theme 'Investment in strong, secure networks' supports the Government's commitment to network resilience and security.
 - **Postal services.** Our ongoing work in 'Getting everyone connected', includes reviewing whether regulation of the sector needs to change in light of market changes and evolving user needs.
- 3.3 Below, we set out the priority work areas for the year. This includes details and important milestones of our priority projects and programmes. Our wider plan of work, including these highlighted areas of work, can be found in Annex 2.

⁶ <https://www.gov.uk/government/publications/statement-of-strategic-priorities>

⁷ [Future Telecoms Infrastructure Review - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/publications/future-telecoms-infrastructure-review)

Strategic priorities

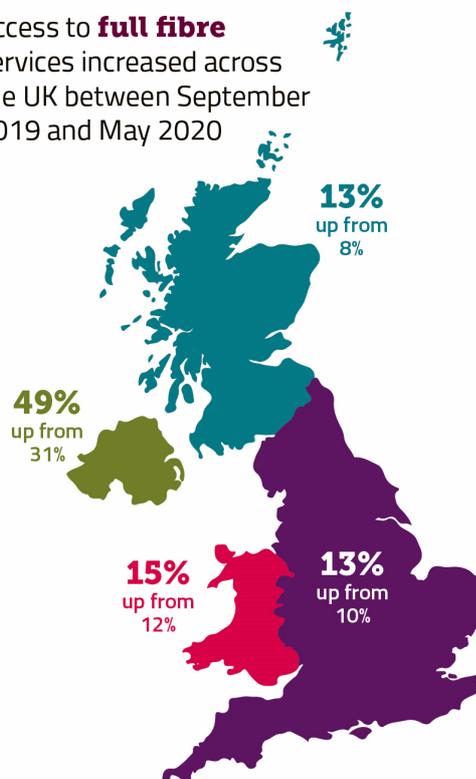


Investment in strong, secure networks

We want to encourage investment in the UK’s communications networks by creating a supportive regulatory environment which delivers the faster broadband and better quality mobile networks people need. We will work with industry to ensure the UK’s vital networks are safe, secure and resilient.

3.4 Thanks to investment in our communications infrastructure 96% of UK homes can now access superfast broadband (download speeds of at least 30Mbit/s) and, in December 2020, 18% of homes had access to full fibre broadband. Increased use of communications services during lockdown has shown that we need better, faster networks to keep up with people’s changing needs. We must now do more to build our infrastructure and create the conditions for greater connectivity.

Access to **full fibre** services increased across the UK between September 2019 and May 2020



3.5 Our increasing dependency on communications services makes it imperative that networks are reliable and resilient – especially during times of crisis and challenge. We want to encourage communications companies to make sure their networks are strong, secure and protected in the face of potential outages.

3.6 This increasing dependence on communications services raises more opportunities for cyber-attacks, so we need industry to continue to invest in the security of their networks. Ofcom will have an enhanced role in telecoms security following legislation.

3.7 During the next financial year our key priorities will include:

- **Mobile strategy.** We will develop a strategy for our approach to the sector that underpins our future regulation and supports the delivery of high-quality connectivity and innovation to meet people’s needs in the future. We will look at changes taking place within the sector, as well as the impact of changes outside it, to assess how the market operates and how it is likely to evolve over the next five to ten years. This will include looking at the growing role of major tech firms and the potential for greater fixed-mobile convergence. The two-phase review will firstly focus on evidence gathering, including a discussion document to invite stakeholders’ views, and then secondly build on stakeholder responses to draw initial conclusions, setting out any next steps.
- **Telecoms security framework implementation.** We will continue to work with the Government to implement its telecoms security legislation, working with industry, to make sure that operators adhere to strengthened security obligations.

3.8 Alongside the key priorities outlined above, our ongoing work programme will support people and businesses to have the communications networks they need. Our work under this theme includes:

- **Promoting fibre rollout.** Investment in fibre will remain a key area of focus for us. With our Wholesale Fixed Telecoms Market Review now concluded we will continue to promote fibre deployment through our work, ensuring providers have access to Openreach’s ducts and poles, supporting the take-up of higher-speed services and preparing for the retirement of the copper network, alongside our broader engagement with a range of stakeholders including investors.
- **Effective Openreach reform.** We will continue to monitor how the legal separation of Openreach from BT in 2017 is working in practice. We will publish our next annual monitoring report on progress compiled during 2020, and will reflect on the appropriate timing to conduct a broader strategic review on whether the arrangements are delivering the outcomes intended by the Strategic Review of Digital Communications.⁸

⁸ [Initial conclusions from the Strategic Review of Digital Communications. Ofcom, 25 February 2016.](#)

Ofcom's spectrum work

Radio spectrum connects our digital world. Spectrum is a finite resource but used wisely it can continue to transform the way we live and work – helping to make us more productive, reducing our environmental impact and benefiting industries across the economy. Ofcom has the job of ensuring this vital resource is used in the best interests of everyone in the UK.

Our work supports a wide range of organisations and individuals in enabling a wide variety of uses, from wireless microphones and cameras for television and theatre productions, to business radio solutions offering connectivity to businesses, to satellite connectivity for providing satellite TV, broadband and GPS services. Access to spectrum is also critical for various public services from emergency services, police and fire, to maritime and aeronautical services, such as radars supporting airports across the country.

Our major spectrum-related projects - such as our 700 MHz/3.6-3.8GHz band auction - are also crucial to supporting other aspects of Ofcom's work, notably in the mobile, and TV and radio broadcasting sectors ensuring consumers can continue to benefit from the services they value. Given the rapidly evolving demand for wireless connectivity and therefore for spectrum, we look to put innovation at the heart of our support for the sectors that we work with, enabling both growth in existing sectors and innovation coming from new uses of wireless. Our ongoing work in this area includes:

- **Authorising spectrum and assuring correct and compliant use.** We provide advice and assistance to a range of spectrum users. This includes carrying out detailed technical analysis and real-world measurements to optimise the use and sharing of spectrum. We look to constantly improve our models and our authorisation approach to better understand the potential for different users to share the same spectrum, helping to meet growing demand from new and existing users. We license the use of spectrum and monitor for non-compliant use. We investigate reports of harmful radio interference, resolving where possible and enforcing where necessary. We carry out market surveillance to prevent the sale or use of non-compliant equipment.
- **Analysing and releasing information on spectrum use.** We release spectrum information in an open format so that it is easier to understand how spectrum is used. We also analyse the use of spectrum to inform policy.
- **Managing spectrum and planning for future requirements.** As part of our work to ensure the efficient use of spectrum we consider the evolving needs of existing users and the future demand for innovative wireless services. This work informs our spectrum roadmap and our authorisation approaches.
- **Enabling wireless innovation across a variety of industry sectors.** We support digital transformation in industry, from understanding the needs of the energy and transport sectors, to enabling the use of drones for logistics. We work with different industry sectors, to understand their business requirements and the potential for wireless connectivity to meet their needs. Our objective is to make sure different businesses and organisations can access the spectrum they need, where and when they need it.



Getting everyone connected

We are focused on addressing the UK's digital divide, improving access to services in the hardest-to-reach locations, to make sure everyone in the UK has the connectivity they need.

3.9 Being connected has never been more important. The vast majority of UK homes can now access decent broadband (at least 10Mbit/s download and 1Mbit/s upload speed). The broadband

96% of UK premises can now access superfast broadband - a total of **28 million premises**



Universal Service Obligation (USO), which gives the legal right to request a decent connection, will help some of the 190,000 homes currently without access to decent broadband.⁹ However, the very high costs of building to the most remote locations across the UK might mean the broadband USO will not cater for them so we are considering how access to services in the hardest to reach areas can be improved.

3.10 In March 2020, the UK Government announced funding for the Shared Rural Network (SRN) being built by the four mobile network operators (EE, O2, Three and Vodafone). The SRN will improve mobile coverage across the UK, particularly in rural areas.¹⁰ We will be reviewing the progress of the operators to provide transparency on the delivery of their commitments.

3.11 Getting everyone connected doesn't just relate to the broadband we use at home and the mobile services used across the country. It also includes how we communicate and connect with each other using postal services. The decline in letter volumes has accelerated over the past two years, falling by 3.9% from 10.4 billion in 2018/19 to 10 billion in 2019/20. In contrast, the growth in online commerce has benefited parcel volumes which increased by 8% to 2.8 billion items in 2019/20. The coronavirus pandemic has further fuelled the demand for parcel delivery with Royal Mail reporting a 31% increase in volumes in the first

⁹ https://www.ofcom.org.uk/data/assets/pdf_file/0017/202571/connected-nations-summer-update-2020.pdf

Provided the cost of a connection is less than £3,400, it will be provided without additional contributions from the customer.

¹⁰ <https://www.gov.uk/guidance/building-digital-uk>

six months of 2020/21 and many parcel operators expanding capacity in their networks.¹¹ We will ensure our regulation adapts to changes in the postal market and that the future sustainability of the universal postal service is secured.

3.12 Our key priorities in 2021/22 to further these goals will be:

- **Broadband universal service.** The broadband Universal Service Obligation (USO) was launched last year. We will continue to monitor its delivery by the designated providers (BT and KCOM) and consider any funding claims for the connections that have been built. Alongside this, we will look to understand how people's connectivity needs have evolved and will do so in the future.
- **Addressing the remaining homes without decent broadband.** We will consider how access to broadband services in the hardest-to-reach areas could be improved, focusing on their location and how different technologies could deliver better services at lower cost.
- **Mobile coverage.** We will continue to report on progress made to improve coverage under the Shared Rural Network programme.
- **Progress our review of the future of postal regulation.** During 2019/20 we started work on the future of postal regulation. This work includes a review of the sustainability of the universal service, the efficiency of Royal Mail's network, the effectiveness of competition in the letters and parcels market, and the extent to which customers benefit from adequate protections in the market.

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

- **Moving to digital lines.** As voice calls are increasingly carried via broadband, we will continue working with communications providers to support the migration from analogue to digital lines. Throughout this process we will work to make sure people are protected and that providers have resilient solutions to consumers' concerns.
- **The future of 2G/3G networks.** We will continue working with industry and the Government to ensure appropriate coordination to protect customers and minimise disruption during the process of 2G/3G switch-off.
- **Allocating and managing telephone numbers.** We will continue to ensure the efficient use of telephone numbers which we allocate to telephony providers.
- **Legacy universal services.** We will continue our review of legacy universal service obligations, including public call boxes, itemised billing and printed directories, with a view to publishing a statement in the winter.
- **Quality of postal services.** We will continue to scrutinise Royal Mail's quality of service as part of our ongoing monitoring programme. We will focus on the recovery of service levels from the effects of the pandemic.

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

¹¹ [Review of postal users' needs: 2020 report \(ofcom.org.uk\)](https://www.ofcom.gov.uk/consult/condocs/2020/20200101/20200101.pdf)



Fairness for customers

We want all UK communications customers to be treated fairly, with people able to make informed choices, switch easily and get a fair deal for their broadband, phone and TV services.

3.15 Fairness for customers of communications services continues to be a priority for us. It is vital that people and businesses are treated fairly by their providers and can trust that markets operate with integrity.



While many households (81%) have not experienced affordability issues with communications services, on average, **19%** have reported at least one issue.

3.16 We have taken action to make sure customers are treated fairly and we continue to challenge companies to do more. The UK's biggest broadband, mobile, pay-TV and home phone providers have signed up to Ofcom's Fairness for Customers commitments.¹² The pandemic has highlighted just how important communications companies are for the UK, and its long-term effects are likely to create significant financial uncertainty for many businesses, families and individuals. We are conscious of the ongoing need for affordable services, particularly for those in vulnerable circumstances, and the importance of phone, broadband and pay-TV companies treating their vulnerable customers fairly.¹³

¹² [Britain's biggest broadband and phone firms to put fairness first - Ofcom](#)

¹³ <https://www.ofcom.org.uk/about-ofcom/latest/media/media-releases/2020/vulnerable-customers-must-be-treated-fairly>

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

- **Affordability.** We will continue to monitor where households have difficulty paying for communications services, particularly in relation to broadband. We will consider whether any measures, for example social tariffs, are needed to support consumers who are financially vulnerable.
- **Simpler switching.** We will conclude our proposals to introduce a new, simpler switching process for all broadband customers regardless of the network or technology they are switching to or from. We will work with industry on the implementation of this process.
- **Helping customers get better deals.** We will review the effectiveness of end-of-contact and annual best tariff notifications in helping customers to engage and get better deals. We will hold mobile and broadband providers to account to deliver on the voluntary pricing commitments they have made and review their impact as part of our package of measures to ensure fairness for customers.
- **Making data work for consumers.** We will conclude our initial thinking on Open Communications, which will enable people to share their data safely with third parties to help them to navigate the market and get a better deal. We will work with the Government as it develops legislation to enable smart data initiatives across sectors.

3.18 In addition to the specific work we will undertake this year, we also have ongoing programmes that support our work in this area.

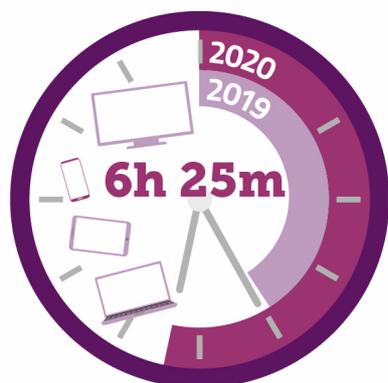
- **Ensuring that the voice of the consumer is heard.** We will make sure our policies and actions are informed by insights and data from consumers. We will gain this intelligence through the work of our consumer contact team and through a wide range of organisations such as consumer groups.
- **Comparing service quality.** We will report on the comparative level of customer service for providers in the telecoms sector and will also report quarterly on complaints we receive about different providers.
- **Supporting consumers in communications markets.** We will monitor schemes which we approve or oversee, such as alternative dispute resolution bodies, automatic compensation and the broadband speeds code of practice.
- **Participation and vulnerability.** We will support customers in vulnerable circumstances, including working with industry to improve the consistency of data recording and monitoring the support providers have in place.
- **Nuisance calls and scams.** We will continue our work with communications providers to disrupt and prevent nuisance calls and scams. We will also explore further actions that we and communications providers can take to help tackle scam calls and texts. We will work alongside other enforcement agencies, such as the Information Commissioner's Office (ICO), consumer interest bodies and international regulators, to share intelligence and best practice.



Supporting and developing UK broadcasting

We will support a healthy and vibrant broadcasting sector which serves all UK audiences. We will achieve this by helping UK media to evolve to meet the changing needs of viewers and listeners.

- 3.19 The pandemic has highlighted the importance of UK broadcasting and content which is valued by audiences and reflects the lives of people in the UK. However, the past year has brought significant financial uncertainty for the TV and radio industry, with many broadcasters experiencing falls in advertising revenue. We published information for broadcasters throughout the year, keeping them up to date with guidance on our regulatory approach. We will continue to work with broadcasters to understand any challenges they face as a result of the pandemic, and we remain committed to fulfilling our regulatory role with pragmatism and flexibility.



In April 2020 the average time spent watching content increased to **6 hours 25 minutes** per person per day - an hour and a half more than 2019.

- 3.20 The exceptional circumstances of the past year have affected our media habits and accelerated the growth in viewing of online video. Take-up of subscription video-on-demand (SVoD) services, such as Netflix and Disney+, increased from 53% of UK households in Q1 2020 to 60% in Q3 2020. While the majority of UK viewing is still on live broadcast TV, this varies significantly by demographic, with 16- to 34-year-olds spending less than a quarter of their video-watching time on live TV.¹⁴ The overall viewing of broadcast television increased during the first UK lockdown, peaking in April 2020 with an average of just over three and a half hours per person – the highest April viewing seen in the past five years. These changes in viewer behaviour along with new technology and fast-changing markets, provide the backdrop to our work.

¹⁴ <https://www.ofcom.org.uk/research-and-data/tv-radio-and-on-demand/media-nations-reports/media-nations-2020>

3.21 We will continue to support the UK's vibrant broadcasting sector to deliver benefits to all UK audiences and our work in this area includes:

- **Small Screen: Big Debate.** The public service broadcasters¹⁵ (PSBs) are central to the UK creative economy. They are a trusted source of news and current affairs and produce a wide range of original UK content. We are reviewing the future of public service broadcasting, considering changing audience habits and fast-developing markets. Our 'Small Screen: Big Debate' review builds on our assessment of PSB performance over 2014-2018, by considering what audiences will want from public service media over the next five to ten years, how it might be delivered, and how it may be sustained.¹⁶ We have engaged widely, including through a programme of audience research, and consultation following our conference in October 2020. We will publish our recommendations to the Government this summer.
- **Diversity in broadcasting.** Increased diversity in television and radio is an important priority for Ofcom. We expect broadcasters to address critical areas of under-representation, particularly in senior positions where there is an ongoing lack of people with disabilities and those from minority ethnic backgrounds.¹⁷ We want broadcasters to gain a better understanding of socio-economic and geographic diversity and expect those in leadership roles to take accountability for delivering real change. We will support these efforts through continued monitoring and widespread engagement.
- **Media ownership rules.** We are required to review the rules for media ownership for television, radio and newspapers every three years, and report to the Secretary of State with our findings. The rules make sure people can access a wide range of viewpoints and are an important part of how our democracy functions. In this review we will take account of the substantial changes that have occurred in the media landscape, the new players in the market and the ways in which we now acquire and engage with news content.

3.22 We will also continue to report on the BBC's performance to make sure it is delivering its mission and public purposes, and that it is meeting the requirements set out in the BBC operating licence and operating framework. When appropriate, we will also carry out competition assessments on the BBC's plans to develop its services. Specific projects for this coming year include:

¹⁵ BBC, ITV and STV, Channel 4, Channel 5 and S4C.

¹⁶ https://www.ofcom.org.uk/data/assets/pdf_file/0013/192100/psb-five-year-review.pdf

¹⁷ https://www.ofcom.org.uk/data/assets/pdf_file/0022/207229/2019-20-report-diversity-equal-opportunities-tv-and-radio.pdf

- **Continuing our review of the interaction between BBC Studios and the BBC Public Service.** We are reviewing the evolution of the BBC’s commercial subsidiary, BBC Studios, including how it has implemented our trading and separation requirements. Reports on the findings will be published in the summer.
- **Beginning our first periodic review of the BBC, ahead of the Government’s mid-term review of the BBC Charter.** We are required to carry out at least two periodic reviews during the charter period, the first of which must be published in sufficient time to inform the Government’s mid-term review. We must assess the extent to which the BBC is fulfilling its mission and promoting each of its public purposes. We will identify themes and issues for the future regulation of the BBC and will reflect on future strategic challenges.
- Considering how the BBC’s operating licence should evolve to reflect changing audience habits and expectations in a digital world. The BBC’s current operating licence includes a range of requirements across its public services, the majority of which relate to linear, broadcast services such as BBC One or Radio 1. As audiences increasingly watch and listen to content online, via BBC iPlayer or other streaming services, we will consider how the operating licence should evolve to reflect this.

3.23 We will also continue our ongoing work to secure content quality and standards for audiences. This work includes:

- **Setting and enforcing content standards.** Ofcom is the post-transmission regulator for content standards on TV and radio broadcast channels, protecting consumers from potentially harmful and offensive content, while taking full account of freedom of expression. Our rules for TV and radio channels are set out in the Broadcasting Code,¹⁸ and we are also the content regulator for video-on-demand services in the UK. This work has been critical this year, notably in helping to protect audiences from potentially harmful content about the pandemic. We will continue to take robust enforcement action against services that broadcast incitement to crime and hate speech. We make sure the BBC’s TV channels, radio stations and BBC iPlayer comply with the Broadcasting Code. We also have an oversight role in relation to the content of BBC websites.¹⁹ We consider BBC-related complaints as part of the ‘BBC-first’ process where a complaint can be brought to Ofcom if the complainant is not satisfied with its resolution by the BBC.
- **Licensing TV and radio broadcast services.** We will continue to issue, manage and maintain licences for all national and local commercial TV, and radio services.
- **Monitoring how commercially funded, public service broadcasters fulfil their remits.** We will publish our response to Channel 4 Corporation’s delivery of its media content duties, and plans for the following year, as set out in its statement of media content policy. We will also begin the relicensing process for Channel 3 and Channel 5,

¹⁸ <https://www.ofcom.org.uk/tv-radio-and-on-demand/broadcast-codes/broadcast-code>

¹⁹ Unlike our role regulating the standards of BBC broadcasting and on-demand programme services, Ofcom has no enforcement powers for BBC online material. Rather, [our role](#) is to consider and give an opinion on whether the BBC has observed the relevant editorial guidelines in its online material (e.g. online text articles).

including a report to the Secretary of State by June 2022. Renewal of the Channel 4 licence will run in parallel to this.

- **Accessibility of content to disabled people.** We will continue to monitor the accessibility of broadcast and on-demand programme services to people with sight and/or hearing impairment. We will enforce requirements for broadcast access services and work with the Government to introduce new accessibility requirements for on-demand services.
- **Spectrum licensing for broadcast services.** We will deliver more small-scale DAB, analogue community and commercial radio coverage improvements, restricted service licences, and new licences for existing Digital Terrestrial TV (DTT) multiplexes (pending Government consultation and legislation).



Preparing to regulate online harms

In an increasingly digital world where more and more aspects of our life rely on the internet, we want people in the UK to be able to go online safely and platforms to take greater responsibility for protecting internet users.

3.24 People are increasingly spending more time online and using online services for an ever-growing range of purposes. The average time spent online on smartphones, tablets and computers grew by 17 minutes in 2019, with UK adults spending three



Only **19%** of adults reported concerns to any site/app, in contrast to, **29%** of 12 to 15s

and a half hours online on them each day. The pandemic has accelerated this trend, driving adults to spend more than four hours online each day. Online services are becoming increasingly important sources of news, with almost half of online adults using social media as a news source in 2019 and 78% of online adults using BBC services for news specifically about the coronavirus pandemic in March 2020.²⁰ The importance of being online during this time was demonstrated further by the growth in reach of education, health and government sites as the country entered lockdown.

3.25 While online services bring many benefits, people also continue to express high levels of concern about going online. Eighty one percent of 12- to 15-year-olds and 62% of adults say they have had a potentially harmful experience online in the past year, with 12- to 15-year-olds more likely than adults to say that they have experienced potential harms online.²¹

3.26 The UK Government has given Ofcom new duties as the regulator for UK-established video-sharing platforms (VSPs) through the transposition of the Europe-wide Audiovisual Media Services Directive. VSPs are a type of online video service where users can upload and share videos with members of the public, such as YouTube and TikTok. Ofcom will not be responsible for regulating all VSPs as our duties apply only to services established in the UK. Under the new regulations, which came into force on 1 November 2020, VSPs must

²⁰ <https://www.ofcom.org.uk/research-and-data/tv-radio-and-on-demand/news-media/coronavirus-news-consumption-attitudes-behaviour>

²¹ <https://www.ofcom.org.uk/research-and-data/internet-and-on-demand-research/online-nation>

have appropriate measures in place to protect children from potentially harmful content and all users from criminal content and incitement to hatred and violence. VSPs will also need to make sure certain advertising standards are met.

- **Video-sharing platforms regulation.** On 10 March 2021 we issued scope and jurisdiction guidance to help providers self-assess whether they need to notify to Ofcom as a VSP under the statutory rules from April 2021. We have also recently consulted on draft guidance for VSP providers on the measures they should take to protect users from harmful material, and will soon be consulting on proposals for a co-regulatory relationship with the Advertising Standards Authority (ASA) for VSP advertising. We will issue final versions of the guidance later this year.

- 3.27 In addition, the Government's full response to the Online Harms White Paper set out its intention for Ofcom to be responsible for regulating online harms. We welcome this important role and share the Government's ambition to improve online safety and hold platforms to account. As draft legislation is introduced to, and scrutinised by Parliament, we will continue to provide expert and technical advice to support the legislative process. Later this year, we will set out further thinking on how we would carry out our proposed new online safety responsibilities if Parliament passes the necessary legislation.
- 3.28 We recognise that our online safety role is likely to be distinct from some of the regimes we already operate, focusing on holding online platforms to account for their systems and processes, as opposed to adjudicating on individual pieces of content. However, through our existing duties we have developed a strong track record in a number of areas relevant to the online safety regime. This includes the protection of audiences from harm while also upholding freedom of expression and taking into account the importance of technological innovation.
- 3.29 Our work regulating VSPs will provide a foundation on which to build our existing skills and expertise, ahead of the broader online safety laws coming into effect. Ofcom will take a proportionate approach to the regime for UK-established VSPs and will support services transitioning to the broader online safety regime once it is in place.
- 3.30 Given our new online duties, we are committed to deepening our understanding of the wider online ecosystem and sharing our knowledge with consumers, industry and governments. Our investment in this area is discussed below under 'Strengthening Ofcom for the future' alongside our 'Developing strong partnerships' theme.

3.31 Over the next 12 months we will focus our preparatory work for the proposed new online safety regime on five areas:

- **Supporting the legislative process.** We will provide the UK Government and Parliament with technical input and specialist regulatory advice to inform and support the delivery of a workable and effective statutory framework for online safety.
- **Developing our regulatory approach.** This will involve research and analysis to identify and assess options for implementing our proposed new responsibilities, building on our early experiences of the new VSP regime. This will also inform our input to the legislative process. We will test key elements of our approach with interested organisations and explore opportunities to build partnerships, recognising that our regulatory approach will be shaped by the outcomes of the legislative process, and our own formal consultations in due course.
- **Building public awareness of our proposed future role.** We will communicate our approach to developing the online safety regime during the legislative process, engaging extensively with parliamentarians, industry, civil society, expert and representative bodies and the public.
- **Setting up our operation.** We will train and recruit staff with the skills needed to fulfil our new VSP duties and make sure we have the capacity and expertise required to prepare for and deliver the proposed online safety regime. We will develop internal governance, communications and resource management structures to oversee this expansion. We will continue to assess the resource and cost implications of our proposed role as online harms regulator.
- **Investing in technology, data and sector knowledge and capability.** We will increase our programme of research into the behaviours and experiences of internet users, the dynamics and incentives of online platforms, and the tools and technologies that can impact the safety of internet users. We will develop our physical and information management infrastructure, online technology strategy and data and information technology roadmap.

3.32 We will continue work to deepen our understanding of online harms through a range of work:

- **Our Making Sense of Media programme.** Improving media literacy is central to supporting consumers online and is a key pillar of both the VSPs and online safety regimes. This programme provides insights on the needs, behaviours and attitudes of people online, engaging a range of stakeholders in how to improve people's media literacy.
- **Stepping up our collaboration with other regulators.** As discussed under the 'Developing strong partnerships' theme, we are making a step change in our joint working through the Digital Regulators Cooperation Forum and strengthening our collaboration with regulators around the world who are also working to address online harms.
- **Researching online harms.** We will explore the potential to use existing and new quantitative research techniques to assess the prevalence and sources of online harms,

as well as the effectiveness of measures taken to protect users. We will explore a range of analytical tools, including the analysis of data and information provided by online services, as well as conducting consumer research (including behavioural insights). Our other research initiatives on online markets and technologies will further our understanding of how online harms can be mitigated.

- **Online business models.** Understanding online business models, competitive dynamics and how they interact with online harms will be key to future online regulation as well as our work on VSP regulation. Following the advice from the Competition and Markets Authority (CMA) led Digital Markets Taskforce, we will continue to engage with the Government as it considers a pro-competition regime for digital markets and establishes a Digital Markets Unit within the CMA.

Underpinning wider work across the sectors we regulate

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

- **Market research and intelligence.** All our work is underpinned by our understanding of the markets we regulate. We research communications markets and consumer preferences and behaviour to provide an up-to-date, thorough understanding of people and businesses in the markets we regulate. We have adopted new, innovative methods of research through our VSP panel and our behavioural insights programme. We combine this research with data collected directly from industry and, through publications and interactive reports, we make our insights available and accessible to a wider audience. This includes our three main publications: Connected Nations, Media Nations and Online Nation.
- **The Information Registry.** Established in June 2020, the Information Registry supports our vital information-gathering activities by coordinating formal information requests and working with stakeholders to provide clarity on the timing of our planned requests. We will continue to develop the Information Registry to embed and improve ways of working which deliver tangible efficiency improvements to our information-gathering practices, reducing burdens on companies that we seek information from where possible.
- **Enforcement.** Where appropriate, we will use our powers to pursue enforcement cases which support and promote our objectives, and which help foster a strong culture of compliance across all our sectors, ensuring that consumers are protected from harmful practices.
- **Innovation.** We want to foster an environment where innovation flourishes, both in the sectors we regulate and within Ofcom. To achieve this, we will develop a deep understanding of innovation in our sectors and facilitate greater innovation in the markets we regulate and beyond. For example, in partnership with Digital Catapult, we will launch the SmartRAN Open Network Interoperability Centre (SONIC) where existing and emerging suppliers of open network equipment will be able to test and demonstrate interoperability ahead of integration into operator networks. We will also establish a behavioural hub to bring together specialists from across Ofcom to deepen our understanding of how people make decisions.
- **Sustainability and climate change.** We will continue to analyse the sustainability of our industries, including how they affect the environment, how technologies can help other sectors reduce their carbon footprint, and what actions could help achieve the UK's future net-zero carbon target. We will consider what role Ofcom could have in addressing sustainability issues within communications sectors and share our findings.
- **Economic and technology papers.** Last year we launched a series of economics discussion papers.²² The purpose of the series is to encourage debate on all aspects of media and communications regulation and to create rigorous evidence to support our decision-making. We are also publishing papers that look at the key issues and trends in the area of technology such as our recent Technology Futures paper.²³ These papers aim to make significant contributions to our knowledge and to generate a wider debate on the themes covered. We will publish more of these papers in the coming year on topics of strategic importance to Ofcom.

- **Evaluating the impact of our work.** Understanding the impact of our regulation on outcomes for consumers is an important aspect of making sure we are delivering for people in the UK. We will assess the impact of our work and, through our programme of ex-post evaluation, we will publish an in-depth review of our non-geographic numbering policy.

3.33 In addition to the work related to the five themes set out above, we will also take steps to make sure we are well placed to carry out our duties both now and in the future. This work is set out below.

²² [Economics discussion papers - Ofcom](#)

²³ https://www.ofcom.org.uk/_data/assets/pdf_file/0011/211115/report-emerging-technologies.pdf



Strengthening Ofcom for the future

We will strengthen our skills and develop innovative working practices to be the most effective and efficient organisation we can be. We will develop our representation across the UK and ensure we have a diverse workforce that serves everyone in the UK.

- 3.34 With increasing use of online services, Ofcom faces the implications of new technology and services on the sectors we regulate, as well as a growing remit in telecoms security and online safety. To meet these challenges, Ofcom will need to develop as an organisation.
- 3.35 Over the past few years we have increased our expertise in areas such as data analytics and digital technology. With our new responsibilities we will be making significant new investments to increase our skills and capabilities in these areas as well as in emerging technologies, digital markets, and the commercial drivers of online platforms. We will also make sure that our workforce reflects people and perspectives from across the whole of the UK.
- **Bring about a step change in our skills and capabilities in digital markets, online and emerging technologies and data analytics.** In the coming year we will significantly increase our digital skills and capabilities with a focus on external recruitment of data and technology experts, starting with the recruitment of a new Chief Technology Officer. We will introduce a bigger programme of secondments and partnerships, bring in training programmes for data and technology professions as well as new tools and platforms.
 - **Strengthen our understanding of the commercial priorities and incentives of the businesses and markets we regulate now and in the future.** As our sectors grow and develop we will ensure we have a deep commercial understanding of the markets we regulate. We will focus on these capabilities by recruiting colleagues with commercial experience, using more secondments, and significantly investing in our programme of commercial and consumer research.
 - **North of England hub.** This year we will be opening a new hub in Manchester, with a particular focus on online safety, the tech sector and network security. We will also be looking to grow our presence in our offices in Belfast, Cardiff and Edinburgh to ensure that we are able to attract the best talent the UK has to offer and that we are representative of all parts of the UK.
 - **Our diversity and inclusion programme will drive more innovative, creative and agile thinking.** We will be most effective at working in the interests of people across the UK if Ofcom's workforce is representative of all of the UK's nations, regions and communities. As an organisation, it is essential that we have a broad range of

backgrounds and experiences, reflecting those of people across the UK. In July we will report our progress against our 2015-2020 diversity targets in our annual report and accounts, and share the initial steps we have made towards our new 2021-2026 targets and our plans for the year ahead.



Developing new partnerships

As our remit develops, we will exchange knowledge and insight by collaborating with a wide range of organisations both in the UK and internationally to ensure the best outcomes for people in the UK.

- 3.36 We will continue to build relationships with regulators, businesses, expert bodies and governments in the UK and around the world so that we can continue to learn and exchange best practice. Through these partnerships and relationships we will seek to improve our understanding of our sectors and the ways in which we can serve people in the UK.
- 3.37 We support the Government's desire for continued effective regulation, delivered through close collaboration with domestic, European and other international partners. In the UK this will include a range of work.
- **Engaging with our media literacy partners.** Working with our Making Sense of Media advisory panel and network we will seek to understand consumer experiences, share best practice, and evaluate media literacy activities.
 - **A step change in joint working with other digital regulators through the Digital Regulation Cooperation Forum (DRCF).** Ofcom, the CMA and the ICO formed the DRCF in July 2020 to ensure a greater level of cooperation, given the unique challenges posed by the regulation of online platforms. On 10 March the DRCF published its workplan for 2021/22, setting out a roadmap for how we will greatly increase the scope and scale of our cooperation.²⁴ From 1 April, the Financial Conduct Authority (FCA) will join the DRCF as a full member.
 - **UK Regulators Network (UKRN).** We work with other UK regulators to address common challenges across different sectors and to share best practice as a member of the UKRN. We will continue to contribute to joint policy work with the UKRN to improve outcomes for vulnerable consumers.
 - **Telecoms security framework.** We will continue our close working relationship with the National Cyber Security Centre in the area of network security.
 - **SONIC testbed.** We will work with Digital Catapult to establish the SONIC (SmartRAN Open Network Interoperability Centre) testbed to test and facilitate open interoperability in UK networks, as a step to diversification of equipment supply chains in line with the Government's 5G Supply Chain Diversification Strategy.

²⁴ <https://www.gov.uk/government/publications/digital-regulation-cooperation-forum-workplan-202122/digital-regulation-cooperation-forum-plan-of-work-for-2021-to-2022#the-2021-22-drcf-workplan>

- 3.38 We will also continue to invest in our international relationships across the sectors we regulate. Our work in this area includes:
- **Emerging and disruptive technologies.** Through working with technologists in academia and industry internationally, we will continue to build on our understanding of the impact of technological innovation in our sectors in areas such as artificial intelligence (AI), quantum communications, new computing architectures and new materials.
 - **Exchanging experiences around online regulation.** We will continue to explore potential partnerships internationally, and to exchange experiences and best practices with other regulators (including those from Australia and Ireland) who are considering the challenges of online regulation, particularly related to harmful content.
- 3.39 Throughout the EU-exit process, we have provided the Government with independent technical advice in relation to the sectors we regulate. We will continue to provide similar advice to the Government to support its discussions on the UK's future relationship with the EU, and its work on other trade relationships.

4. Delivering good outcomes for consumers across the UK

4.1 Ofcom’s principal duty in carrying out its functions is ‘to further the interests of citizens in relation to communications matters and the interests of consumers in relevant markets, where appropriate by promoting competition’. It is important that we articulate the consumer outcomes that we would like to achieve in our programme of work. Doing this also helps us to assess how well we have delivered on our objectives, and where more can be done.

Consumer outcomes measures

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

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

Strategic priorities	Measures we want to see/monitor
Investment in strong, secure networks	<ul style="list-style-type: none"> • Significant 5G rollout and mobile investment needed to deliver the experience consumers expect in the mid to long term • High levels of customer satisfaction with service • Increased number of homes with more than one gigabit-capable network available • Significant investment in gigabit-capable and full-fibre networks <p>We will:</p> <ul style="list-style-type: none"> • Identify gaps in network resilience standards and best practice and propose solutions • Monitor compliance with the telecoms security framework
Getting everyone connected	<ul style="list-style-type: none"> • A reduction in the number of homes unable to get 10Mbit/s broadband • Increases in the proportion of the UK that receives good quality mobile coverage from all mobile network operators <p>We will monitor:</p> <ul style="list-style-type: none"> • Financial sustainability of the universal postal service • Royal Mail’s quality of service
Fairness for customers	<ul style="list-style-type: none"> • High levels of customer satisfaction with value for money • High levels of satisfaction with how complaints are handled

	<p>We will monitor:</p> <ul style="list-style-type: none"> • The proportion of out-of-contract customers and how much they pay compared to in-contract customers • The proportion of people who have difficulties being able to afford communications services
Supporting and developing UK broadcasting	<ul style="list-style-type: none"> • Continued investment in content by PSBs including national and regional investment • High audience perceptions of the quality of TV • High levels of PSB reach and viewing • High levels of audience protection due to content standards • Improved representation and inclusion of diverse groups within the TV and radio industry
Preparing to regulate online harms	<p>We will monitor:</p> <ul style="list-style-type: none"> • Measures implemented by UK-established VSPs to protect users • Levels of consumer awareness of online tools and their use to protect consumers from harm online

Our work across the UK

- 4.4 Ofcom regulates for the whole of the UK. Our statutory national advisory committees advise us about the interests and opinions, in relation to communications matters, of people living in each of the four nations of the UK. These committees provide advice to our policy teams and are an important stage in our policy formulation process. The views of audiences across the UK are also presented on Ofcom's Content Board, which has experienced members representing each of the UK nations. There is also a statutory requirement for each of the UK nations to have its own representation on the Communications Consumer Panel, which pays particular attention to the needs of older and disabled people, people in rural areas and those on low incomes.
- 4.5 Ofcom has now also entered into formal memoranda of understanding (MoU) with the Department for Digital, Culture, Media and Sport (DCMS) and the governments and legislatures in Scotland and Wales, and is seeking to do the same in Northern Ireland. These MoU commit Ofcom to consulting on our draft plan of work and set out the process for Welsh and Scottish ministers to each appoint members to the Ofcom Board, among other things.
- 4.6 We review where our staff are located so that, as a regulator, we are representative of the UK. In the past few years we have moved over 100 roles outside of London and the south-east of England. We will continue this trend in the coming year as we look to grow our presence in our offices in Belfast, Cardiff and Edinburgh and open our new hub in Manchester, with a particular focus on online safety, the tech sector and network security.
- 4.7 Bob Downes and David Jones have been appointed and serve as the Ofcom Board members for Scotland and Wales respectively; Bob Downes is also acting as interim

member for Northern Ireland. These board members have direct input into Ofcom's priorities and work, ensuring that we can deliver our goals across the UK.

Common challenges

- 4.8 Providing fixed broadband, mobile, and postal services that meet the needs of people and businesses in rural and remote areas presents particular challenges. These areas fall disproportionately within Northern Ireland, Scotland and Wales and some English regions. National, regional and local broadcasting services should meet the needs, and reflect the diversity, of audiences across all UK regions and nations. We are currently in a period of change that will affect all UK nations, with the pandemic, developments around the future of online regulation and a continuing period of change around the UK's relationship with the EU and beyond.
- 4.9 In 2021/22, as outlined elsewhere in this document, we will publish a number of reports.
- Our Connected Nations report, and updates, on broadband and mobile coverage and speeds, including variations between rural and urban consumers and in different areas of the UK. We will make this information available to consumers to help them make informed choices.
 - A statement on our proposals as part of Small Screen: Big Debate, our fourth review of public service broadcasting, taking into account the different languages and national PSB landscapes – notably the PSBs which address specific UK nations.
 - Annual reports on media (Media Nations) and on the BBC, including assessing the BBC's performance against its operating licence. Each of these reports addresses issues about delivery to each of the UK's nations.
 - We will promote diversity and equality of opportunity in broadcasting by publishing a report on the TV and radio industries and monitor broadcasters' progress on equality of opportunity, diversity and inclusion in employment.
 - We will also examine how we can help the UK Government and devolved Governments to achieve their relevant net-zero emission targets. We have in place ongoing work to reduce our own carbon footprint since 2007, and we will explore how we can reduce our footprint further, while challenging industry to play its part too.

Scotland

- 4.10 In line with our MoU obligations, we will work closely with the Scottish Government, Committees and Members of the Scottish Parliament as well as the Office of the Secretary of State for Scotland in delivering on our 2021/22 work programme.
- 4.11 We will provide technical and regulatory advice, as well as relevant data (where appropriate), to help the Scottish Government to deliver its key telecommunications infrastructure projects - such as the 'Reaching 100%' superfast programme and the Scottish 4G mobile infill programme. This includes acting as an observer on important forums in Scotland, including the Shared Rural Network (Scotland) Working Group and the Consumer Network for Scotland. We will also work with the Scottish Government on

aspects of its broader work programme, including its Infrastructure Investment Plan, Digital Strategy for Scotland and commitment to net-zero carbon emissions by 2045.

- 4.12 We will continue to fulfil our statutory duties as they relate to MG ALBA and work with it as it develops its new vision for Gaelic media in its 5-year strategy, the Lèirsinn 2026.
- 4.13 We will also support our wider stakeholder network in Scotland, maintaining productive working relationships with industry, local authorities and the Third and wider civic sectors in Scotland. Specifically, we will engage with Scotland's tech sector to support VSP regulation and our proposed responsibilities for online safety.

Wales

- 4.14 In line with the MoU, we will continue to work closely with the Welsh Government, Committees and Members of Senedd Cymru as well as the Office of the Secretary of State for Wales, in delivering on our 2021/22 work programme.
- 4.15 We will continue to work closely with the Welsh Government in providing technical and regulatory advice as well as sharing information as appropriate, including raising awareness of the programmes available to improve connectivity in Wales and progressing our work in supporting our proposed responsibilities around online safety regulation.
- 4.16 We will work with the Welsh Language Commissioner to promote the Welsh language, focusing our efforts on those areas that will provide people with most opportunity to use the language and have most impact.

Northern Ireland

- 4.17 We will seek to agree an MoU with the Northern Ireland Executive, the Northern Ireland Assembly and DCMS, mirroring the existing agreements in Scotland and Wales. This will include the appointment of an Ofcom Board member for Northern Ireland.
- 4.18 We will offer regulatory and technical advice to the Northern Ireland Executive and local councils to support full-fibre broadband rollout through publicly funded programmes, and work with industry to encourage further commercial full fibre rollout.
- 4.19 We will engage with mobile companies and local authorities so that Northern Ireland benefits fully from the delivery of 5G services and will provide technical advice to the Shared Rural Network working group and the Northern Ireland Executive's Mobile Action Plan to help ensure increased mobile coverage across Northern Ireland.
- 4.20 Following the UK's exit from the European Union we will continue to 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 in respect of communications services and the interests of people in Northern Ireland.

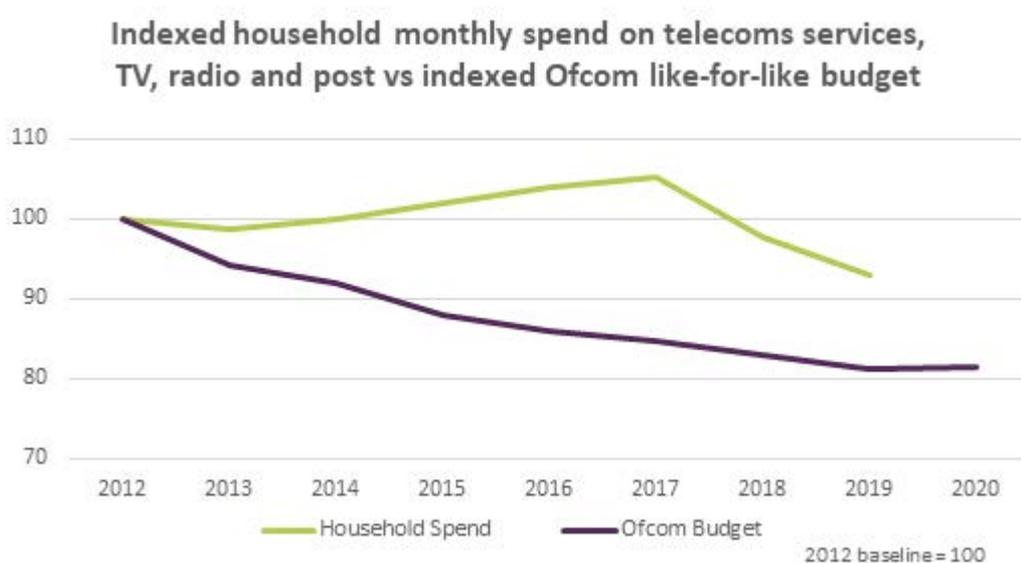
England

- 4.21 Our policy making considers all communities within England. Some ongoing issues will continue to be important, from mobile coverage and the broadband Universal Service Obligation to the diversity of broadcasters on screen and off screen. We will work with the Government, local MPs and local authorities to achieve better outcomes for people across communities within England.
- 4.22 As noted above, this year we will be opening a new hub in Manchester, with a particular focus on online safety, the tech sector and network security to ensure that we are able to attract the best talent the UK has to offer and that we are representative of all parts of the UK.

Ensuring value for money

We will continue to deliver efficiencies and savings

- 4.23 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.
- 4.24 Over this period, on a like-for-like basis, our budget has remained flat in nominal terms and has reduced by 8% in real terms, only adjusted for additional duties relating to the universal broadband service, cybersecurity, the BBC and VSP responsibilities. Ofcom continues to deliver like-for-like, real-terms budget reductions and will continue to increase efficiency wherever we can.
- 4.25 Over the past decade, the cost of regulation has fallen significantly in real terms. The chart below shows how the Ofcom budget has changed compared to the average household monthly spend on telecoms services, TV, radio and post.



Spending cap for 2021/22

- 4.26 The UK Government sets a spending cap for Ofcom's budget. We have agreed a spending cap of £131.9m with DCMS and Treasury for our existing duties. Additional funding for any further responsibilities including online safety and telecoms security is subject to ongoing discussions. Our costs are recovered from operators in the sectors we regulate and the charges due from each sector will be published alongside this document in our tariff tables. The work plan is reflected in the tariffs we set, and there is no change to the method we have used to calculate these charges.

How we will manage our resources in 2021/22

- 4.27 We continually review how we work to act efficiently and effectively. Where resources are limited, we will make choices guided by our priorities and statutory duties.
- 4.28 Our resources and skills are aimed at delivering our plans and duties through strategic planning and an integrated approach to our budgets and forecasts. We regularly review priorities, capacity and demand to make sure we can meet our objectives. We also maximise savings by using competitive processes to achieve the best price 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.
- 4.29 Improving our offices and equipping our workforce with mobile ICT has allowed a more flexible and agile working environment for our workforce and has reduced our London footprint by 39%, saving over £3m per annum since 2019/20. This allowed us to move rapidly to remote and hybrid working as required as a result of the pandemic.

A1. What we do

- A1.1 Ofcom's purpose is to make communications work for everyone. We regulate fixed-line and mobile telecoms, TV, radio, video-on-demand services, post, and the airwaves used by wireless devices. We help UK businesses and individuals get the best from communications services and protect them from harmful treatment and practices. Where appropriate, we support competition as the basis for delivering good consumer outcomes. We act independently from governments and commercial interests to deliver our duties.
- A1.2 However, we are accountable to Parliament, and to perform our role effectively we need to engage openly and constructively with the UK and devolved Governments. We provide technical advice to governments (for example, our work regarding the implementation of a UK broadband universal service provider) and in some cases, we act as a formal representative of the UK Government (for example, in international negotiations on spectrum).

Our principal duty is to further citizen and consumer interests

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

Our main legal duties guide the direction of our work

- A1.4 Our main legal duties in carrying out our work include securing that:
- the UK has a wide range of electronic communications services;
 - optimal use is made of the radio spectrum;
 - a wide range of high-quality television and radio programmes are provided by a range of different organisations, appealing to a range of tastes and interests;
 - people are protected from harmful or offensive material, unfair treatment and unwarranted invasion of privacy on television and radio;
 - the BBC is held to account on its compliance with appropriate content standards, its performance against its Mission and Public Purposes, and the impact of its activities on fair and effective competition; and
 - the universal service obligation on postal services is secured in the UK.
- A1.5 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

- A1.6 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).
- A1.7 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 2021/2022

Project details	Milestones
<p>Providing information on gigabit-capable / ultrafast broadband. People and businesses need the right information to make informed decisions about the broadband services that are best for them. We will continue to work with industry, the Government and consumer bodies on communicating the benefits of gigabit-capable technologies as they become more widely available.</p>	Ongoing
<p>Copper retirement. We continue to support Openreach’s copper retirement trial in Salisbury and ongoing work to monitor the progress of the regulatory transition between copper and fibre services. We also plan to publish a further consultation on the circumstances in which some premises may be excluded from the definition of a completed ultrafast exchange, which will trigger the removal of certain requirements on Openreach.</p>	Consultation Q3 2021/22
<p>Telecoms regulation in the Hull Area. We will publish our final statement on our findings and any remedies for fixed telecoms services in the Hull Area in Q2 2021/22. This will cover all wholesale voice/broadband and leased-line markets.</p>	Statement Q2 2021/22
<p>Mobile strategy. We will develop a strategy for our approach to the mobile sector that underpins our future regulation and supports the delivery of high-quality connectivity and innovation to meet people’s future needs. We will look at changes taking place within the sector, as well as the impact of changes outside it such as the growing role of the tech giants and the potential for greater fixed-mobile convergence, to assess how the market operates and how it is likely to evolve over the next five to ten years. The review will have two main phases. Phase one will focus on evidence gathering, and will include publication of a discussion document to invite stakeholders’ views. The second phase will build on stakeholder responses to draw initial conclusions and set out any next steps.</p>	Consultation Q3 2021/22 Statement Q1 2022/23
<p>Network security and resilience. We will continue to work with the Government to implement the outcomes of the telecoms supply chain review, issuing guidance, including s105 relating to resilience, for industry and ensuring communication providers adhere to their security obligations and follow relevant guidance. In addition, we will provide technical advice and support to the Government’s 5G Supply Chain Diversification Strategy. We will continue to make sure communications providers and 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, in relation to network resilience and continue the programme of proactive monitoring of resilient design in current network deployments.</p>	Ongoing
<p>Award spectrum bands as they are cleared and released. We intend to issue a consultation during 2021/22 about the award of frequencies in 26 GHz.</p>	Consultation Q3 2021/22

<p>Localised licensing. We will look to implement a fully automated authorisation approach for access to the shared bands and to provide a platform for more efficient access to more spectrum in specific locations in the future. We will update our framework for the TV White Space database.</p>	Ongoing
<p>Annual licence fees (ALF) for bands reaching the end of the initial term. Licences covering 1900 and 2100 MHz will reach the end of the initial period covered by the auction in 2000 and we will therefore be setting the future annual licence fees to apply from January 2022. We will also be setting fees for 412-414 MHz paired with 420-422 MHz when the licence reaches the end of the initial period from October.</p>	Consultation Q1 2021/22
<p>Licensing platform evolution (LPE). This will provide a better online process for our customers and will enable us to continue to deliver an efficient spectrum licensing service into the future. Having carried out the initial design and preparation activity we expect to begin migrating across to this new system starting with our simpler, but highest volume licences during this period.</p>	Ongoing
<p>Electromagnetic fields (EMF) and Health. Following the conclusion of a second consultation, we will implement a requirement to comply with the basic restrictions for general public protection based on the International Commission on Non-Ionising Radiation Protection (ICNIRP) Guidelines to spectrum authorisations above 10 Watts Effective Isotropic Radiated Power- EIRP (such as vary licences and update exemption regulations as necessary). We will continue our programme of measurements close to mobile phone base stations, with an ongoing focus on 5G and enhance these measurements as necessary, implementing a compliance checking regime across appropriate bands and services.</p>	Ongoing
<p>Enabling growing demand for the use of drones. We will explore spectrum and authorisation options to support growing demand for beyond-line-of-sight drone use, which can be used for a range of applications such as delivering medical supplies and monitoring traffic systems. We will work with the Civil Aviation Authority (CAA) to make sure we have a joined-up regulatory framework.</p>	Ongoing
<p>Working with industry on wireless and spectrum. We will further 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 manage the needs of innovative services requiring wireless communication to meet their requirements.</p>	Ongoing
<p>Spectrum management strategy. We will publish a statement on the conclusions of our spectrum management strategy review, on which we consulted in December 2020, and which will set out how we intend to manage spectrum over the next ten years.</p>	Statement Q2 2021/22
<p>Spectrum roadmap. We will develop a strategic spectrum roadmap that reflects market, technology and international developments, to enable innovation and ensure access to spectrum when and where it is needed, including for mobile and 5G. This work will also inform our international position in preparation for the World Radiocommunications Conference (WRC) 2023.</p>	Consultation Q3 2021/22 publication Q4 2021/22

<p>Net neutrality. The net neutrality framework requires providers to treat all internet traffic on their networks equally and not favour certain websites or services. We will be looking at the framework to ensure it continues to best serve citizen and consumer interests. In particular, we will look at supporting innovation to deliver improved outcomes for businesses and consumers, taking account of how both networks and services have developed in recent years.</p>	Ongoing
<p>Improving consumer information on fixed and 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. As part of this we will also continue working with industry with the aim of improving the accuracy and commonality of indoor coverage information Ofcom and the industry provides.</p>	Report Q3 2021/22
<p>Mobile coverage. We will continue to report on progress made to improve coverage under the Shared Rural Network programme, as well as evaluating the single coverage model that mobile network operators (MNOs) are due to develop as part of this programme and undertaking work to check the accuracy of operators' coverage predictions.</p>	Ongoing
<p>Broadband universal service. The broadband Universal Service Obligation (USO) launched last year and we will continue to monitor its delivery by the designated providers (BT and KCOM) and will also need to consider any funding claims for the connections that have been built. Alongside this, we will look to understand how people's connectivity needs have evolved and will do so in the future.</p>	Consultation Q3 2021/22
<p>Addressing the remaining homes without decent broadband. We will consider how access to broadband services in the hardest to reach areas could be improved, focusing on the location of these premises and how different technologies could deliver better services at lower cost.</p>	Ongoing
<p>Migration to voice-over-IP services. We will work with communication providers to help make sure issues raised by their migration to voice-over-IP services, including the potential future switch-off of the public switched telephone network (PSTN), are identified and addressed with the aim of protecting consumers from harm and minimising disruption.</p>	Ongoing
<p>Review of USO legacy services. We will continue our review of legacy universal service obligations, including public call boxes, itemised billing and printed directories.</p>	Statement Q4 2021/22
<p>Home broadband performance measurement. We will publish data on the performance delivered by different services and how they vary. We will look at a number of factors including technology, service provider, package, geography and time of day.</p>	Report Q3 2021/22

<p>2G/3G switch off. We will continue our work exploring the impacts of 2G/3G switch off on all affected parties. We will work with mobile operators to help make sure issues are identified and addressed with the aim of protecting customers from harm and minimising disruption.</p>	Ongoing
<p>Improving indoor mobile coverage. We will improve the regulations controlling mobile phone repeaters to allow greater use while also protecting the mobile networks from interference from illegal equipment.</p>	<p>Consultation Q1 2021/22</p> <p>Statement Q3 2021/22</p>
<p>Monitoring the postal market and Royal Mail's performance. We will continue to monitor the postal sector as part of our statutory duty of securing a universal postal service, having regard to financial sustainability and efficiency. We will publish an update in late 2021.</p>	Report Q3 2021/22
<p>Review of the future regulatory framework for post. During 2020 we started work to assess what the appropriate regulatory framework should be for regulating the postal sector, in light of changes to the market - notably customers' increasing reliance on parcel delivery and the continued decline in letter volumes. Our plan is to put in place a new regime during 2022.</p>	Consultation Q3 2021/22
<p>Implementing new consumer protection measures. In October 2020, we concluded on a package of measures to further protect customers and help make sure they get a fair deal. These measures implement the new customer protections in the European Electronic Communications Code (EECC). We will work with providers during the implementation period.</p>	Ongoing
<p>Evaluation of our non-geographic numbering policy. We will continue to assess the impact of our work as part of our 2021/22 work programme and through our programme of ex-post evaluation we intend to publish an in-depth review of our non-geographic numbering policy.</p>	Report Q1 2021/22
<p>Future of numbering policy review. We will continue our strategic review of the telephone numbering plan to make sure it provides what people understand, want and need from numbers for the coming decade. In particular, we will be considering the future of area codes, 084/087 numbers and we will continue our programme to address anomalies in the use of and charges for calls to 07 numbers.</p>	Statement Q4 2021/22
<p>Number authentication. We will undertake a programme of work to achieve greater trust in caller IDs and support tackling of nuisance and scam calls.</p>	Report Q2 2021/22
<p>Affordability of communications services. We will continue to monitor where households have difficulty paying for communications services, particularly in relation to broadband. We will consider whether any measures are needed to support consumers who are financially vulnerable, and work with the Government to consider the case for these where appropriate.</p>	Report Q1 2021/22

<p>Helping customers get better deals. Since February 2020, broadband, mobile, landline and pay-TV companies have been required to tell customers when their contracts are coming to an end and show them the best deals they have available. Out-of-contract customers will also have to be sent reminders and shown the best deals every year. We will be reviewing how providers have implemented these notifications and their impact on customer behaviour and we expect this to continue into the next performance year. We will also review the impact of the voluntary commitments made by a number of mobile and broadband providers as part of our package of measures to ensure fairness for customers.</p>	<p>Report Q2 2021/22</p>
<p>Participation and vulnerability. We will work to support the needs and interests of those who are disabled, elderly, on low incomes or living in rural areas, as well as those whose circumstances appear to put them in need of special protection. This will include contributing to joint policy work with the UK Regulators Network to improve outcomes for vulnerable consumers.</p>	<p>Ongoing</p>
<p>Open Communications. We will publish an update on the findings of our consultation on Open Communications, which would enable people to share their data with third parties to help them navigate the market and get a better deal. We will work with the Government as it develops legislation to enable smart data initiatives across sectors.</p>	<p>Publication Q1 2021/22</p>
<p>Simpler switching. We will conclude on our proposals to introduce a new simpler switching process for all customers whoever their broadband provider. This is regardless of whether they are moving across different fixed networks (for example, between Virgin Media and a provider using the Openreach network) or between providers that use the same fixed network but connect customers using different technologies.</p>	<p>Statement on Simpler switching and Consultation on changes to General Conditions Q1 2021/22</p> <p>Statement on GC changes Q2 2021/22</p>
<p>Tackling nuisance calls and scams. We will continue our work with communications providers to disrupt and prevent nuisance calls and scams. Our work will also explore further actions Ofcom and communications providers can take to help tackle scam calls and texts. We will work alongside other enforcement agencies, such as the Information Commissioner's Office (ICO), consumer interest bodies and international regulators, to share intelligence and best practice.</p>	<p>Ongoing</p>
<p>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.</p>	<p>Report Q2 2021/22</p>
<p>Comparing service quality. We will publish our annual report looking at the quality of service provided to residential customers by fixed and mobile telecoms providers.</p>	<p>Report Q1 2021/22</p>

<p>Advertising policy and regulation. The Government has consulted on additional restrictions on TV advertising for food and drinks high in fat, salt and sugar (HFSS), including a pre-watershed ban, with a statement expected in due course. If tighter restrictions are introduced, Ofcom and our co-regulators (BCAP and the ASA) would be required to administer this.</p>	Ongoing
<p>Public service broadcasting programme: Small Screen: Big Debate. We will consider the role of public service broadcasting in a fast-changing media landscape, and the ongoing impact of the pandemic, by facilitating the ‘Small Screen: Big Debate’ programme of work with industry, the UK and devolved governments, Parliament, viewers and listeners.</p>	Statement Q2 2021/22
<p>Monitoring diversity and equality of opportunity in broadcasting. We will continue to report on diversity in the UK TV and radio sectors to provide a picture of how well individual broadcasters – and the industry as a whole – are promoting equality of opportunity, diversity and inclusion within their organisations.</p>	Report Q3 2021/22
<p>BBC Studios review. We are reviewing the evolution of BBC Studios, including how it has implemented our trading and separation requirements. We will publish the findings of our review in Q1 21/22.</p>	Report on Findings Q1 2021/22
<p>Competition assessment on BBC Three. The BBC has announced a proposal to re-instate BBC Three as a linear TV channel. As this is a new public service, under the terms of the BBC Charter and Agreement, the BBC must conduct a Public Interest Test (PIT) on the proposal, which will be followed by an initial assessment consultation then a Competition Assessment (BCA) by Ofcom. Our BCA will consider whether the public value identified in the proposal justifies any potential negative impacts on competitor services.</p> <p><i>*note: timings subject to the BBC Public Interest Test</i></p>	Consultation Q1/Q2 2021/22* Consultation Q3 2021/22 Statement Q3/4 2021/22
<p>Monitoring the BBC’s commercial activities. The BBC’s commercial activities are required to earn a commercial rate of return over an appropriate period to ensure public money is not used to finance loss-making commercial activities. We require the BBC to report on the financial performance and target rates of return for each of its commercial subsidiaries and each line of business within its commercial subsidiaries. We will also continue to monitor the BBC’s compliance with our requirements in relation to operational separation and transfer pricing.</p>	Ongoing
<p>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.</p>	Report Q3 2021/22
<p>Review of the BBC Operating Licence. We will consider how we regulate the BBC’s performance through our review of the BBC Operating Licence</p>	Call for Inputs Q2 2021/22 Consultation Q4 2021/22

<p>Periodic Review of the BBC. We are required to carry out a periodic review of the BBC in sufficient time to inform the Government’s mid-charter review. The review must consider the extent to which the BBC is fulfilling its Mission and promoting each of the Public Purposes, and addressing any specific issues or concerns identified by Ofcom. We expect to also reflect on future strategic challenges</p>	Ongoing
<p>Material changes to the BBC’s public service activities. We will continue to monitor the BBC’s public service activities to ensure any material changes have appropriate regulatory scrutiny if required.</p>	Ongoing
<p>Review of media ownership rules. We are required to review the rules for media ownership for television, radio and newspapers every three years, and report to the Secretary of State with our findings. The rules make sure people can access a wide range of viewpoints and are an important part of how our democracy functions. In this review we will be taking account of the substantial changes that have occurred in the media landscape, the new players in the market and the ways in which we now acquire and engage with news content.</p>	Consultation Q1 2021/22
<p>Responding to Channel 4 Corporation’s annual Statement of Media Policy. We will publish our response to Channel 4 Corporation’s delivery of its media content duties and plans for the following year as set out in its statement.</p>	Report Q2 2021/22
<p>On-demand programme services (ODPS) accessibility code. We expect the Government to introduce regulations requiring providers of on-demand programme services to make them accessible to people with sight and/or hearing impairments. We will then consult on and publish a code giving guidance on meeting the requirements. The requirements are likely to involve providing subtitles, audio description and signing alongside programmes.</p>	Consultation Q1 2021/22 Statement Q2 2021/22
<p>Video-sharing platform regulation. The new Audiovisual Media Services Regulations 2020 introduce requirements for UK-established video-sharing platforms (VSPs) to take appropriate measures to protect children from harmful content and to protect the general public from content containing illegal material and incitement to violence or hatred. VSPs also need to ensure certain standards around advertising are met. These regulations came into force on 1 November 2020. We are developing and publicly consulting on regulatory guidance for VSPs, which will be finalised later this year.</p>	Statement Q2 2021/22
<p>Preparing to regulate online harms. The UK Government has confirmed its intention to appoint Ofcom as the regulator for online harms and we are preparing for this planned new role. Later this year, we’ll set out further thinking on how we see the online safety regime working in practice. Our Making Sense of Media programme and our regulation of UK-established VSPs will provide a foundation ahead of the introduction of these broader online safety laws.</p>	Publication Q1 2021/22

<p>Making Sense of Media. We will continue our work to help improve the online skills, knowledge and understanding of UK adults and children by providing research, developing policy around the role of media literacy in online regulation, and driving best practice through collaboration with relevant organisations and industry to build the evidence base.</p>	<p>Publication Q1 2021/22</p> <p>Publication Q3 2021/22</p>
<p>Online markets. Following on from our close working with the CMA-led Digital Markets Taskforce, we will continue to work with the Government as it considers the taskforce's advice on a pro-competition regime for digital markets and works to establish a digital markets unit within the CMA.</p>	<p>Ongoing</p>
<p>Transforming Ofcom's capability in data engineering, science and analytics. We will continue to contribute to data engineering and science initiatives and support colleagues around the organisation to maximise insight and efficiency from data-related activities. In addition to using innovative tools and processes to support policy and operational delivery, we will review emerging technologies and methodologies to make sure we remain at the forefront of understanding in this complex area.</p>	<p>Ongoing</p>
<p>Developing Ofcom's understanding of the technologies used to deliver online services. We are building Ofcom's capabilities in online technologies to support the increased relevance of these to our role in regulating VSPs and, in future, online harms and in the cloudification of telecoms and broadcast networks. We have created a new knowledge management framework to keep abreast of fast-paced developments in this area, commissioned several external research projects to build our knowledge of the key technology areas and built links with the emerging SafetyTech industry. We plan to publish a series of discussion papers exploring the potential implications of key technologies.</p>	<p>Ongoing</p>
<p>Developing Ofcom's understanding of emerging and disruptive technologies and the roles they play in delivering services to consumers and businesses. We are seeking to understand, by working with technologists in academia and industry internationally, the potential impact of technological innovation on the sectors we regulate, including evolutions of known technologies and radical new technologies. These include technologies such as artificial intelligence (AI), quantum communications, new computing architectures and new materials.</p>	<p>Ongoing</p>
<p>Continuing to innovate in data and regulation to help people and businesses. Through our emerging technology programme, and forward-looking work, we will continue to develop a deep understanding of innovation in the sectors we regulate and consider the implications for our work. We will continue our programme to equip colleagues with the skills, training and tools to extract insights from increasingly complex data sets, in order to deliver improved policy and operational outcomes. We will identify projects in which we can trial creative and innovative approaches and techniques, especially focused on the challenges of delivering work quickly where needed and facilitating creative thinking while working remotely or in hybrid office and remote working.</p>	<p>Ongoing</p>

<p>Sustainability and climate change. We will continue our work to analyse the sustainability of our industries, including how they affect the environment, and are affected by it, how technologies can help other sectors reduce their carbon footprint, and what actions can be taken to tackle the challenges presented by climate change and the UK's future net-zero carbon target. We will also consider what role Ofcom could have in addressing sustainability issues within communications sectors.</p>	<p>Report Q3 2021/22</p>
<p>Annual diversity report. In Q2 2021, we will publish our annual diversity report which looks at diversity, inclusion and equality at Ofcom. It looks at the diversity profile of colleagues at Ofcom overall and in areas such as pay, recruitment, performance and promotions. The report will explain our gender, ethnicity, and, for the first time, disability pay gap data for 2020/21. The report helps us to determine our strategic diversity and inclusion priorities and objectives for the coming year.</p>	<p>Report Q2 2021/22</p>
<p>Carbon footprint reduction. With the aim of gaining an ISO14001 certification by Q4 21/22, and as part of our Reduce, Reuse, Recycle initiative, we will look at the following: environmental management to be more prominent within the organisation's strategic direction; the implementation of proactive initiatives to protect the environment from harm, such as sustainable resource use and climate change mitigation; the addition of a stakeholder-focused communication strategy; and easier integration into other management systems.</p>	<p>Report Q4 2021/22</p>
<p>Spectrum business sector reviews. We are reviewing the role of spectrum in supporting energy distribution networks to meet Government targets on carbon neutrality and manage new distribution models. We will also update our satellite and space strategy to refresh our programme of work and identify new activities to support the growing role of this sector.</p>	<p>Ongoing</p>
<p>Digital Regulation Cooperation Forum (DRCF). Building on the establishment of the DRCF in July 2020, we will be working with the CMA, the ICO and, from 1 April 2021, the FCA to ensure a coherent regulatory approach to online services and issues. The DRCF workplan for 2021/22 includes planned work on issues such as: algorithmic processing; developing our capabilities; and working through specific policy interactions such as how the VSP regime and the children's code operate together to deliver the best outcomes for internet users.</p>	<p>Ongoing</p>
<p>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.</p>	<p>Publications Q1, Q2 & Q3 2021/22</p>
<p>Media Nations. We will publish our annual report on key trends in the television and video and radio and audio sectors, which also features a version for each of the devolved nations.</p>	<p>Report Q2 2021/22</p>

<p>Online Nation. We will publish our annual report on what people are doing online, how they are served by online content providers and platforms, and their attitudes to and experiences of using the internet.</p>	<p>Report Q1 2021/22</p>
<p>Consumers' behaviour and experience of using mobile services. We will use crowdsourced data to examine how people are using mobile phone services and the quality of performance provided to them by mobile network operators.</p>	<p>Report Q2 2021/22</p>
<p>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, to complement 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.</p>	<p>Report Q1 2021/22</p>
<p>Reporting on children's media literacy. We will publish our annual Children's Media Use and Attitudes report, providing evidence on media use, attitudes and understanding among children and young people aged 5-15, as well as information about the media access and use of children aged 3-4. The report will also include parents' views about their children's media use, and the ways in which parents monitor or limit children's use of different types of media. Alongside this, to complement our quantitative surveys, we will publish our annual Children's Media Lives report, detailing the findings from our small-scale, longitudinal, ethnographic qualitative research among children and young people.</p>	<p>Report Q4 2021/22</p>