Ofcom

Ofcom's Plan of Work 2024/25

Making communications work for everyone

Published 26 March 2024
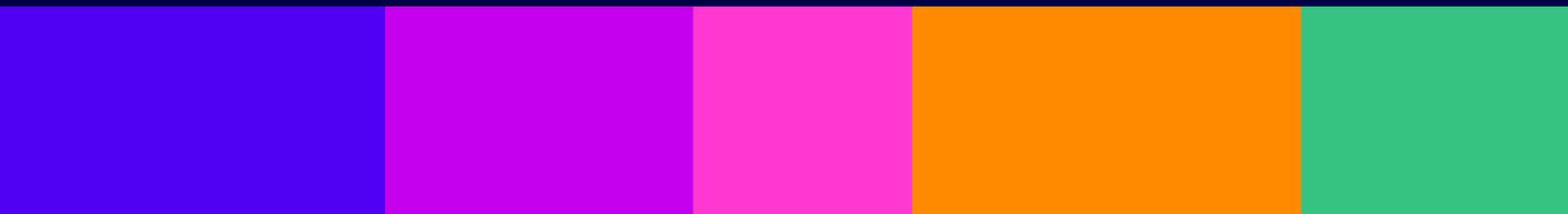
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Foreword

At the core of Ofcom's mission is our commitment to make communications work for everyone in the UK, and that sense of purpose has never been more important.

Whether it's seeing full-fibre networks being rolled out faster than ever, or audiences gripped by hits like *The Traitors* on BBC One and ITV's agenda-setting *Mr Bates vs The Post Office,* modern communications are the lifeblood of our society. They are central to the economy – whether in finance, manufacturing or the space sector – and they bring us together by connecting us to each other and to the world.

Innovation is central to all our sectors, so our Plan of Work sets out our work for the coming twelve months but also looks beyond that.

As the telecoms regulator we are addressing inflation-linked price rises to help consumers now, but this year we will also start work on our next regulatory Access Review to help drive fibre connections to even more households, so that everyone can access the fast and reliable networks they need into the 2030s.

In broadcasting we will continue to uphold standards on air, an even more important job in a general election year. We will take forward the implementation of the Media Bill once it becomes law, and will also begin our next review of public service media to ensure that audiences continue to enjoy high-quality, UK content into the future.

2024/25 will be Ofcom's first full year as the Online Safety Regulator. During the next twelve months, our focus is to get the necessary codes and guidance in place so that we can enforce against the new rules as quickly as possible from 2025 onwards.

Our programme of work to enable wireless services in the wider economy will focus on solutions including sharing to maximise spectrum supply across a variety of bands and to meet the needs of a diversified set of users. We will also continue to open access to spectrum for satellite growth and continue to support and manage a growing stakeholder base and their timely access to spectrum without harmful interference.

In all our work we need to remain alert to the rapid technological innovation that is transforming our sectors and the wider economy, most notably new forms of Artificial Intelligence (AI). Our strategic approach to AI, published with this Plan of Work, sets out what this means, from new risks and opportunities on social media, safeguarding accurate and trusted news to the need to tackle heightened risks of scams.

Ofcom's strong relationships with our partners – including civil society, law enforcement, security agencies and other regulators both in the UK and overseas – have never been more important and are central to navigating such a dynamic environment.

We were delighted to host in-person engagement events across the four UK nations in January, and I would like to thank all of those who attended. We heard a range of views, from industry bodies outlining technical developments, to consumer groups highlighting the challenges faced by those in vulnerable circumstances. We have reflected this feedback in our final Plan of Work for 2024/25.
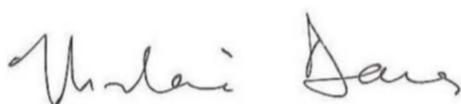
Dame Melanie Dawes, Chief Executive

1. Overview

1.1   2023 has been a significant year for Ofcom. Our remit has evolved greatly since we were established in 2003, not least with the passage of the Online Safety Act in October 2023. This represents the biggest change to our duties in Ofcom's history. In taking on this new role – just as we do in our existing work across telecoms, broadcast media, post and spectrum – we will seek to serve citizens and consumers, and work with industry towards our mission to make communications work for everyone.

Looking back at 20 years of Ofcom

1.2   2023 marked our 20th anniversary as the UK's converged communications regulator. It's a good time to look back at two decades of transformation in how people in the UK communicate and to anticipate how things will continue to evolve. The digital revolution has been a defining force over this period, transforming how we work and study as well as how we get news, entertainment and stay connected with friends and family. All this means that, while Ofcom's mission has remained constant, how we deliver it has changed significantly since 2003.

1.3   For consumers and industry alike, the world of 2003 was very different. In 2003 most homes and businesses still used a traditional landline phone – connected to the exchange by copper wires. Although 75% of adults owned a mobile phone, they were mostly used for calls and text messages and the iPhone did not exist until 2007.

1.4   Television was yet to undergo the digital and on-demand transformation of recent years. Half the UK only had five channels, high-definition services were in their infancy, and most of the platforms that dominate our screens today – such as Netflix, Disney+ and BBC iPlayer – did not exist. In 2003, soaps such as Coronation Street were the most-watched programmes reaching 19.4 million viewers, compared to a highest reach of 12 million in 2023 for the BBC's coverage of the coronation of King Charles III.[1]

1.5   The vast majority of radio listening was over analogue AM/FM broadcast but through digitalisation, radio has remained remarkably resilient. Although average weekly live radio listening has fallen by four hours per week since 2003, listeners are still tuning in to 20.5 hours per week, and radio's quarterly reach remains at about 90%.[2]

1.6   In 2003, life online was quaint compared to today's 'always-on' lifestyle and many everyday services were yet to emerge: no Facebook, X (formerly Twitter), Instagram, or YouTube. Only 50% of UK homes had an internet connection and most of those were old fashioned dial-up connections, unable to support easy downloading of video or audio, let alone streaming.

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[1] Broadcasters' Audience Research Board (BARB), (2023)
[2] Media Nations, Ofcom (2023)

Today's consumer landscape

1.7 Today, as we support the telecoms industry to move from old technologies to new, coverage is better than ever, with almost 22 million homes (73% of the UK total) able to access gigabit-capable broadband, and 5G outdoor coverage available to 85% of homes.[3] Our work to improve coverage and promote affordability continues to be crucial as these services are increasingly important to all aspects of our lives.

1.8 In broadcast media, the trend away from traditional scheduled TV continues, and on-demand services are thriving with their total share of long-form viewing forecast to reach 30% by 2025.[4] YouTube and Facebook now reach 91% of all UK internet users every month. People are increasingly happy to move between watching broadcast and on-demand services. Despite this, traditional broadcasters maintain a 60% share of video viewing.[5] We still receive a significant number of viewer complaints. Setting and enforcing standards, while safeguarding freedom of expression, remains core to our work.

1.9 As we increasingly live our lives online, there are also growing opportunities for online harm. Over half of social media users aged 16-24 think they spend too much time online, although many are taking steps to manage this with 36% taking breaks from social media apps.[6] Parents are also worried about their children's media use, including being bullied online. For example, 75% of parents worry about their child seeing content that is not appropriate for their age.[7]

Industry and technological trends

1.10 In this fast-changing world Ofcom needs to keep pace with technology. While the communications sectors have always been marked by innovation, change is accelerating with a near-constant stream of new technologies and applications. Artificial Intelligence (AI) is at the forefront and AI-driven services are already transforming many sectors. We are working with stakeholders, fellow regulators and the UK Government to better understand and anticipate this change.

1.11 There are implications for network security and resilience as services become increasingly interconnected and telecoms operators 'virtualise' their networks, relying increasingly on Cloud services. Looking further ahead, immersive technologies (including virtual reality (VR) and augmented reality (AR)) and connected devices (such as autonomous vehicles or drone technology) are likely to grow to play a bigger role. These all may benefit society while also exacerbating the risk of harm.

1.12 Underpinning this is the global nature of the services we regulate and the platforms that are used by consumers. In responding to the needs of UK consumers we must also have an eye to global developments. Change in today's world happens quickly and spreads globally. Ofcom is adapting to this change by collaborating with stakeholders internationally across increasingly global issues.

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[3] Connected Nations, Ofcom (2023)
[4] Future models for the delivery of public service broadcasting, Mediatique (2020)
[5] Media Nations, Ofcom (2023)
[6] Children's Media Lives, Ofcom (2023)
[7] Children's Media Lives, Ofcom (2023)

The year ahead

1.13   We have drawn up our Plan of Work for 2024/25 in the context of these developments. It centres on four enduring priority outcomes: '**Internet we can rely on**', '**Media we trust and value**', '**We live a safer life online**' and '**Enabling wireless services in the wider economy**'. Each of these is supported by a set of sub-outcomes, presented below alongside key deliverables from the comprehensive workplan detailed in this consultation.

Internet we can rely on

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

1.14   Projects supporting delivery of this outcome in 2024/25 include:

- Beginning the **Telecoms Access Review**, and the **Wholesale Voice Review**.
- Promoting **network security and resilience**, notably under the Telecoms Security Act.
- Managing the **migration from legacy services and old technologies**.
- Monitoring **consumer protection rules**, protecting **vulnerable consumers** and monitoring the **affordability of telecoms services**.

Media we trust and value

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

1.15   Projects supporting delivery of this outcome in 2024/25 include:

- Supporting **Public Service Broadcasting (PSB) and the Media Bill** reforms.
- **Public Service Broadcasting (PSB) relicensing** and related work.
- **Protecting broadcast audiences from harm and preserving due impartiality**.
- **Monitoring BBC performance** and other ongoing work to regulate the BBC.
- Undertaking a **review of local media** in the UK.

1.16   Projects supporting delivery of this outcome in 2024/25 include:

- **Implementing the online safety regime** including publishing our consultation on codes and guidance related to the **protection of children**.
- **Engaging with online services within scope of the new regime**, notably high-risk or high-reach services.
- Continuing to develop our **operational effectiveness**.
- Continuing our regulation of **video-sharing platforms (VSPs)** and our **Making Sense of Media (MSOM)** media literacy programme.

1.17   Projects supporting delivery of this outcome in 2024/25 include:

- **Supporting network evolution and convergence** including by preparing to award spectrum in the 26GHz and 40GHz mmWave bands.
- **Accelerating innovation in spectrum sharing** and coexistence approaches to spectrum authorisation across different bands.
- **Updating and reviewing the spectrum management framework**.
- **Continuing our international leadership on spectrum management**.

1.18   In addition to these four outcomes, Ofcom maintains its important work in regulating the postal sector. In 2024/25 we will publish an update following our calls for input on the need for reform of the Universal Service Obligation (USO) and will assess Royal Mail's quality of service performance during 2023/24.

Our supporting work

1.19   As well as setting out how we will deliver our duties, our Plan of Work outlines how we support our policy work through our professions including: our research programme to understand consumers; our horizon-scanning to keep pace with developing markets and business models; and through our understanding of how technology is changing networks and services. We will look at the impact of our work, notably through our ex-post evaluations. We will also drive the use of technology and data across our policy work and are publishing an update on our strategic approach to Artificial Intelligence (AI) alongside this Plan of Work.

1.20   Our work increasingly relies on important domestic and international partnerships with other regulators and experts. We will continue our work through the Digital Regulation Cooperation Forum, the Global Online Safety Regulators Network, the UK Regulators Network (UKRN), and we will play a lead role in the global coordination of spectrum management.

1.21   Ofcom was established as a converged regulator for the communications sectors. This continues to be a strength as we set out our Plan of Work for 2024/25 and build on 20 years of making communications work for everyone.

2. Our priorities for 2024/25

2.1   While our duties and functions are set out in a number of Acts of Parliament (a full summary of our duties is contained in Annex 1), our principal duty is to further the interests of citizens and consumers in relation to communications matters, where appropriate by promoting competition.

2.2   As an independent statutory regulator, our Plan of Work is informed by these duties and a wealth of evidence gathered through robust research, analysis, insights, and engagement. The Plan of Work is centred around four evidence-based priority outcomes: **'Internet we can rely on', 'Media we trust and value', 'We live a safer life online',** and **'Enabling wireless services in the wider economy'** with an additional section on **Post**.

UK Government Statement of Strategic Priorities

2.3   Alongside our independent status, we must also have regard to the UK Government's Statement of Strategic Priorities (SSP) for telecommunications, the management of radio spectrum, and postal services in exercising our regulatory functions relating to those matters. The SSP, published in 2019, sets out four UK Government policy priorities. In developing our Plan of Work 2024/25 we have had regard to these four priorities in the following ways:

- **World-class digital infrastructure:** Our work to begin re-assessing the fixed telecoms markets, and our continued support for investment in new technologies align with this priority. The delivery of our spectrum duties also supports innovation and the evolution of the UK's networks.
- **Furthering the interests of telecoms consumers:** In addition to protecting telecoms consumers through shifts in technology, we have an ongoing commitment to furthering the interests of citizens and consumers by ensuring they are better informed and protected. We will report on affordability and monitor social tariffs, as well as tackling scams and monitoring industry compliance with consumer rules.
- **Secure and resilient telecoms infrastructure:** Our work on network security and resilience includes consulting on revised guidance on the resilience of their networks and services. Under the Telecoms Security Act, we will monitor communications providers' compliance with the new security framework, submitting our first report to the Secretary of State later this year.
- **Postal services:** We will continue our work to secure the long-term sustainability of the postal sector. We will consider responses and next steps on our call for input, setting out options for reform of the universal service obligation (USO), continue our monitoring work and assess Royal Mail's quality of service performance during 2023/24.

2.4   The Online Safety Act 2023 also enables the UK Government to designate a SSP for online safety matters, but no SSP has yet been designated.

Our priority outcomes

The following section details our four priority outcomes and how their delivery will be supported by our projects and programmes over the course of 2024/25. A comprehensive list of associated project work is set out in the Plan of Work 'Project Annex' (Annex 2).

Internet we can rely on

Fast and reliable connections and services for everyone, everywhere

This priority outcome is about the networks that connect us and the communications services that are used over these networks. Increased demand and adoption of new services has driven greater dependence on communications networks, highlighting the need to have networks and services on which we can rely.

2.5   We aim to protect the interests of consumers and support everyone, everywhere to access fast and reliable connections and services. We will also work to promote competition and investment to drive forward networks and services on which the UK can depend, and focus on ensuring they are safer, more secure and resilient.

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

- Availability of high-quality networks and services where they are needed.

- Reliable and secure networks people can depend on.

- People trust the services and networks they use.

- Consumers are confident and able to engage and make choices in the market to get the right services for them.

- Consumers are able to access services which are affordable.

2.7   In 2021 we detailed our strategy for promoting competition and investment in fibre networks when we published the Wholesale Fixed Telecoms Market Review (WFTMR), which set out the regulatory framework for the period April 2021 to March 2026. This year we will start the process of re-assessing the fixed telecoms markets to see if any changes are needed to our approach as we set the regulatory framework which will apply from April 2026 to March 2031 (alongside the process for the separate regulatory framework that applies in the Hull Area). We will continue to monitor implementation of the current WFTMR (which runs until March 2026), ensuring that competition plays out fairly, including through the ongoing work of our Openreach Monitoring Unit.

Full fibre coverage for the UK as a whole has passed the halfway threshold to

57%
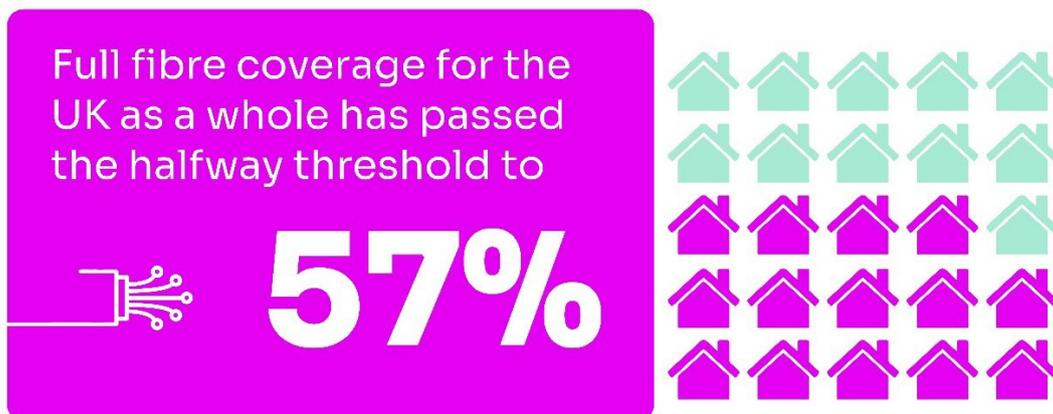
Source: *Connected Nations, Ofcom (2023)*

2.8 Competition plays an important role in improving the quality and availability of mobile services, with better information on network performance enabling consumers to make informed choices about the network that best suits their needs.

2.9 For consumers to get the right services for them, they need to be able to successfully engage with the market – they need clear information that they can easily understand. We have consulted on changing our rules to ban telecoms and pay TV providers from including inflation-linked, or percentage-based, price rise terms in all new contracts. We will publish our final decision on these proposals in spring 2024.

2.10 As technology improves, and consumers increasingly demand new and better services, it becomes necessary to switch off old technologies and replace them with newer ones. In relation to fixed networks, the old analogue telephony network (PSTN)[8] is in the process of being replaced with a new digital system, and the old copper network is being replaced with a faster and more reliable fibre network. In mobile, parts of the 3G network have already been switched off, with the remaining parts being switched off over the next couple of years, while the 2G networks intend to be switched off by the end of 2033. This will free up spectrum and allow improvements to the 4G and 5G networks. This will enable customers to benefit from better, faster, and more reliable mobile services. We are working closely with industry and government to ensure customers are supported and protected through these transitions.

2.11 We are also working to promote better network resilience and have consulted on revised guidance for communications providers on the resilience of their networks and services. We continue to provide expert advice to the UK Government as it develops its position on the future requirements for resilience of digital infrastructure.

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

- **Telecoms Access Review:** The current regulatory framework that we set in 2021 ends in March 2026. We will start our next review which will set the regulatory framework from April 2026 to March 2031 and publish our main consultation by Q4 2024/25. This will cover the markets for physical infrastructure access, wholesale local access, leased line access and

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[8] Public Switched Telephone Network

other relevant markets. We will assess whether the framework we put in place in 2021 to promote network investment and competition remains appropriate.

- **Telecoms Access Review (in Hull):** The current, separate regulatory framework that applies in the Hull Area ends in October 2026. We are starting our review of fixed telecoms markets which will set the regulatory framework from November 2026 to October 2031.

- **Wholesale Voice Review:** Ofcom regulates the wholesale prices for call termination that underpin landline and mobile telephone services in the UK. We will begin work that will enable us to review the regulation of these markets for the April 2026 to March 2031 period. We will also monitor the market for wholesale SMS[9] termination and its impact on the retail business messaging market and will consult in 2024/25 if the monitoring indicates it to be appropriate.

- **Inflation-linked in-contract price rises:** We have consulted on banning telecoms providers from providing for either inflation-linked price rises or price rises that are set out in percentage terms in contracts. Instead, where companies' contracts provide for any price rises during the contract period, our proposals would require them to set this out up-front in pounds and pence. We will publish our final decision in spring 2024.

- **Security and Resilience:** Using our powers introduced by the [Telecommunications (Security) Act 2021](#), we will continue to monitor communications providers' compliance with the new security framework. We will also submit our first report to the Secretary of State on telecoms security by October 2024. Under our Network and Information Systems (NIS) Regulations responsibilities, we will continue to make sure operators of essential services are managing security risks and will engage with industry to carry out our threat intelligence-led penetration testing scheme (TBEST) on telecoms and digital infrastructure. We will continue to engage with vendors to ensure we maintain a broader understanding of the evolving telecoms ecosystem. In addition, we plan to consult on possible interventions to tackle the misuse of 'Global Titles' numbers, which are used for signalling between mobile networks.

2.13   In addition to these areas of increased activity, our Plan of Work includes ongoing programmes that will support our work in this area.

- **Monitoring compliance with Consumer Protection rules:** We will continue to ensure that our consumer protection interventions and voluntary initiatives are being properly implemented and that they have a positive impact on consumers.

- **Strategic review of alternative dispute resolution (ADR) in telecoms:** ADR provides an important protection through independent and impartial assessment on unresolved complaints between a consumer and their provider. We have commenced a review to consider consumers' ability to access ADR, assess consumers' journey through ADR processes and on Ofcom's oversight of the schemes.

- **Affordability:** We will report on the extent to which households have difficulty paying for communications services, particularly in relation to broadband. We will also continue to monitor the availability, promotion and take-up of social tariffs and help raise awareness among eligible customers.

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[9] 'Short message service'.

- **Protecting vulnerable customers:** We will continue to monitor whether providers are treating vulnerable customers fairly by giving them the support and services they need. In particular, this will include work with smaller providers. We will also work with the UK Regulators Network to improve outcomes for vulnerable consumers.

- **Tackling scam calls and texts:** We will continue our strategy to make it difficult for scammers to use UK telecoms networks to harm consumers. We will do this by disrupting scams, collaborating and sharing information across sectors to ensure a joined-up approach, and helping consumers avoid scams.

- **Switching implementation:** We will continue to work with industry to monitor and supervise its revised launch of One Touch Switch in September 2024 to ensure the process works well for consumers. One Touch Switch will mean consumers only need to contact their new home broadband provider to switch and will also be able to switch more quickly – in just one day where this is technically possible.

- **Migration from legacy services:** The managed transition away from legacy services such as traditional PSTN landline telephony and 2G/3G mobile is key to ensure that the UK and customers continue to benefit from reliable and more effective networks. We will work with industry and government to ensure that customers are supported and protected through the transitions.

- **Digital markets:** As part of our Digital Markets programme, we will continue to monitor developments and explore how our work needs to adapt to the digital markets that underpin, and increasingly define, the experience of communications consumers today.

- **Data reporting:** We will continue to report on the coverage, take-up, usage and availability of broadband and mobile networks. We will also report on the forward-looking plans of providers to deploy gigabit-capable networks.

- **Mobile coverage:** We will continue working with industry to improve the accuracy and consistency of available coverage and performance information; exploring how different sources of real-world data can provide consumers with more information about the mobile performance they can expect, including specifically considering coverage and performance on the UK rail network. We will consider ways in which we can improve the presentation and positioning of this information so that consumers and stakeholders can use it most effectively.

- **Broadband USO delivery:** We will continue to monitor the delivery of the broadband Universal Service Obligation (USO) by the designated providers (BT and KCOM). We will also provide support and input to the UK Government's current review of the broadband USO as necessary.

Media we trust and value

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

The UK's media sector continues to transform in response to global competition, new technologies and ongoing changes in consumer behaviour. We are committed to maintaining a wide range of high-quality content and services, protecting audiences from harmful content and ensuring news is duly impartial and duly accurate.

2.14   Audiences in the UK enjoy an extraordinary choice of content from a wide range of providers: both UK and global, broadcast and online, paid for and free. The broadcasting and media sector is also a valuable part of the UK's culture and economy but faces challenges in the current economic climate and inflation in costs, with audiences also responding to rising prices for content and services.

2.15   The long-term shift in audience choices, from broadcast channels and programmes towards online media services and short-form content, is an increasing focus of our regulatory work. While on-demand services continue to grow in use, live broadcast TV and radio services are still widely used and valued. Each week over three quarters of UK adults watch live broadcast TV, and about nine in ten adults listen to live radio. However, live broadcast services represent a declining share of average viewing and listening time, particularly in younger age groups.

While on demand services continue to grow in use, live broadcast TV and radio services are still widely used.

Each week over three quarters of UK adults (79%) watch live broadcast TV, and about nine in ten adults (88%) listen to live radio.
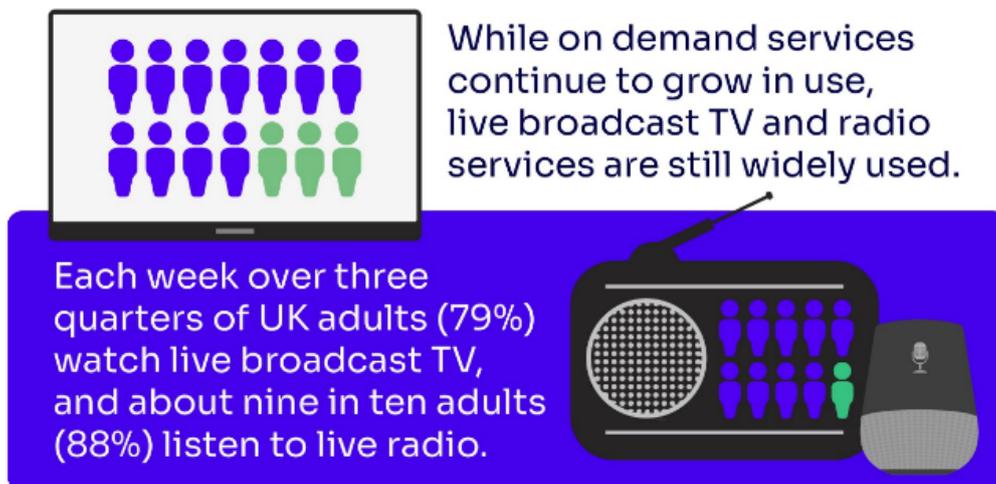
Source: Media Nations, Ofcom (2023)

2.16   The degree and pace of change means that there is significant work to do to support the UK media sector, its mix of content providers and its range and diversity of services for audiences. During this time, we will continue our work in setting and enforcing content standards as the post-transmission regulator of broadcast TV, radio and Video-on-Demand (VoD) services. We will take robust enforcement action where necessary, prioritising the enforcement of rules relating to potential harm to the audience and the preservation of due impartiality and due accuracy.

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

- Audiences can watch and listen to public service content which is produced across the UK and reflects its diversity.

- A plurality and choice of a wide range of providers and producers competing fairly for audiences.

- Audiences are protected from harmful content and freedom of expression is safeguarded.

- People can trust what they watch and listen to – broadcast news is duly accurate and duly impartial, and current affairs content is duly impartial.

2.18   We also need to ensure that our regulation adapts for changes in the sector and audiences' needs. We undertake work to understand changes in markets and audience behaviour, and report on, advise on and implement changes to our regulation. During the coming year, key projects will include:

- **Media Bill reforms:** The UK Government introduced a Media Bill to Parliament in November 2023. The Bill proposes a number of reforms to the legal framework for the regulation of Public Service Broadcasting (PSB), including to facilitate the delivery of public service content through online platforms and to ensure that public service content is available and prominent on those platforms that audiences primarily use to watch TV. The Bill will also make changes to the legal framework for the regulation of radio services, place new obligations on connected platforms and expand accessibility and audience protection requirements to the most popular Video-on-Demand (VoD) services. The Bill will give Ofcom new powers and duties in a number of areas, which we will begin to implement into new regulatory frameworks. In February 2024, we published our Media Bill: Roadmap to Regulation which sets out these areas and our high-level plan for implementation of the Media Bill. The plans set out in the Roadmap are ultimately dependent on the final text of the Bill, the point at which it achieves Royal Assent and the timing of secondary legislation required to bring parts of it into effect. Our plans are therefore indicative and subject to change.

- **Implementing recommendations for regulation of the BBC.** The UK Government published its Mid Term Review (MTR) on the governance and regulation of the BBC in January 2024. This included a number of recommendations for both Ofcom and the BBC. The key recommendations for Ofcom were:

  o To extend our content standards enforcement powers to the BBC's public service online material. We will develop and consult on a new BBC Online Material Code to implement these new enforcement powers (once a revised Framework Agreement has been published).
  o To review a representative proportion of the BBC's final stage decisions that are not escalated to us by complainants. We will publish a summary of the findings of our review in our Annual Report on the BBC.
  o To modify some of the processes for assessing the BBC's impact on competition. Once the revised Framework Agreement is published we will consult on changes to our competition guidance to reflect these modifications.

We will keep stakeholders informed about ours and the BBC's progress in implementing the recommendations through our Annual Reports on the BBC.

- **Public Service Broadcasting (PSB) relicensing and programme of work:** We expect to publish statements on the renewal of the Channel 3, Channel 5 and Channel 4 licences in the first half of 2024. We will also begin work on our next Public Service Media (PSM) Review and related programme of work. As part of this we will report on the PSB's performance and delivery from 2019 to 2023, and on how PSM can be maintained and strengthened in the future. We will publish the scope of our review in 2024, which will set out the programme of work and our timetable for publishing key documents.

- **Upholding Video-on-Demand (VoD) standards:** We will ensure providers are complying with statutory requirements around harmful content. We are preparing for new duties in this area, as set out in the Media Bill, that would give Ofcom powers to draft and enforce a new VoD standards code, similar to the Broadcasting Code.

- **Commercial radio local content:** Following the Media Bill, we will consult on new 'localness' guidelines and implement a new regime for regulating local news provision on analogue commercial radio.

- **Local Media Review:** We are undertaking a review of the local media sector in the UK, looking at how local media is changing and what audiences need and value from local services. This work will also consider the BBC's position in the local news sector (as recommended by the DCMS in its Mid Term Review (MTR) of the BBC). We will publish a report setting out our findings in 2024.

- **Online News:** Building on our discussion document on media plurality, we will continue our work to understand how peoples' interaction with news content is affected by online platforms, including social media. We will also conduct our triennial review of the Media Ownership Rules and publish our report, and any recommendations, to the UK Government.

- **Advertising regulation:** We will continue preparations for the new statutory restrictions on the advertising of less healthy food and drink products that come into force in October 2025 (applying to TV, on-demand and online advertising). We will also continue our work with DCMS on its online advertising programme, to ensure that advertising regulation across different media remains coherent and effective.

- **Future distribution of broadcast services:** Following our call for evidence, we will report to Government on the *Future of TV Distribution,* and will continue to evaluate changes in the distribution and consumption of TV and audio content and the implications for audiences and networks.

- **Connected TV Platforms:** As part of our Digital Markets programme, we will continue to examine issues relating to the role of content intermediaries in UK media markets, focusing on connected TVs, and their potential effects on competition and consumer outcomes.

2.19 Our Plan of Work also includes an ongoing programme of activity to secure the outcomes for all audiences.

- **Protecting broadcast audiences from harm and preserving due impartiality:** We will continue to set and enforce content standards in our work as the post-transmission regulator of broadcast TV and radio. We take into account broadcasters' – and audiences' – right to freedom of expression but we will also take robust enforcement action against broadcasters that breach our rules, prioritising the enforcement of rules relating to potential harm to the audience. These include rules prohibiting the broadcast of content likely to incite crime, uncontextualised hate speech and upholding due impartiality and due accuracy in news and due impartiality in current affairs.

- **Licensing TV and radio broadcast services:** We will continue to issue, manage, and maintain licences for all national and local commercial TV, digital commercial and digital community radio services, and restricted analogue radio services. We will respond to stakeholder requests to make changes to their licences where appropriate.

- **Supporting platforms for broadcast services:** We will continue to expand listener choice by licensing small-scale DAB digital radio services throughout the UK, and renewing licences for the multiplexes which carry local DAB services. We will work with DCMS following the completion of its consultation on the Local TV sector and licences, and on plans to designate additional Electronic Programme Guides ('EPGs') as 'regulated EPGs' following DCMS' consultation.

- **Accessibility of TV and VoD services:** We will continue to enforce requirements for broadcast access services – subtitles, audio description and signing – as well as working with the UK Government to introduce new accessibility requirements for certain on-demand services. Following consultation, we will be publishing our revised 'best practice' guidelines on providing high-quality access services.

- **Equity, diversity and inclusion (EDI) in broadcasting:** Following the launch of our EDI strategy and data toolkit, we will build on the data we collect to report on EDI trends within broadcasters' workforces in our annual publication. We will continue to facilitate conversations across the UK's broadcasting industry, fostering collaboration to improve and promote equity, diversity and inclusion.

- **Monitoring BBC performance and market impact:** We will continue to hold the BBC to account for its performance across all its duties, including:

  o Monitoring how the BBC has improved the BBC First complaints process to ensure that it is transparent and works well for audiences. This will include carrying out mystery shopping research on the BBC's complaints system to gauge the effectiveness of the changes the BBC made, following the recommendations in our 2022 statement on 'How Ofcom Regulates the BBC'.
  o Monitoring the implementation of the BBC's Impartiality and Editorial Standards Action Plan and how the BBC is working to improve public confidence in its approach to due impartiality.
  o Holding the BBC to account for how it delivers its Mission and Public Purposes across its public services as it modernises to continue meeting audience needs. This will be under the new BBC Operating Licence and reporting requirements, including through our BBC Annual Report.
  o Continuing to monitor the impact of the BBC's public service and commercial activities on the market, to ensure it does not have an undue impact on competition.

With online services being a core part of our lives, the Online Safety Act is a major step towards ensuring a safer life online for UK users. The new laws aim to hold social media, video-sharing platforms and search engines to account and take measures towards protecting both children and adults online. This priority outcome outlines how we will meet our duties in this area.

2.20   We want to build a safer life online for people in the UK and now that the Online Safety Act has confirmed Ofcom as the online safety regulator, we have a greatly expanded range of duties and powers to help realise this ambition. This builds upon our existing powers to ensure video-sharing platforms (VSPs) established in the UK protect their users and our long-standing work to improve media literacy through our 'Making Sense of Media' programme. We are already consulting on our approach to regulating illegal harms and draft guidance on age assurance, and our work will continue to accelerate in the next twelve months.

2.21   The Act holds companies that operate a wide range of online services (including user-to-user services, search services and pornography services) legally responsible for keeping people, especially children, safe online. It places duties on online services to assess and manage safety risks arising from content and conduct on their sites and apps. It does not expect harmful and illegal content to be eradicated online, but it does expect services to have suitable measures in place to keep adults and children in the UK safe. It also requires pornography providers to ensure children are not normally able to encounter pornographic content on their sites through the use of highly effective age assurance.

Most common concern parents expressed about their child's online use:

seeing content that was inappropriate for their age (75%)

seeing 'adult' or sexual content (73%).

being bullied online (70%)

being bullied via video games (54%).

Source: Children and Parents: Media Use and Attitudes, Ofcom (2023)

2.22   While the focus of the Act is online safety, we will ensure that our approach upholds the importance of freedom of expression online as we take on our new duties.

2.23   To continue to ensure that users stay safe online, services need to embed user safety at the heart of their decision-making. As we implement subsequent phases of the Act in future years, we will also

use our transparency reporting powers to shine a light on how effective platforms' systems and processes are in protecting their users, and to incentivise further improvements.

2.24   Since 2020 we have been regulating VSPs established in the UK, such as TikTok, Snapchat and Twitch. The experience we have gained from this regime has been invaluable in shaping our approach to developing the online safety regime.

2.25   Based on the priorities set out in the Act, we have set out four clear outcomes we are seeking to achieve:

> • Governance: Services have appropriate governance and accountability arrangements in place to assess risk to users, especially children.
>
> • Design and operations: Services put in place the trust and safety measures needed to mitigate risks and keep users safe.
>
> • Choice: Users are aware of what they can do to be safer online, including controlling the content they see, the people they interact with and being able to easily report harmful content.
>
> • Trust: Ofcom is established as a credible and trusted online safety regulator.

2.26   Over the next year, our key programmes of work to support this priority will include:

Online Safety

- **Implementing the online safety regime:** We have moved swiftly off the back of the Online Safety Act being passed in October 2023 – launching the illegal harms consultation shortly after the Act commenced and publishing our draft guidance on age assurance. These are the first steps in a series of consultations that are shaping the regulatory architecture for the online safety regime. They provide an important opportunity for our stakeholders to help inform our approach, and we are working to ensure that all stakeholders – including civil society organisations and victims/survivors of online harm – have a full opportunity to give us their views and help inform our policy. In spring 2024 we will publish our consultations on codes and guidance related to the protection of children, and additional regulatory requirements applying to the largest and most used services will follow in 2025. We have published an overview of the approach we are taking to implementation, including a road map that provides more detail.

- **Engaging with online services within scope of the new regime:** We have identified an initial set of high-risk or high-reach services that we wish to engage with. We have set clear expectations of the nature of our engagement with these services, to understand their assessment and mitigation of risks faced by users of their services, including through the use of our information gathering powers. We will continue to develop relationships with, and build our understanding of, the diverse range of services covered by the online safety regime and have put in place a range of bespoke support for smaller services. This includes digital tools to help them understand the potential implications of the Online Safety Act for their business and users.

- **Developing our operational effectiveness:** The Act represents a significant expansion of Ofcom's duties, and we continue to invest in developing the skills and capabilities required to successfully deliver the new regime. Through our ongoing research and analysis, we will continue to build the evidence base around online harms and the options for addressing them. We will continue to cooperate with UK regulators, in particular in areas where there may be interactions or trade-offs between our objectives, with the Digital Regulation Cooperation Forum (DRCF) being a key forum for collaboration. We will work with overseas regulators and policymakers implementing, or considering, similar regimes, including through the Global Online Safety Regulators Network (GOSRN) which Ofcom will chair in 2024. This will drive alignment and reduce regulatory burdens where possible and improve the effectiveness and efficiency of regulation.

Video Sharing Platforms

2.27   In October 2022 we published our first report covering Ofcom's regulation of video-sharing platforms (VSPs) established in the UK. We reported the steps these platforms had taken to comply with the new regime and set out our priorities for the second year, in particular how platforms set, enforce, and test their approach to user safety. Looking ahead to 2024/25 we will focus on:

- **Platform supervision:** Further developing the effective supervisory relationships we have built with our notified platforms. We will continue to use our supervisory relationships with platforms to understand what they are doing to keep their users safe, to gain insight into emerging issues, and to assess the effectiveness of their safety measures and encourage them to improve their user safety systems and processes.

- **Industry transparency:** We will continue, where appropriate, to publish outputs which give greater insight into how VSPs are carrying out their duties under the VSP regime.

- **Enforcement:** We will continue to use our full range of enforcement powers to promote compliance with the VSP regime.

2.28   We published our updated strategy for the VSP regime in January 2024. This summarises how we have regulated VSPs over the last two years and improvements we have made to the regime. However, this is a limited life regime which will eventually be repealed, and our notified platforms will be regulated under the online safety regime. We will help notified VSPs to prepare for this transition.[10]

Making Sense of Media

2.29   We continue our work in addressing media literacy challenges across the UK through our Making Sense of Media programme. The Online Safety Act brings additional specificity to our media literacy duties. We are focusing our efforts on those most likely to be harmed by online content, including women and girls, and on misinformation and disinformation and on content of democratic importance. In addition, we have duties in relation to media literacy interventions platforms can take to mitigate harms, evaluation, and signposting of resources.

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[10] More information about the transition period is available in our guide to the repeal of the VSP regime (2024).

2.30   In addition to our extensive research publications, we are working with platforms (and engaging with academics, funders, and other stakeholders) to co-create best practice principles for media literacy by design which will empower users to keep themselves safe online.

2.31   In April 2023 we published our Making Sense of Media Annual Plan which looked back at what we achieved in 2021/22 and detailed our plans for 2022/23. We are on track to deliver that plan. We are also required to consult on a strategy which must be set out for no more than three years at a time and will be completed by October. This will reflect our revised duties and specific priorities.

Wireless communication is playing an increasingly significant role across many sectors of the economy and supporting the digitalisation of many sectors. This priority outcome sets out how we will deliver on our spectrum duties and look to keep pace with the growing demand for wireless technology, supporting a variety of services and enabling innovation.

2.32   Radio spectrum is key to the delivery of a wide range of wireless services and technologies that feature in our everyday lives and support businesses and public services. These services include mobile, Wi-Fi, Bluetooth, broadcast radio, television, and satellite navigation. Spectrum is also critical to support the emergency services, air traffic control and radar, and our armed forces.

2.33   Demand for this limited resource continues to increase. As set out in our Spectrum Roadmap, we aim to ensure that this invisible and essential resource is used efficiently to the benefit of everyone in the UK. In particular, we seek to drive innovation. We do this by enabling users to access the spectrum they need through timely allocation of spectrum, supported by effective authorisation approaches and leveraging of the sharing potential of different applications and users.

2.34   While the outcomes we seek in this priority are not necessarily consumer-facing, the services we enable are used by most people every day.

Rain and its intensity and drop sizes can affect the propagation of radio waves and the reliability of wireless services. So we used data from over 300 Met Office rain gauges to update our understanding of rain intensity across the UK.

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

- Spectrum is available to enable the communications industry to meet anticipated growth and innovation in consumer mobile and wireless services.

- Spectrum is available to meet specialised needs of key sectors (e.g. utilities, manufacturing, transport).

- Additional users are accommodated through sustained improvements in efficiency of spectrum use.

- UK interests are represented effectively in international negotiations on spectrum allocation and use.

- Operational execution ensures spectrum is available and harmful interference mitigated through business-as-usual activities (licensing, planning, assurance and compliance).

2.36   Our work programme to deliver these outcomes is focused on the following work areas:

- **Supporting network evolution and convergence:** We want to enable access to spectrum to support competition, innovation and growth across different sectors. We will prepare to award spectrum in the 26GHz and 40GHz mmWave bands for mobile use, but we will not commence the auction process until the Competition and Markets Authority has taken its decision on the proposed merger between Vodafone UK and Three UK. Separately, we will make Shared Access licences available in the 26GHz band. We intend to consult on the award of spectrum at 1.4GHz for mobile use. Additionally, as 6G, next generation Wi-Fi and satellite continue to be the focus of network evolution, we will work to ensure spectrum can be accessed and/or shared by these different technologies to meet evolving business and consumers needs across the UK.

- **Accelerating innovation in spectrum sharing:** We will continue to drive spectrum management innovation nationally and internationally to support more efficient use of spectrum. Our review of the shared access framework has identified areas that will likely improve access to this spectrum for a wider range of users. We will further develop our work to explore innovative sharing and coexistence approaches to spectrum authorisation across different bands (for example in the Hybrid Sharing in the Upper 6GHz band), exploiting spectrum sandbox partnerships with industry and academia as appropriate. We will continue to collect and analyse data to refine our coexistence models, and to inform our policies.

- **Updating and reviewing the spectrum management framework:** Our work takes account of international, technology and market developments to enable timely and efficient access to spectrum by ensuring our spectrum management framework is fit for purpose for an increasing range of wireless services and business models. We will continue the delivery of our space strategy, enabling innovative satellite communication to support UK consumers and businesses. As sectors evolve, we will look at the impact of changing demand from specific sectors or services, with specific plans to review fixed links and mobile satellite services including satellite direct-to-device.

2.37   These areas of focused activity will be complemented by an ongoing programme of work which contributes significantly to optimising spectrum use across the UK. This includes:

- **International leadership on spectrum management:** We represent UK interests in international negotiations and agreements on spectrum allocation and use for all spectrum users. We will take account of the World Radiocommunications Conference 2023 (WRC-23) outcomes and their impact on the future development of European and UK spectrum policies and priorities. We will contribute to international studies that explore coexistence models and conditions for both mobile (Wi-Fi / International Mobile Telecoms (IMT)) and satellite (GSO / NGSO) services.

- **Enhancing our operational capabilities to support spectrum users:** We manage around 400,000 live spectrum licences and continue to give advice and assistance to these spectrum

users. We continue to move more licensing services online, improve access to spectrum information, and enhance our licensing platform to support regulatory decisions delivering a better and more automated experience. We investigate harmful interference and unauthorised or illegal use of spectrum and reduce the risk of harmful interference by limiting the availability of non-compliant equipment.

- **Monitoring and measuring:** We carry out monitoring and measurements to inform our policy development and operational needs. For example, we have tested spectrum sharing scenarios between Wi-Fi and mobile services and continue to measure the impact of electronic radio 'noise' pollution levels on the spectrum environment. We also have an ongoing programme to verify that emissions from radio equipment are within internationally agreed levels for the protection of the public. We will be carrying out measurements to support our assessment of Mobile Network Operators' (MNOs') compliance with their 2020 coverage obligations (falling due at the end of June 2024), under the Shared Rural Network (SRN) programme.

- **Planning of spectrum frequencies:** We continue to engage in the technical planning of frequencies for licensees that use the same spectrum in different areas of the UK, including for radio and TV broadcasting.

Regulation of postal services

2.38   Postal services play a key role in society and the postal market has undergone significant change in recent years as demand shifts from letters to parcels. We want to ensure that all postal users continue to have access to affordable and reliable services across the UK that meet their evolving needs.

2.39   Our regulation of post is underpinned by Royal Mail's universal service obligation (USO). We have a duty to ensure that the USO meets the needs of users and provides affordable services, while also considering its financial sustainability and efficiency.

2.40   In January we published a call for input setting out evidence on the need for changes to the USO to better align with the needs of consumers and ensure it can continue to be affordable and sustainable in the future. We set out a range of options and are seeking input from all interested parties so there can be an informed public debate on how the USO should be modernised for the future. We held stakeholder events in each UK Nation during February and March to discuss the evidence and options. The call for input closes in early April and following this we will carefully consider all stakeholder input, assess the options and publish an update this summer.

2.41   In 2024/25 we will also continue our monitoring work across the postal sector, which will look at the impact of obligations on the parcels market for the handling of complaints, the new obligation on operators to ensure the fair treatment of disabled customers, as well as Royal Mail's efficiency progress and the longer-term sustainability of the postal USO. Finally, we are assessing Royal Mail's quality of service performance during 2023/24 and will decide whether to open a further investigation into its ongoing performance issues.

3. Nations

3.1 Communications services should meet the needs of people and businesses, regardless of geographical location, and there are unique aspects to the way communications services are provided and received in Scotland, Wales and Northern Ireland and some English regions. For example, the landscapes of Scotland and Wales provide particular challenges when it comes to making effective and reliable communications available to their most rural areas, while audiences in Northern Ireland both need and want to see authentic representation and portrayal of their communities across TV and radio.

3.2 Our teams in Edinburgh, Cardiff and Belfast help to ensure that we understand and address the specific circumstances of consumers and stakeholders in each of the nations. Our statutory National Advisory Committees advise us about the interests and concerns, in relation to communications matters, of people living in England, Scotland, Wales and Northern Ireland and are an important part of our policy formulation process.

3.3 Memoranda of Understanding (MoU) in each nation ensure that the views and interests of stakeholders, consumers and audiences in Scotland, Northern Ireland and Wales are represented at Board level within Ofcom. We will continue to engage constructively with the signatories of each MoU, including the relevant governments and parliaments, in delivering our priorities for 2024/25.

3.4 The views of audiences across the UK are also represented on Ofcom's Content Board, which has experienced members representing each of the nations. There is also a statutory requirement for each of the UK nations to have its own representation on the Communications Consumer Panel, which represents the needs of older and disabled people, people in rural areas and those on low incomes.

3.5 The work set out in each of our priority outcomes above will impact the whole of the UK, with some workstreams having particular relevance in the nations. For example, the Media Bill reforms would provide for the availability and prominence of online PSB services across the UK and for their target audiences in each of the UK Nations.

3.6 Finally, we are committed to having a workforce which is representative of the UK's population. Alongside our new Edinburgh office, we are continuing to grow our presence in Manchester, Belfast and Cardiff. An outline of key areas of work and priorities for each of our nations is presented below.

Scotland

3.7 To enhance fixed and mobile connectivity, we will continue to provide technical and regulatory advice to support government initiatives, including the Scottish Government's Reaching 100% programme and the UK Government's Project Gigabit in Scotland. In 2024 Ofcom will assess Mobile Network Operators' (MNOs) compliance with industry funded coverage improvements under the Shared Rural Network Programme. We will support this work through engagement with the Scottish Government, the MNOs, Digital Mobile Spectrum Limited (DMSL) and wider stakeholders – including through our Observer status on the Scottish Government/DMSL working group, which feeds into wider UK governance structures.

3.8   We will actively promote technological innovation through the Glasgow-based ON-SIDE project to utilise Shared Access Spectrum in supporting private 5G standalone networks. Furthermore, we will ensure that people in Scotland are supported through the transition to Voice-over IP (VoIP) services and the switch-off of 3G services through 2024/25 and beyond.

3.9   In line with Ofcom's recently announced work, we will facilitate proactive engagement to ensure that the needs of Scottish consumers and businesses of the universal postal service are appropriately considered and reflected as we present options for its potential future evolution. We will also, through our presence on the Consumer Network for Scotland, and working with organisations including Consumer Scotland and Citizens Advice Scotland, support Scottish consumers facing issues of affordability and compound vulnerability.

3.10   In broadcasting, we will complete the relicensing process for Channel 3, with both STV and ITV applying to renew their licences that provide the Channel 3 network for viewers across Scotland. For Gaelic broadcasting, we will continue to deliver on our statutory duties for MG ALBA, notably in appointing its Board Members to ensure it has the skills and expertise to fulfil its duties and ambitions to be a modern, forward-looking media organisation.

3.11   In supporting consumers to live a safer life online, we will continue our engagement with the Scottish Government to ensure the smooth implementation of the online safety regime in a devolved context, particularly as it introduces its own range of measures to target violence against women and girls. We will facilitate engagement with stakeholders in Scotland during our consultations to encourage a broad range of responses that reflect views from across the country and build on our partnership with Red Chair Highland in Inverness as we deliver our media literacy duties.

3.12   Supporting our work in Scotland is our new office in Edinburgh's Quartermile, a space that we will use both to grow our presence in Scotland and to collaborate with partners and stakeholders throughout the year.

Wales

3.13   Ofcom is fully committed to ensuring that consumers, stakeholders and colleagues in Wales can engage naturally with Ofcom in English and Welsh. We strive to do this in line with our existing duties and we will continue to keep our provision under review. We have established a good working relationship with the Welsh Language Commissioner and their office, and we will continue to collaborate and play our part in helping to reach a million Welsh speakers by 2050.

3.14   Having concluded the review of our Memorandum of Understanding between Ofcom, the Welsh Government, Senedd Cymru and the UK Government, we look forward to continuing to engage fully with all parties in order to implement the memorandum to best effect. We recently worked with the Welsh Government on its appointment of Sir Clive Jones CBE as the new Ofcom Board Member for Wales.

3.15   We will continue to engage widely with our stakeholders to fully understand their priorities and concerns. We will ensure that stakeholders have the best opportunity to engage with colleagues across Ofcom on all relevant programmes of work. This includes supporting them through the transition as network providers retire their legacy networks and replace them with modern systems, and the switch-off of 2G/3G networks.

3.16   We will work with the rural communities experiencing difficulties in accessing good quality communications services and continue to work with industry and the Welsh Government to ensure that they have access to the relevant information and assistance. In the hardest to reach areas, where the deployment of fibre networks is both complex and costly, we will collaborate to raise awareness of alternative technologies such as fixed wireless access and low earth orbit satellites, that may offer workable solutions for some communities.

3.17   Working with colleagues across the UK, we will report on the BBC's performance under its new Operating Licence. We will also re-licence ITV Cymru Wales so that it can continue to deliver much needed plurality in news and current affairs services in Wales in addition to a variety of factual series of specific interest to audiences.

3.18   On online safety, we will expand our engagement with the Welsh Government to include officials with specific responsibilities such as the Digital Resilience in Education team. We will also seek to raise awareness of Ofcom's new responsibilities and explain what we are doing to make life online safer for all, especially children.

Northern Ireland

3.19   We will support Northern Ireland consumers through changes in communication technologies such as 2G/3G switch off and – given Northern Ireland's advanced fibre network rollout – support migration to VoIP and ensure the benefits of improved connectivity are realised across Northern Ireland. Responding to issues around affordability in telecoms, we will improve awareness of the options available to consumers (such as social tariffs) by working with government departments, consumer advocacy groups, charities and other relevant stakeholders.

3.20   In the area of post, we will seek input from stakeholders in Northern Ireland as we carry out work looking at potential options for the future of the universal postal service.

3.21   Throughout the Channel 4, and Channels 3 and 5 relicensing processes, and through our ongoing BBC regulatory work, we will ensure that Northern Ireland audience views and concerns are understood and appreciated. We will continue to be mindful of the impact in Northern Ireland of changes to the broadcasting landscape, and by engaging with local stakeholders, we will maintain a clear understanding of the importance of local content and make sure that Northern Ireland audiences are well-served.

3.22   As the online safety regime is established, we will strengthen and deepen stakeholder relationships in Northern Ireland so that Ofcom's regulatory role is fully understood by elected representatives and government officials, the local tech sector, safeguarding groups, and consumer advocacy groups. We will seek to identify and engage with stakeholders on consultation processes to ensure that NI-specific issues, contexts and expertise are given due consideration throughout. We will coordinate and maintain relationships with Coimisiún na Meán (the new Irish Media Commission) and other relevant stakeholders in the Republic of Ireland as the online safety regime develops there.

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

England

3.24   We will consider the communication needs of consumers across England. The statutory Advisory Committee for England continues to inform Ofcom's policy decisions by identifying issues affecting the communications sectors in England. For example, we will monitor the impact on audiences in England of the proposed changes to BBC local radio.

3.25   We will continue to engage with government, local MPs and local authorities to support the pace of fibre rollout and greater mobile coverage as well as ensuring the reliability and resilience of networks. Our Connected Nations report highlights plans for the deployment of fibre networks which will provide very high-speed broadband services to consumers. By May 2026 the plans aim to cover 98% of urban properties and 78% of rural properties across England.[11]

3.26   As we continue to grow our workforce across the UK, our office in Manchester now supports over 100 colleagues, across Ofcom's remit, who are contributing to the delivery of this Plan of Work.

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[11] Connected Nations Planned Network Deployments (ofcom.org.uk)

4. How we deliver

4.1   Various functions across Ofcom work collaboratively to deliver on our commitments. Below, we have outlined our approach to partnerships, our underpinning work, and how we are investing in our organisational capability and making the best use of our resources.

Partnerships

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

Domestic partnerships

- **Continuing to work with fellow digital regulators through the Digital Regulation Cooperation Forum (DRCF).** We will continue to work together with the Competition and Markets Authority (CMA), the Information Commissioner's Office (ICO) and the Financial Conduct Authority (FCA) to support a coherent regulatory approach to digital services and issues. The DRCF published its annual workplan in April 2023, outlining its key areas of focus for the upcoming year (2023/24). This included joint work on horizon scanning; supporting the development of the Government's AI framework; and our Enabling Innovation workstream, which has led to the Government's announcement in September of a DRCF 'AI and Digital Hub' pilot. This pilot will aim to help businesses navigate the process of making sure they are compliant with digital tech and AI regulations and will be launched in spring 2024. The DRCF has also launched a public call for input, requesting views on what areas it should prioritise in its next annual workplan (2024/25), which will be published in April 2024. We are working particularly closely with the ICO to ensure alignment between our online safety proposals and data protection law.

- **UK Regulators Network (UKRN).** We work with twelve other UK regulators from the Civil Aviation Authority (CAA) to the Competition and Markets Authority (CMA). We work to address challenges across different sectors, to share best practice and to drive forward positive change as a member of the UKRN. The UKRN also engages with external stakeholders to inform and contribute to policy debates, regulatory reviews and cross-sector issues. In particular, we will continue to contribute to joint work with the UKRN to improve outcomes for vulnerable consumers.

- **Engaging with the academic community, civil society and people with lived experience to help develop our evidence base.** We have a focus on building relationships with academic researchers to ensure Ofcom's work is informed by the latest insights from academic research, expert groups and civil society organisations. This is particularly important for online safety, where we will work with a wide range of stakeholders to ensure we have the insights we need to understand user experiences online and the impact of platforms' safety measures.

- **Continuing to work with our co-regulator the Advertising Standards Authority (ASA).** There are longstanding co-regulatory arrangements in place between Ofcom and the ASA that

apply to broadcast, on-demand and VSP advertising, which are due for renewal in 2024. We will review the arrangements to ensure that they remain fit for purpose and effective in protecting consumers from harmful advertising.

- **Making Sense of Media (MSOM) Network and Advisory Panel.** Our MSOM Network currently has 460 members representing a variety of organisations in the UK and internationally, collaborating to improve media literacy in the UK. Our Advisory Panel informs Ofcom's work to help improve the online skills, knowledge and understanding of UK adults and children.

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

- **National Cyber Security Centre (NCSC).** We will continue working closely with NCSC in the area of telecommunications network security in line with the Telecoms Security Act (TSA).

- **Sustainability and climate change.** Environmental sustainability is an increasingly important issue in the sectors we regulate. In 2023, we helped to convene a telecoms industry working group working with the Digital Connectivity Forum and Accenture, which resulted in many of the biggest providers signing up to a commitment to take action. We are encouraged by similar progress in the broadcasting and postal sectors. Many of our regulated firms have committed to net-zero plans and for the first time we summarised this in our Connected Nations report.

International partnerships

4.3 Increasingly, many of the services we regulate operate globally, as do the platforms on which they rely to reach consumers. Therefore, we must increasingly act not only in response to the experiences of UK consumers, but also with an eye to what is happening beyond our borders.

4.4 We do this through our international work, representing Ofcom and the UK in regional and global fora, cultivating, and leveraging our trusted reputation to influence policy at an international level. Our work allows us to influence at a global level and drive improvements in technical areas that require transnational solutions and regulatory alignment, as well as bring back insights to inform our work domestically.

4.5 Our international work is underpinned by ongoing engagement and key strategic relationships with existing networks and organisations such as the International Telecoms Union (ITU) and the recently launched Global Online Safety Regulators' Network (GOSRN), as well as regional regulatory networks such as the European Platform for Regulatory Authorities (EPRA) and the Independent Regulators' Group (IRG). This is in addition to our bilateral relationships with regulators around the world, and with think tanks and the global research community. Broadly, our international work is focused on increasingly intertwined strategic priorities – online safety, digital markets, security and resilience, and international technical standards – and our planned work for 2024/25 includes:

- In **online safety** we will continue developing our international relationships, exchanging best practice and experience. In particular, we foster collaboration and advocate for shared norms in online safety, as founder-members of the Global Online Safety Regulators'

Network, which we will chair in 2024, and through the International Working Group on Age Verification. We will also continue to work closely with EU counterparts on the implementation of rules for VSPs and other online platforms.

- In **internet-based communications markets**, following the conclusion of our work on net neutrality, online personal communication services, and the market study into cloud services in 2023, we will remain vigilant of developments that might influence or have an impact on Ofcom's duties. For example, as authorities around the world explore the role of interoperability in markets such as online personal communication services, or of digital content gateways (such as connected TVs and smart speakers), the interaction between the steps taken in different geographies will require further consideration and co-operation.

- In **security, network resilience and technical standards,** we drive outcomes for the UK through the International Telecommunications Union (ITU), where we represent the UK. As well as serving as the chair of the lead spectrum committee (ECC) and vice-chair of the preparatory committee (COM-ITU) for the European Region, the UK is an elected member of the governing Council for 2023-2026. Ofcom also closely follows discussions on technical standards impacting our sectors in industry-led standardisation organisations such as IETF (Internet Engineering Task Force) and 3GPP (3rd Generation Partnership Project).

4.6   In addition to the work on our international strategic priorities, we will also remain active in matters related to **broadcasting and content**. We will continue to participate in the global debates on regulatory responses to ensure the sustainability of public service media, a debate that has taken on a new dimension and criticality as digital networks and services enable the acceleration of the dissemination of disinformation. In this context, the role of digital and media literacy is more important than ever, especially as we implement the Online Safety Act. We will continue to engage in networks such as the European Platform of Regulatory Authorities (EPRA), European Media and Information Literacy (EMIL) Taskforce and the UNESCO Media and Information Literacy (MIL) Alliance to develop and exchange media literacy best practices globally.

Growing skills and capabilities

4.7   Our most valuable asset at Ofcom is our people. As our sectors evolve and our remit expands, it is vital that our policy teams and professional functions adapt to support effective delivery across every area of our business. We are continuously bolstering our workforce through recruitment and by upskilling our colleagues, so we can deliver our functions to the highest standard.

- **Growing our online safety capability:** The Online Safety Act is the greatest expansion to Ofcom's range of duties and powers in recent years and we have been investing in our workforce to prepare us to deliver these functions successfully. Following extensive preparatory work, we have now formally established our Online Safety Group which brings together people with online safety expertise across the strategy delivery, policy and supervision disciplines. We will continue to invest in developing the technical skills, capabilities and subject-matter expertise required to successfully deliver on our online safety duties.

- **Developing our data and digital function:** We are developing an Ofcom-wide approach to data and have a Data Innovation Hub which is set up to ensure we are making the most of data, Artificial Intelligence (AI) and machine learning to support our policy functions and

beyond. It drives the development of our data focused skills and culture. We are also building tailored training for all colleagues to ensure we have the right skills and approach to allow us to draw valuable insights from complex data.

- **Strengthening our technology capability:** Technology is at the forefront of shaping demand, driving consumer trends, and delivering sophisticated services to consumers and businesses. Therefore, we are continuing to strengthen our expertise across a range of technologies such as AI including specialisms such as Computer Vision and Natural Language Processing (NLPs). We have also invested in specialist training and targeted recruitment in areas such as Privacy Enhancing Technologies (PETs), Decentralised Architectures/Blockchain, Extended Reality (XR) and Digital Identity. These examples of specialist expertise reflect Ofcom's commitment to staying at the forefront of developments in technology.

- **Building commercial understanding and horizon scanning:** We continue to develop our understanding of the sectors we regulate and how our stakeholders and markets are evolving. We achieve this through recruitment from a range of backgrounds and building skills and knowledge among our colleagues. Our horizon scanning programme is another key input to building our understanding of our sectors as we aim to anticipate future developments and trends through external engagement, research, and analysis.

- **Diversity and Inclusion (D&I) strategy:** In August 2023, we published a [progress report](#) to provide an update on how we are delivering on our five year D&I strategy. Ofcom continues to spearhead collaboration across the telecoms sector to boost women in the sector. Our senior ethnicity target has been stretched to 19%, having exceeded our previous target of 16%. We were also named in the [Social Mobility Foundation's Top 50 employers](#) in the UK for social mobility.

- **Connected working strategy:** 23% of Ofcom colleagues are based outside of London now with over 100 colleagues based in our Manchester office, as well as growth to over 80 colleagues in our new Edinburgh office.

Underpinning wider work across the sectors we regulate

4.8   Ofcom is an evidence-based regulator, and we obtain the evidence, intelligence, and insight we require in a variety of ways across our sectors including:

- **Market research and intelligence:** We research communications markets and consumer preferences and behaviour to provide an up-to-date, thorough understanding of people and businesses. We explore innovative research methods including behavioural science where we have established a Behavioural Insights Hub to build a deeper understanding of how consumers make decisions. We combine all our research with data collected directly from industry and third parties. In addition to informing our work, our research, and our commitment to making the findings publicly available, fulfils some of our statuary duties.

- **Data engineering and analytics:** The Data Innovation Hub supports Ofcom's policy work and our operations teams in using data and advanced analytics. We are developing data products and tools to generate insights and help make decisions in an effective and efficient way.

- **Technology insights:** Our technology functions have a dual purpose of helping our policy teams deliver on their current priorities and undertaking forward-looking work to prepare

for future challenges. We are deepening our understanding of how technology is driving change within our sectors and the potential impact on how we work.

- **Artificial Intelligence (AI):** We also support the UK Government's framework for AI regulation as set out in its white paper consultation response. We have published an update on our [strategic approach to AI](#) alongside this Plan of Work, which includes setting out examples of work we have done to identify and explore AI risks and opportunities across our sectors. Many of the projects set out in our 'Project Annex' (Annex 2) will touch on AI, and our AI update provides examples of where this is the case across our remit.

4.9   We are also keen to understand the impact of our work for consumers and on the sectors we regulate. We do this in a number of ways including:

- **Impact assessments:** We have revised our impact assessment guidelines to ensure that our approach to policy appraisals follows best practice. We will conduct analysis to understand how some of our past interventions have shaped consumer outcomes, alongside work to develop data-driven techniques to monitor pricing, quality and investment in the telecoms sector. We will also expand our framework for monitoring and evaluation to online safety – including exploring the use of data-driven approaches to gain insights into services in scope of the regime.

- **Discussion Papers:** The purpose of this ongoing series of papers is to encourage debate on all aspects of communications regulation and to contribute to the evidence base used to create rigorous evidence to support our decision-making. Our research will continue to cover issues such as understanding the effectiveness of measures designed to keep users safer online and how to approach regulation in digital markets.

- **Information gathering:** A key part of our work, and our system for managing the impact this has on stakeholders is delivered through the Information Registry which coordinates formal and informal information requests, working with stakeholders on the timing of planned requests and feedback on information gathering. We plan to consult on our approach to information gathering in 2024.

Achieving value for money

4.10   Ofcom strives to be an efficient and effective regulator, and we continue to look for opportunities to increase efficiency across our work. Since the UK Government's 2015 Spending Review we have achieved real-terms savings consistent with the wider public sector. Over this period Ofcom's base cap for its duties at that time has remained the same (with the exception of a one-off increase for inflation in 2020/21), leading to a reduction in the cost of regulation in real terms.

4.11   Where resources are limited, we will continue to make choices guided by our priorities and we will deploy our resources and skills through effective strategic planning and an integrated approach to our budget and forecasting. 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, including utilising competitive procurement processes to achieve the best price and quality of service from suppliers.

4.12   We will continue to identify opportunities to streamline and automate activities we undertake to deliver efficiencies across the organisation. We have recently introduced an online portal for aircraft, amateur and ships' radio licensing to increase automation while improving the licensee experience. We also review the use of our estate in conjunction with our connected working strategy (detailed at 4.7) and our ambition to locate a greater proportion of roles outside of London.

4.13   With regard to building our online safety function in a robust and efficient way, in July 2023 the National Audit Office reported on Ofcom's preparedness for online safety regulation, noting the increase in the scope of the regime and the resultant increase in employees required to ensure effective preparation and delivery. The report concluded that Ofcom had made a good start to these preparations and had taken all steps it could reasonably have done by this point. This conclusion was corroborated in a subsequent report published by the House of Commons Public Accounts Committee which added that the establishment of the online safety regime has the potential to be a case example of good practice.

Spending cap for 2024/25

4.14   The UK Government agrees a spending cap for Ofcom's budget. We have agreed a spending cap of £131.9m with DCMS and HM Treasury, which has remained the same since 2021/22 and relates to the duties we had at that time. This has resulted in a real-terms saving of 14% to be achieved across the organisation. Since then, Ofcom has been granted powers to undertake new duties in online safety, telecoms security and restricting advertising of less healthy food and drink products. We have also agreed £1.2m for 2024/25 for the DRCF AI and Digital Hub. This has increased our spending cap, resulting in a total spending cap of £204.7m for 2024/25. Following changes in the UK Government, Ofcom's future spending caps will be agreed with the Department for Science, Innovation and Technology (DSIT) and HM Treasury.

4.15   Our costs are recovered from both the operators in the sectors and via retentions of the receipts we collect under the Wireless Telegraphy Act (WTA) for licensing spectrum. The charges due from each sector will be published alongside our Plan of Work Statement in our tariff tables in March 2024. The workplan is reflected in the tariffs we set, and there is no change to the methodology we have used to calculate these charges.

A1. What we do

A1.1   Ofcom's mission is to make communications work for everyone. We regulate fixed-line and mobile telecoms, TV and radio broadcasting, video-on-demand services, post, and the radio spectrum used by wireless devices. Ofcom regulates Video Sharing Platforms established in the UK and we are now the UK's online safety regulatory under the Online Safety Act. 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.

A1.2   We act independently from governments and commercial interests to deliver our duties. 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 previous 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;
- the maintenance of a sufficient plurality of providers of different television and radio services;
- people are protected from harmful or offensive material, unfair treatment and unwarranted invasion of privacy on television and radio;
- the adequate protection of citizens from harm presented by online content on regulated services, through the appropriate use by providers of such services of systems and processes designed to reduce the risk of such harm;

- the BBC is held to account on its compliance with appropriate content standards, its performance against its Mission and Public Purposes, and the impact of its activities on fair and effective competition; and
- the universal service obligation on postal services is secured in the UK.

A1.5   In November 2020 new rules entered into force giving Ofcom responsibility for ensuring that Video Sharing Platforms established in the UK take appropriate measures to protect consumers who engage with those services from the risk of viewing harmful content. In November 2023 the Online Safety Act obtained Royal assent and Ofcom was appointed as the UK's online safety regulator.

A1.6   On 1 October 2022 the new regulatory regime established by Telecommunications (Security) Act 2021 formally commenced. The Act places new strengthened security duties on telecoms providers, with new powers for the Government to set out security requirements and gives Ofcom new responsibilities to make sure providers comply.

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

A1.8   In the Autumn Statement of November 2023, the Government committed to extend the Growth Duty to the economic regulators, including Ofcom.[12] At the time of this publication, the necessary legislation to do so is currently before Parliament alongside updated (draft) statutory guidance.[13] Subject to the passing of that legislation, Ofcom will have a new statutory duty to have regard to the desirability of promoting economic growth when exercising a specified regulatory function. In performing this duty, which will sit alongside our existing duties, Ofcom will consider the importance of the promotion of economic growth and ensure any regulatory action they take is necessary and proportionate. The Growth Duty will apply to all of our regulatory functions except for our functions under Part 3 of the Enterprise Act 2002 (media mergers) and our concurrent competition functions (section 370 and 371 Communications Act 2003). The Growth Duty will also not apply to our online safety functions (within the meaning of section 235 of the Online Safety Act 2023) until April 2026.

Ofcom's competition law powers

A1.9   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).

A1.10   We consider whether it is more appropriate to exercise the Competition Act or sectoral powers in any given case, subject to the specific legislative requirement.

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[12] The Growth Duty is at section 108 of the Deregulation Act 2015.
[13] https://www.gov.uk/government/consultations/smarter-regulation-regulating-for-growth

A2. Project Annex

Internet we can rely on

Project Details	Milestones
Telecoms Access Review 2026-2031. We will start our review of wholesale fixed telecoms markets which will set regulation from April 2026 to March 2031 and will publish our consultation in Q4 2024/25. This will cover the markets for physical infrastructure access, wholesale local access, leased line access and other relevant markets.	Consultation Q4 2024/25
Telecoms Access Review in the Hull Area 2026-2031. We will start our review of wholesale and retail fixed telecoms markets in the Hull Area which will set regulation from November 2026 to October 2031.	Ongoing
Wholesale voice review 2026-31. We will begin to review regulation of the wholesale voice termination markets for the April 2026 to March 2031 period. We will monitor the market for wholesale SMS termination and its impact on the retail business messaging market to assess if there is a need for regulatory intervention.	Consultation 2025/26
Mobile markets. We will continue to monitor consumer outcomes in terms of pricing, quality and changes to how services are being delivered, including through analysis of updated customer level data.	Ongoing
Network security and resilience. **Security:** Using our powers introduced by the Telecoms Security Act, we will monitor compliance with the new security framework and submit our first report to the Secretary of State on telecoms security in Q3 2024/25. We will continue to engage with industry to carry out our threat intelligence-led penetration testing scheme (TBEST) and engage with security standardisation bodies to ensure the requisite visibility.	Report Q3 2024/25
Resilience: We have consulted on revised guidance for communications providers on the resilience of their networks and services and will publish a statement on this next year. We continue to support the UK Government's thinking on the future requirements for resilience of digital infrastructure.	Statement Q2 2024/25
Global Titles (GTs) and Mobile Network Security. There is evidence of some misuse of GTs, raising network security and other risks. We will consult on possible regulatory interventions to tackle this issue and will set out our decisions in a statement.	Consultation Q1 2024/25 Statement Q4 2024/25
Telecoms vendor diversification. We will continue to enable newer vendors' ability to test technology in a commercially neutral environment through the SONIC (SmartRAN Open Network Interoperability Centre) Labs open radio access network testbed. We will also continue to share our insight and expertise with the UK Government across diversification issues.	Ongoing
Net Neutrality. We will continue monitoring ISPs, and of the broader internet ecosystem more generally, for compliance with the Net Neutrality Regulation and updated Ofcom Guidance. We will publish our annual monitoring report in Q3 2024/25.	Publication Q3 2024/25

Project Details	Milestones
PSTN switch off. We will continue to work with communication providers and government to ensure issues raised by the migration to voice-over-IP services, including the on-going switch-off of the public switched telephone network (PSTN), are identified and addressed with the aim of protecting consumers from harm and minimising disruption.	Ongoing
2G/3G switch off. We will continue to work with mobile operators and other service providers reliant on 2G/3G networks to support the switch off. Our aim is to help minimise any disruption during the switch off process and to help protect customers, particularly vulnerable customers, from harm.	Ongoing
Future of numbering policy review. We will continue our strategic review of the telephone numbering plan to make sure it provides what consumers understand, want, and need from numbers for the coming decade. We will consider amendments to clarify the numbering plan rules on revenue sharing.	Statement Q2 2024/25
Phone-paid Services Authority (PSA). We will continue the process of transferring responsibilities from the PSA to Ofcom. We will publish a statement on our decision regarding the draft Section 122 Order. Once this is in force, we will formally take over regulation of phone-paid services.	Statement Q2 2024/25
Implementation of One Touch Switch. We will continue to work with industry after the further delay and revised launch of One Touch Switch to September 2024 to ensure the new switching process is working well for broadband and landline customers.	Ongoing
Affordability of communication services. Our quarterly Affordability Tracker will monitor and report on the extent to which households have difficulty paying for communications services. We monitor the awareness and take-up of social tariffs by provider as well as promotion of these services and report on this in the Pricing Trends publication.	Publication Q1 2024/25
Supporting vulnerable customers. We will continue to monitor whether providers are treating customers in vulnerable circumstances fairly and giving them the support, and services they need. This will include working with the UK Regulators Network to improve outcomes for vulnerable consumers.	Ongoing
Tackling nuisance calls and scams. We will work closely with industry, government and other regulators to make scams harder to perpetrate. We will also help consumers avoid scams by raising awareness and improving information. We will continue to focus on addressing voice scams, while also exploring options to further disrupt the sending of scam messages.	Statement Q2 2024/25
Consumer protection monitoring and compliance. We will continue to focus on ensuring that our consumer protection interventions and voluntary initiatives are being properly implemented and have a positive impact on consumers. This includes considering new customer protections relating to mobile roaming and inadvertent roaming, complaints handling processes and any new rules relating to inflation-linked in-contract price rises.	Ongoing

Project Details	Milestones
Improving consumer experience and information on mobile coverage and performance. We will continue working with industry to improve the accuracy and consistency of available coverage and performance information for consumers and stakeholders. We will specifically consider coverage and performance on the UK rail network.	New mobile checker tool Q3 2024/25
Alternative Dispute Resolution (ADR) review. Ofcom currently approves two ADR schemes. We have commenced a review under the Communications Act to assess whether consumers are receiving accessible, fair, and consistent outcomes from the available ADR schemes in the telecoms sector.	Consultation Q3 2024/25
Inflation-linked in-contract price rises. We have consulted on banning telecoms providers from providing for either inflation-linked price rises or price rises that are set out in percentage terms in contracts. Instead, where companies' contracts provide for any price rises during the contract period, our proposals would require them to set this out up-front in pounds and pence. We will publish our final decision in spring 2024.	Statement Q1 2024/25
Digital Markets. We are collaborating with the CMA to update our public Memorandums of Understanding in the light of legislative changes, so that these documents clarify for stakeholders how we will work together with the CMA in digital markets. .	Ongoing

Media we trust and value

Project Details	Milestones
Material changes to the BBC's public service activities. We will continue to monitor BBC public service activities to ensure any material changes have appropriate regulatory scrutiny if required. This will include the BBC's proposals to launch new DAB+ extensions for BBC Radio 1, Radio 2 and Radio 3, which will also be available on BBC Sounds. It also plans to extend the broadcasting hours of Radio 5 Sports Extra.	Ongoing
BBC Competition Guidance. We will consult on changes to our competition guidance to implement the modifications to the BBC Framework Agreement.	Consultation tbc
BBC Online Material Code. We will develop and implement a new BBC Online Material Code under which we will exercise our new enforcement powers, following changes to the BBC Framework Agreement.	Ongoing
Ofcom's annual report on the BBC. We will set out how we have carried out our duties and assess the BBC's compliance with specified requirements in its Operating Framework and under the new Operating Licence. We will also report on the BBC's performance across our duties, including delivering its Mission and Public Purposes across its public services and continuing to meet audience needs as it modernises its services.	Report Q3 2024/25
Channel 3 and Channel 5 relicensing. Subject to the acceptance of terms for renewal of the Channel 3 and Channel 5 licences, we will publish a statement and renew the licences in Q1 2024/25.	Statement and Licence Q1 2024/25

Project Details	Milestones
Channel 4 relicensing. Following our consultation, we expect to publish a statement on renewal of the Channel 4 licence in Q1 2024/25.	Statement Q1 2024/25
Responding to Channel 4 Corporation's annual Statement of Media Content Policy. We will publish our response to Channel 4 Corporation's statement on delivery of its remit and media content duties in 2023 and its plans to deliver them in 2024.	Report Q2 2024/25
Public Service Media (PSM) Review and related programme of work. As part of this we will report on PSBs' performance and delivery and how PSM can be maintained and strengthened in future. We will publish a document setting out the programme of work and timetable of the publications.	Scope of the review Q2 2024/25
PSB reforms. We will continue to work with DCMS on the proposals set out in the Media Bill during its passage through Parliament. Subject to that we will begin the implementation of its reforms to existing regulation and new obligations. This will include consultations on reform of the PSB quota system and PSB statements of programme policy, and updating our Guidance for the commissioning of independent producers.	Ongoing
Listed Events. We will issue a call for evidence (CfE) to gather stakeholder input ahead of a review of the Code on Sports and Listed Events.	Call for evidence Q2 2024/25 Q4 2024/25
Availability and Prominence. We expect to commence consultations on how we will exercise our duties in reporting to the Secretary of State on the designation of Television Selection Services (TSS) as well as our approach to the designation of PSB internet programme services.	Consultation Q3 2024/25
Video-on-Demand (VoD) programme services accessibility code. We will continue to work and will consult on the introduction of accessibility requirements for certain VoD programme services, as set out in the Media Bill.	Consultation Q4 2024/25
Video-on-Demand (VoD) standards regulation. We will be granted new powers and duties to draw up and implement a new VoD standards Code applicable to the largest VoD providers. We will also report to the Secretary of State on the state of the VoD market in the UK.	Report Q3 2024/25 Consultation Q4 2024/25
Commercial radio regulation reform. We will consult on new localness guidelines and implement a new regime for regulating local news provision on analogue commercial radio.	Consultation Q2 2024/25
Designated radio selection services. We will consult on how we will exercise our duties in reporting to the Secretary of State on the significance of use of radio selection services, prior to some of those services being designated by them as 'Regulated Radio Selection Services' (RRSS).	Consultation Q3 2024/25
Online News. We will continue our work to understand the impact of online news on media plurality. We will also conduct our triennial review of the Media Ownership Rules and publish our report, and any recommendations, to the UK Government.	Report Q3 2024/25

Project Details	Milestones
Local Media Review. We will undertake a review of the local media sector in the UK, looking at the provision, role and value of local media, including how providers are adapting to changing audience behaviours. We will publish the findings of our research on what audiences need and want from local media and set out how these needs are being met across the nations and regions of the UK.	Report and research Q3 2024/25
Local TV licence renewal. We will continue to work with DCMS following the completion of its consultation on the Local TV sector, and will complete the renewal of the service licences and the multiplex licence based on DCMS' preferred approach.	Ongoing
Small-scale DAB. We will continue to licence new small-scale radio multiplex services, with over 100 locations already awarded throughout the UK.	Ongoing
Designation of additional regulated Electronic Programme Guides (EPGs). We will continue to work with DCMS following its consultation on the regulation of additional EPGs, which may subsequently be required to be licensed by Ofcom.	Ongoing
Accessibility of TV and VoD services. We will continue to enforce requirements for broadcast access services (subtitles, audio description and signing) and publish information on accessibility for people with sight and/or hearing impairments. We will publish updated best practice guidance to help ensure that broadcasters and VoD services provide the highest quality access services possible.	Statement Q1 2024/25
Monitoring equity, diversity and inclusion in broadcasting. Our EDI data collection for 2024 will build on new data collection methods, and our annual publication will use this new data to report on EDI trends within broadcasters' workforces.	Report Q3 2024/25
Less healthy food and drink product advertising. We will continue to prepare for the new statutory restrictions on the advertising of less healthy food and drink products. The restrictions, which apply to TV, on-demand and online advertising, come into force in October 2025.	Ongoing
Future of TV Distribution. We will report to UK Government on the Future of TV Distribution to inform the UK Government's programme of work in this area.	Report Q1 2024/25
Connected TV Platforms. We will continue our work on content intermediaries, focusing on connected TV platforms, and their potential effects on competition and consumers.	Ongoing

We live a safer life online

Project Details	Milestones
Online safety programme. We will continue developing our regulatory approach and setting up our operations in preparation to regulate online services.	Ongoing

Project Details	Milestones
Developing and consulting on our regulatory approach to implementing the Online Safety Act. The OS Act was passed in October 2023 and we are taking steps to put key elements of the OS regime in place, including: Illegal harms (IH) consultation process to be completed and IH Codes and risk assessment guidance to be published by early 2025; and, Protection of children (PoC) consultation to commence in spring 2024 with view to Codes being published in 2025.	IH Statement Q3 2024/25 PoC Consultation Q1 2024/25
Building trust and awareness. We will focus on continuing to develop our relationship with the highest reach and risk regulated services and investing in providing a range of support for other services.	Ongoing
Transparency, user empowerment, and other duties on categorised services. Our final stage of implementation focuses on additional requirements that fall only on 'categorised services' and we will start our consultation on transparency requirements in 2024 and on Codes for categorised services in 2025.	Transparency consultation Q1 2024/25
Developing Ofcom's technical capabilities to support the design and implementation of the online safety regime. We will continue to work to build our understanding of how online services operate to inform the delivery of the online safety regime.	Ongoing
Video-sharing platform regulation. The VSP regime will be subsumed into the online safety regime and VSP legislation will be repealed. We are planning our approach and how we ensure a smooth transition from the VSP regime to the online safety regime.	Report Q3 2024/25
Making Sense of Media Programme. We continue our work in addressing media literacy challenges and the Online Safety Act brings additional specificity to our duties. We will consult on a strategy in spring 2024, which will reflect our revised duties and specific priorities.	Consultation Q1 2024/25 Statement Q3 2024/25

Enabling wireless services in the wider economy

Project Details	Milestones
Award mmWave spectrum (26GHz and 40GHz). We are preparing to run the award of mmWave spectrum at 26GHz and 40GHz to enable high-capacity wireless broadband. We will be awarding this spectrum in high density areas, reflecting on the nature of demand and the characteristics of the spectrum, but we will not commence the auction process until the Competition and Markets Authority has taken its decision on the proposed merger between Vodafone UK and Three UK.	Information memorandum Q2 2024/25
Enable future access to 1.4GHz. We will prepare to make additional 1.4GHz spectrum available for wireless broadband having cleared the band of existing fixed links users.	Consultation Q1 2024/25

Project Details	Milestones
Future use of upper 6 GHz. The upper 6GHz band is considered critical to enable growth for both Wi-Fi and mobile. We have been considering options for a hybrid approach to future use of the Upper 6GHz band (6425-7125MHz) that would enable both mobile and Wi-Fi to access the band on a shared basis. We will continue our work advocating for hybrid sharing and driving international studies (e.g. in CEPT) to better inform coexistence options and hybrid sharing models. We will publish a document towards the end of the year setting out further details on how we will make the band available in the UK.	Publication Q4 2024/25
Wireless broadband evolution and spectrum implications. We will continue to contribute to international discussions and studies, in light of WRC-23, in order to better understand potential demand for spectrum for next generation wireless broadband.	Publication Q3 2024/25
Engaging with industry and academia on spectrum sandboxes. We will build on the initial engagement with universities and industry players and continue to explore the potential for testing innovative solutions for more flexible and efficient spectrum sharing.	Ongoing
Impact of fibre roll-out and emerging technologies on future use of wireless fixed links. We will review responses to the call for input published in 2023/24 and consider implications with regards to our spectrum framework for fixed links in light of technology developments and increasing demand from other sectors.	Update Q1 2024/25
Enabling innovative satellite communication to support UK consumers and businesses. We are delivering the programme of work identified in our Space spectrum [strategy](#) to expand opportunities for satellite communications in the UK. We will continue our work to make more spectrum available for satellite gateways to support faster satellite broadband services for businesses and consumers. In light of technological developments that enable satellite transmission directly to mobile devices (D2D), we will continue our work to ensure our spectrum authorisation is fit for purpose. We will continue to engage internationally to develop regulations enabling NGSO satellite constellations and we will consult on changes to our Procedures for the Management of Satellite Filings, implementing recent updates to international regulations.	28 GHz gateways statement Q3 2024/25 Q/V/E band gateways publication Q3 2024/25 CFI on MSS/D2D Q1 2024/25 Satellite Filings Consultation Q3 2024/25
Licensing platform evolution. We will continue our programme of work to move our licences to a new platform, delivering greater automation and improving the licensee experience.	Amateur, Ships and CSR training schools migration to new licensing portal Q4 2024/25
WTA (Wireless Telegraphy Act) Licence simplification. In parallel to the evolution of our licensing platform we will also review and simplify our licensing processes.	Ongoing
Measuring background radio noise pollution. Reporting on our ongoing measurement campaign to quantify the background noise generated by our increased everyday use of electronic devices and understand its impact on spectrum users.	Report Q2 2024/25

Project Details	Milestones
Evolution of shared access licence framework. We will continue our work to enable access to spectrum to support innovation across a wider set of users in the 3.8-4.2GHz band.	Statement Q2 2024/25
Shared Rural Network compliance 2024. We will carry out targeted measurements to support our assessment of MNOs' compliance with their 2024 mobile coverage obligations, under the Shared Rural Network programme.	Report Q3 2024/25

Post

Project Details	Milestones
Monitoring the postal market and Royal Mail's performance. We will continue to monitor the impact of new guidance and obligations in the parcels market for the handling of complaints and treatment of disabled customers. We will also undertake enhanced monitoring of Royal Mail's efficiency progress and continue monitoring the long-term sustainability of the postal USO. We will continue to report on market data, consumer research and Royal Mail's financial & efficiency performance in our annual post monitoring report.	Report Q3 2024/25
Future development of the postal USO. We will consider input from stakeholders in response to our call for inputs on the future of the post USO and assess the options. We will publish an update in the summer.	Update Q2 2024/25

Cross-cutting projects

Project Details	Milestones
Connected Nations. We will continue to report on the availability and use of broadband and mobile networks in this annual update, which also features a version for each of the nations of the UK.	Updates Q1 & Q2 2024/25 Publication Q3 2024/25
Media Nations. We will publish our annual report on key trends in the television, video, radio and audio sectors, which also features a version for each of the nations of the UK.	Updates Q1 & Q2 2024/25 Publication Q3 2024/25
Online Nation. We will publish our annual report on what people are doing online and their attitudes to, and experiences of, using the internet.	Report Q3 2024/2025
Reporting on adults' media literacy. We will publish our annual Adults' Media Use and Attitudes report, looking at media literacy among UK adults. Alongside this, we will publish our annual Adults' Media Lives report, detailing the findings from our small-scale, longitudinal, ethnographic research.	Report Q1 2024/25

Project Details	Milestones
Reporting on children's media literacy. We will publish our annual Children's Media Use and Attitudes report and our annual Children's Media Lives report, detailing the findings from our small-scale, longitudinal, ethnographic qualitative research among children and young people.	Report Q1 2024/25
Reporting on pricing trends in communications services. We will publish our annual report that tracks the prices that consumers of telecoms and pay-TV services pay.	Report Q3 2024/25
News consumption. We will publish our annual research into people's use of and attitudes to news services across television, radio, print, and online.	Report Q2 2024/25
Developing our data function. Our work on data aims to set Ofcom up for success in making the most of data to support our policy functions and beyond.	Ongoing
Digital Regulation Cooperation Forum (DRCF). We will continue to work together with the CMA, the ICO and the FCA to support a coherent regulatory approach to online services and issues. This includes our joint horizon-scanning function, work on supporting the development of the UK Government's AI framework and setting up the DRCF's AI and Digital Hub pilot.	Ongoing
Understanding the impact of our work. We will ensure that our approach to policy appraisal follows best practice drawing on our revised impact assessment guidelines. We will continue to assess the impact of our work through our on-going programme of ex-post evaluations.	Ongoing
International engagement. We will continue our dialogue with international regulatory counterparts, governments, academics, and others to inform our work across all our sectors.	Ongoing
Horizon scanning. Ofcom's Horizon Scanning function looks to provide a systematic understanding of the biggest themes, technologies and trends that will impact our sectors and consumers in the next 5-10 years.	Ongoing

A3.   Impact assessments

A3.1   Ofcom has an obligation to carry out impact assessments to provide our stakeholders with a view of the options considered in making policy decisions and showing why the chosen option was preferred. We recognise that the decisions we make can deliver significant value for citizens and consumers but can also impose significant costs on our stakeholders. We therefore consider if our policy interventions are proportionate and appropriate during our consultation process.

A3.2   As reflected in Section 7 of the Communications Act, Ofcom must carry out impact assessments in cases where our conclusions would be likely to have a significant effect on businesses or the general public, or where there is a major change in Ofcom's activities. In the case of the Annual Plan of Work, we have not carried out an impact assessment as each policy and all related publications and work programmes contained in the Plan are impact assessed individually as appropriate.

A3.3   Section 149 of the Equality Act 2010 (the "2010 Act") imposes a duty on Ofcom, when carrying out its functions, to have due regard to the need to eliminate discrimination, harassment, victimisation and other prohibited conduct related to the following protected characteristics: age; disability; gender reassignment; marriage and civil partnership; pregnancy and maternity; race; religion or belief; sex and sexual orientation. We refer to groups of people with these protected characteristics as 'equality groups'. The 2010 Act also requires Ofcom to have due regard to the need to advance equality of opportunity and foster good relations between persons who share specified protected characteristics and persons who do not.

A3.4   Ofcom has separate but complementary duties under Northern Ireland's equality legislation.[14] This requires Ofcom to screen policies for their impact on equality of opportunity and/or good relations in each of the nine equality categories identified for Northern Ireland.

A3.5   To help us comply with our duties under the 2010 Act and the 1998 Act, we assess the impact of our proposals on persons sharing protected characteristics and in particular whether they may discriminate against such persons or impact on equality of opportunity or good relations.

A3.6   In this Plan of Work, we have set out the wide range of activities we will be undertaking in the coming year across our remit with the interests of citizens and consumers at their heart, including many areas that we expect to have a positive impact on equality groups. By way of example:

a) Our work on PSTN switch off and 2G/3G switch off will continue to focus on ensuring that vulnerable consumers are protected from harm during the migration to new technologies.

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[14] Section 75 of the Northern Ireland Act 1998

b) In our work on inflation-linked in contract price rises, we have identified that our proposal to ban such practices is likely to have a positive impact on consumers with a disability and financially vulnerable consumers.

c) In our work to implement the new duties in the Online Safety Act 2003, we have identified a range of ways in which our proposals are likely to have a positive impact on certain equality groups, in particular our Code of Practice proposals for Illegal Harms.

d) Our work under the priority outcome 'Media we trust and value' will continue to focus on, among other things, PSB content that reflects the diversity of the UK and that audiences, including equality groups, are protected from harmful content.

A3.7   Throughout the year, and across all of our work, we will continue to assess and explain how we are complying with our duties under the Equality Act 2010 and Northern Ireland Act 1998 adopting the approach set out in our Impact Assessments Guidance.