Ofcom's proposed plan of work 2021/22

Making communications work for everyone

Ofcom's proposed plan of work 2021/22 – Welsh overview

CONSULTATION:

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1. Chief Executive's foreword

Ofcom is the UK's communications regulator, with a mission to make communications work for everyone. We do this by serving the interests of people and businesses across the UK's nations and regions, through our work in mobile and fixed telecoms, broadcasting, spectrum, post and online. This consultation sets out our goals for the next financial year, and how we plan to achieve them.

We are publishing these proposals as the coronavirus continues to present challenges for the country. Throughout the pandemic, we have seen that high-quality, reliable communications services have been more important than ever to people's lives. We recognise the significant challenges posed by the coronavirus to the companies we regulate, and their efforts to meet them. As efforts continue to overcome the pandemic, we will seek to provide sensible, supportive regulation – while holding companies to account and ensuring they serve their customers and audiences to the best possible standard.

We want to ensure that investment continues in gigabit broadband and 5G mobile networks, so that more people have access to high-quality, secure networks – including in rural areas. We will also ensure that customers are treated fairly by their providers.

The broadcasting sector sits at the heart of the UK's creative industry. We will continue to support its efforts to meet the challenges of viewers and listeners moving online. Those audiences also need to feel safe and be able to trust what they see and hear, as they do on TV and radio.

As the communications landscape keeps evolving, Ofcom needs to keep pace. We are investing in our skills, innovating the way we work and building a more diverse workforce that reflects the whole of the UK.

We are consulting on this plan of work to encourage discussion with companies, governments and the public. We'll also be hosting several virtual events for people to feed in. Whatever your thoughts, and wherever you are, we're keen to hear from you.

Dame Melanie Dawes, Chief Executive

2. Executive Summary

This year has highlighted the importance of communications services

2.1 Through the course of this year, as the country has dealt with the coronavirus (Covid-19) pandemic, it has become clear that the communications sectors have never been more important to people and businesses. The impact of the pandemic has been widespread, and our sectors have met significant challenges to keep the UK connected.

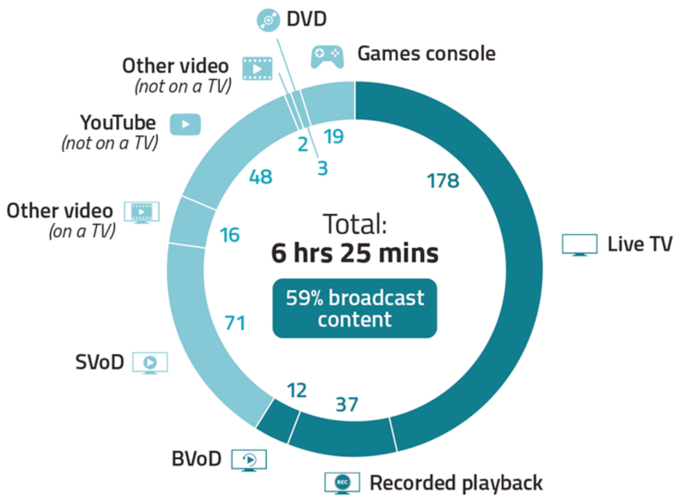
2.2 During periods of lockdown, access to the internet became increasingly important for a wide range of activities including home working, remote learning, medical appointments, online exercise classes and accessing key public services. Online stores and the UK's delivery networks have provided essential goods and have been a lifeline, particularly to people who are more vulnerable. Our social lives became virtual, with quizzes, family gatherings and concerts being streamed into our homes. Reliable broadband has also kept the nation productive with many organisations moving their employees to remote working. All of this served to drive record levels of traffic across the UK's fixed and mobile networks.

2.3 TV and radio have also played a key role throughout this year, keeping people entertained and also providing accurate news which has been critical through the pandemic, reaching record audiences. They have also helped to educate children through resources such as BBC Bitesize during times when parents and teachers alike needed to support remote learning. While this was reflected in huge audiences for both broadcast and on demand content, advertiser funded services faced the challenge of major falls in revenue.

2.4 We recognise that people's use of communications services is changing rapidly, and with it the role of the communications sectors in the UK. As we set out Ofcom's priorities for the year ahead, we detail our work to address the challenges we face in the here and now, as well as looking forward to help shape our sectors for the needs of the future. We remain sensitive to the ongoing uncertainty we all continue to experience through the pandemic. We will continue to be vigilant and flexible, in order to respond promptly to the events and challenges faced by people, businesses and our stakeholders in the UK.

As services move online the reliance on communications is growing

2.5 Even before the pandemic, people's communication habits were changing, with an increasing choice of online services and content, and more ways to access it. Services are increasingly moving, and growing, online, whether we're watching content on BBC iPlayer, shopping on Amazon, sharing pictures on WhatsApp or paying a tax bill on GOV.UK. People spend around three and a half hours online a day on smartphones, tablets and computers alone – and over an hour watching online services on a TV. We are also increasingly accessing online services through a growing range of devices, with more than a fifth of UK households now owning a smart speaker such as a Google Nest or Amazon Echo device. [1]



Average minutes of viewing per day in April 2020: all individuals, all devices[2]

2.6 As people spend more time on a growing variety of activities online, the demand for some traditional services has fallen significantly. As the use of video-on-demand (VoD), and particularly subscription video-on-demand (SVoD) services has grown, the viewing of linear TV channels has decreased. However, during the pandemic all forms of viewing increased. In April 2020 viewers were watching up to 6 hours and 25 minutes of audio-visual content per day, an hour and a half more than in 2019. This drove growth for both broadcast TV (up by 32 minutes year-on-year) and on demand viewing with subscription video-on-demand (SVoD) services such as Netflix (up by 37 minutes year-on-year), partly driven by an estimated 12 million UK adults adopting new video streaming services during lockdown. [2]

2.7 In the telecoms sector, SMS text messaging and voice calls are being overtaken by newer services such as WhatsApp, Zoom and FaceTime, which offer better functionality and an improved user experience. In the postal sector people continue to send fewer letters with a 28% reduction in addressed mail in the first six months of this financial year, likely accelerated by the pandemic, but parcel volumes have flourished driven by an accelerated rate of online shopping during the pandemic. [3]

2.8 The use of communications by businesses is also rapidly evolving. Office-based working is being transformed as organisations and their employees use online communication tools such as Zoom and Microsoft Teams to develop more flexible ways of working. With

[1] https://www.ofcom.org.uk/research-and-data/multi-sector-research/cmr/cmr-2020
[2] https://www.ofcom.org.uk/research-and-data/tv-radio-and-on-demand/media-nations-reports/media-nations-2020
[3] https://www.ofcom.org.uk/__data/assets/pdf_file/0022/208219/2019-20-annual-monitoring-update-postal-market.pdf

convergence across fixed and mobile networks allowing flexibility for businesses to operate in new, more efficient ways, workers can experience the same levels of connectivity whether they are in or out of the office. Sectors such as manufacturing and agriculture are increasingly seeing greater automation, using wireless technologies to improve efficiency and productivity.

There are strategic challenges for networks…

2.9 Being able to get online at home and on the move is crucial for people in all parts of the UK so investment in the latest technologies, including full fibre and 5G, is increasingly important to meet their needs. As investments are made, alongside the availability of these newer technologies, we want to see universal access to decent broadband and mobile coverage across the UK. As the pandemic has demonstrated the importance of being able to get online, it has also highlighted the challenges for those who cannot get a connection – either because it's not available where they live or because they can't afford it.

2.10 Superfast broadband and 4G networks are available to 95% and 97% of UK homes respectively, and since January 2020, the availability of full fibre broadband to UK households has grown by 670,000 to 4.2 million. Mobile operators are rolling out the Shared Rural Network (SRN) which will take 4G to 95% of the UK's landmass by 2025, and 5G roll-out will continue in the coming year providing the groundwork for future innovation and an increasingly connected world. For broadband, the Universal Service Obligation (USO) gives people the right to request a decent, affordable connection.[4]

2.11 This growth in high capacity, resilient network infrastructure was tested by the dramatic increase in bandwidth used by people and businesses during lockdown. In November the UK's networks faced new peaks of internet traffic, with 18Tb being downloaded per second via the Openreach network.[5] Through this period the UK's networks remained resilient and continued to serve the needs of people across the UK.

…and opportunities for the services that run on them

2.12 Consumer devices are also advancing, with more widely available and more affordable devices enabling access to new technologies such as 5G. This paves the way for the growth of new technologies that can deliver increased speed, reliability and lower latency. Exciting advancements such as artificial intelligence, with algorithms that can learn and adapt themselves, telecoms networks becoming increasingly software-based and therefore more flexible, and increasingly connected homes are all enabled by these technological improvements. These technologies open the door to the next generation of products and services, which not only have the potential to dramatically change the way we live and

[4] https://www.ofcom.org.uk/phones-telecoms-and-internet/advice-for-consumers/broadband-uso-need-to-know
[5] https://newsroom.bt.com/keeping-customers-connected-in-lockdown-and-beyond/

work but also offer a significant opportunity for improved productivity and economic growth.

2.13 These new products and services are driving a shift away from traditional linear broadcast TV towards on demand content. The landscape of content creators, aggregators and platforms has become more complex and while unprecedented choice and greater breadth in professional and user generated content has brought huge benefits, it also means that audiences have become, and will continue to be, more fragmented. Traditional broadcasters need to innovate in terms of the type of content produced and the ways in which it is distributed to compete with newer competitors. UK broadcasters have faced tough competition from global tech giants and this year the pandemic brought unprecedented challenges for advertising revenues and production. Public service broadcasting needs to evolve in the face of these challenges so that it can continue to provide content which is valued by audiences and reflects UK lives. Our review of public service broadcasting will make recommendations on how it could be redefined as public service media for the digital age.

2.14 The evolution goes further than the substitution of established consumer-facing services. These new online products are often elements of broad ecosystems of complementary services. The tech giants offer services across hardware and software in areas such as wearables, smart home, gaming and virtual reality. They are now using these services to increase their presence in different ways across the sectors we regulate. For example, in cloud computing - which is increasingly used by fixed, mobile and broadcast network providers - Amazon, Microsoft and Google are the biggest suppliers. The dynamic and converging nature of our sectors highlights the need for business models to adapt and for rapid innovation in the face of agile new competitors.

We want to support innovation while protecting consumers

2.15 As businesses adapt, our regulation needs to support an environment where they can continue to invest in new technologies, programming and infrastructure. This is crucial to successfully meet the growing and changing needs of consumers now and into the future. Our sectors make a major contribution to the UK economy and we want to make sure they continue to do so as they deliver for people across the UK.

2.16 Through all this change, our work protecting consumers is as important as ever. Whether it is trying to find the right deal or switching between providers, people and businesses should be able to trust that markets operate with integrity. The protection of vulnerable people and those who are having difficulty paying for communications services will be a major challenge for the industry, particularly against the backdrop of a very uncertain economic outlook in the coming year. The UK’s biggest broadband, phone and pay-TV companies have committed to put fairness at the heart of their business and we will continue to work with companies across the communications sectors to promote fairness for all customers and to help protect those who are vulnerable.

2.17 Our vital spectrum work will continue to enable and protect services that we rely on, making sure legitimate users get access to the UK's airwaves. This work helps to support the emergency services, astronomy, space science, defence, aeronautical and maritime users alongside TV and radio broadcasts and the latest mobile technology, among others.

2.18 Protecting people will also be at the heart of our broadcasting and online work. Protecting audiences from harm on TV and radio is a central part of Ofcom's work, and as those audiences shift to online services, we will need to sharpen our focus on a wider range of services, such as on demand programme services. We will fulfil our new duty to ensure UK-established video-sharing platforms (VSPs) take appropriate measures to protect children from content that may be harmful to them, and to protect the general public from criminal content and material likely to incite violence or hatred. We will also prepare for a potential broader role protecting people from online harms under the Government's proposed online harms regime.

We also need to evolve the way we work to meet these challenges

2.19 The breadth and rate of the change in the sectors we regulate highlights the need for Ofcom to keep pace. As we balance the protection of consumers with the importance of making sure businesses can invest, innovate and build for the future, we will ensure that our approach to regulation reflects the rapidly changing environment. This will require us to invest in our digital, data and technology skills so we can continue to engage with our rapidly evolving sectors. We will support this by fostering a diverse and inclusive workforce, enabling us to attract the best talent the UK has to offer. As our sectors face broad challenges, we will also look to stimulate debate in emerging areas of interest, through our economic and technology publications.

2.20 Ofcom is one part of the regulatory and policy landscape, so we are actively strengthening our partnerships and working collaboratively with industry, governments, academia and others to consider issues that we jointly face. As examples of this we will continue to strengthen our partnership with the Information Commissioner's Office (ICO) and the Competition and Markets Authority (CMA) through the Digital Regulation Cooperation Forum (DRCF), where we are working together to make online services work well for everyone.

2.21 We are setting out our strategic themes and believe that the priorities in this plan of work will make sure Ofcom plays its part in addressing the challenges for people and businesses in the UK today, and in the future.

Our strategic priorities for the next financial year

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

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

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

3. Our goals and priorities for 2021/22

3.1 Ofcom's purpose is to make communications work for everyone. Our duties are set out in a number of Acts of Parliament. Our principal duty is to further the interests of citizens and consumers in relation to communications matters, where appropriate by promoting competition. You can read more about our statutory duties in section 4.

3.2 The Government has set out its policy priorities in relation to telecommunications, the management of radio spectrum and postal services in its Statement of Strategic Priorities (SSP).[6] Ofcom must have regard to the SSP when exercising its regulatory functions. We have had regard to the SSP when developing this plan of work, as summarised below:

- **World-class digital infrastructure**. We are carrying out a range of work under the theme 'Investment in strong, secure networks'. This is aimed at promoting competition and investment in new networks and the use of spectrum for the benefit of people and businesses. We share the Government's commitment to world-class digital infrastructure for the UK, and our work takes account of the conclusions of the Government's Future Telecoms Infrastructure Review.[7]
- **Furthering the interests of telecoms consumers**. The Government's commitment is to safeguard telecoms consumers' interests, including those who are vulnerable or less engaged. Under the theme 'Fairness for Customers' we have work which addresses issues such as switching, pricing, and the use of consumer data that directly supports these outcomes.
- **Secure and resilient telecoms infrastructure**. Our work under the theme 'Investment in strong, secure networks' directly supports Government's commitment to ensuring the UK's telecoms networks and services are secure and resilient.
- **Postal services**. Our ongoing work in 'Getting Everyone Connected', includes understanding postal users' needs and reviewing whether regulation of the sector needs to change in light of market changes.

3.3 We set out the priority work areas for the year and our ongoing work below. This includes details and important milestones of the most relevant projects. Our wider plan of work, including these highlighted areas of work, can be found in Annex 2.

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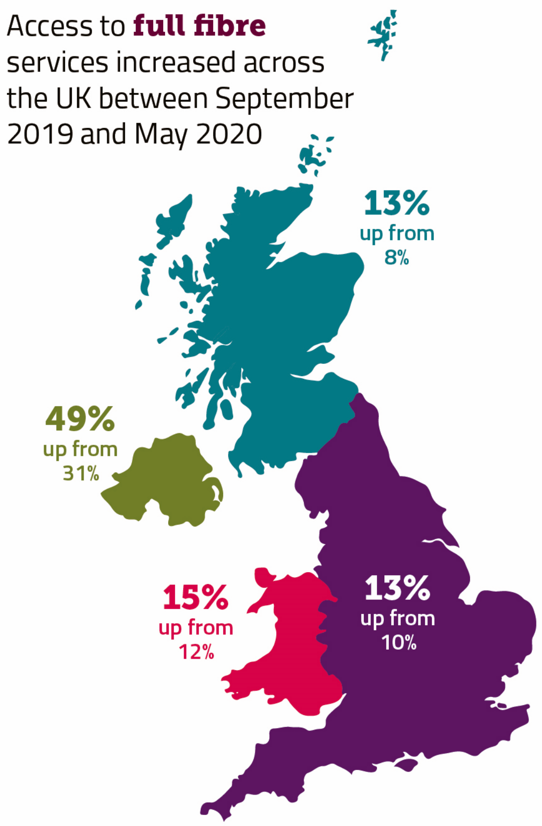
[6] https://www.gov.uk/government/publications/statement-of-strategic-priorities
[7] Future Telecoms Infrastructure Review - GOV.UK (www.gov.uk)

Strategic priorities

Investment in strong, secure networks

3.4 Connectivity for UK consumers is crucial to helping people and businesses communicate, to get information and be entertained. This has particularly come to the fore during the coronavirus pandemic. Over the last nine months communications companies have come together to support the public and the economy, and help keep the nation connected. They have worked to make sure the UK's networks are resilient, and that people continue to have access to the services they need - despite significant challenges.



3.5 The resilience of UK communications networks is due in part to continued investment in mobile and fixed broadband infrastructure. Ninety-five percent of UK homes can now access superfast broadband (download speeds of at least 30Mbit/s) and, in May 2020, 14% of homes had access to full fibre broadband, reflecting investment in existing and new fibre networks.[8]

3.6 Our increasing dependency on communications services makes it imperative that networks are reliable and secure. We want to encourage communications companies to make sure their networks are strong, secure and protected in the face of potential outages and cyber-attacks.

[8] https://www.ofcom.org.uk/__data/assets/pdf_file/0017/202571/connected-nations-summer-update-2020.pdf

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

Mobile strategy. We will develop a strategy for the sector that will underpin our future regulation and support the delivery of high-quality connectivity and innovation. We are currently considering the development of this work and we will be able to say more in our final plan of work in March.

Telecoms security framework implementation. We will continue to work with the Government to implement telecoms security legislation, working with industry, to make sure they adhere to their security obligations.

3.8 Alongside the key priorities outlined above we have an ongoing work programme designed to ensure that consumers and businesses have the communications networks that they need. Our ongoing work under this theme includes:

- **Promoting fibre roll-out**. Investment in fibre will remain a key area of focus for us. With our wholesale telecoms fixed access market review concluding in March 2021 we will continue to promote fibre deployment through our work ensuring access to Openreach's ducts and poles, supporting the take-up of higher-speed services and preparing for the retirement of the copper network, alongside our broader engagement work with a range of stakeholders including investors.
- **Effective Openreach reform**. We will continue to monitor how the legal separation of Openreach from BT in 2017 is working in practice. We will produce our next annual monitoring report on progress during 2020 and will reflect on the appropriate timing to conduct a broader strategic review on whether the arrangements are delivering the outcomes intended by the Strategic Review of Digital Communications.[9]

[9] Initial conclusions from the Strategic Review of Digital Communications. Ofcom, 25 February 2016.

Getting everyone connected

3.9 Being connected has never been more important. The vast majority of UK properties can now access decent broadband (at least 10Mbit/s download and 1Mbit/s upload speed). The 189,000 properties without access to this might be eligible for the broadband universal service, which gives the legal right to request a decent broadband connection.[10] Provided the cost of a connection is less than £3,400, it will be provided without additional contributions from the customer.

3.10 In March, the UK Government announced funding for the 'Shared Rural Network' (SRN) being built by the four mobile network operators (EE, O2, Three and Vodafone). The SRN will improve mobile coverage across the UK, particularly in rural areas.[11]

3.11 Getting everyone connected doesn't just relate to the broadband services we use at home and the mobile services used across the country, but also for how we communicate and connect with each other using postal services. We will continue our work to ensure that our regulation adapts in line with changes in the postal market and that the future sustainability of the universal postal service is secured. We will consider the impact of the accelerated decline in letter volumes experienced over the last two years with volumes falling by 3.9%, from 10.4 billion in 2018/19 to 10 billion in 2019/20. Parcel volumes, however, have seen a dramatic increase driven by the growth in online commerce by 8% to 2.8bn items in 2019/20. The coronavirus pandemic has further fuelled the demand for parcel delivery with Royal Mail reporting a 31% increase in volumes in the first six months of 2020/21 and many parcels operators expanding capacity in their networks.[12]

[10] https://www.ofcom.org.uk/__data/assets/pdf_file/0017/202571/connected-nations-summer-update-2020.pdf
[11] https://www.gov.uk/guidance/building-digital-uk
[12] Review of postal users' needs: 2020 report (ofcom.org.uk)

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

- **Broadband universal service**. The broadband Universal Service Obligation (USO) was launched earlier this year and we will continue to monitor its delivery by the designated providers (BT and KCOM). We will also need to consider any funding claims for the connections that have been built. Alongside this, we are continuing our work to improve access to broadband services in the hardest to reach locations, while seeking to understand how people's connectivity needs will evolve in future.
- **Mobile coverage**. We will continue to report on progress made to improve coverage under the Shared Rural Network programme.
- **Progress our review of the future of postal regulation**. During 2019/20 we started work on the future of postal regulation. This work includes a review of the sustainability of the universal service, the efficiency of Royal Mail's network, the effectiveness of competition in the letters and parcels market, and the extent to which customers benefit from adequate protections in the market. We will also complete our research into the needs of postal users to inform our views on how regulation needs to adapt.

3.13 We will also continue our work on services that continue to be important for many, including:

- **Moving to digital lines**. As voice calls are increasingly carried via broadband, we will continue our work to make sure people are protected through the migration.
- **The future of 2G/3G networks.** We will continue our work to understand the impacts of future plans for 2G/3G switch off, in order to protect customers and minimise disruption.
- **Allocating and managing telephone numbers**. Ofcom ensures the efficient use of telephone numbers which we allocate to telephony providers.
- **Legacy universal services**. We will continue our review of legacy universal service obligations, including public call boxes, itemised billing and printed directories.

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

Ofcom's spectrum work

Ofcom has a duty to maintain effective use of the UK's airwaves. This work supports a wide range of organisations and individuals in areas such as programme making and special events (PMSE), business radio, amateur radio, the emergency services, and satellite, as well as in the maritime and aeronautical industries. Our major spectrum-related projects - such as our current 700 MHz/3.6-3.8 GHz band auction - are also crucial to supporting other aspects of Ofcom's work, notably in the mobile, and TV and radio broadcasting sectors. Given the rapidly evolving demand for spectrum, we look to put innovation at the heart of our support for the sectors that we work with. Our ongoing work in this area includes:

- **Authorising spectrum and assuring correct and compliant use**. We provide advice and assistance to a range of spectrum users. This includes carrying out detailed technical analysis and real-world measurements to optimise the use and sharing of spectrum. We license and monitor for non-compliant use of spectrum. We investigate reports of harmful radio interference, resolving where possible and enforcing where necessary. We carry out market surveillance to prevent the sale or use of non-compliant equipment.
- **Analysing and releasing information on spectrum use**. We release spectrum information in an open format so stakeholders can better understand how spectrum is used. We also analyse the use of spectrum to inform policy.
- **Managing spectrum and planning for future requirements**. As part of our work to ensure the efficient use of spectrum we consider the evolving needs of existing users and the future demand for innovative wireless services.
- **Enabling wireless innovation across a variety of industry sectors**. We support digital transformation in industry, from understanding the needs of the energy sector, to enabling the use of drones for logistics. Our objective is to make sure different businesses and organisations can access the spectrum they need, where and when they need it.
- **Working with international organisations**. To continue to be a global authority and leader on spectrum and its management, we will work internationally, representing the UK's needs and objectives. We will also participate in (and chair) relevant international groups including within the European Conference of Postal and Telecoms Administrations (CEPT) and the International Telecommunication Union (ITU) on sector specific and general spectrum issues.

Fairness for customers

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

44% of vulnerable customers have been out-of-contract for at least two years compared to **37%** for all customers

3.16 We have taken action to make sure customers are treated fairly and we continue to challenge companies to do more. The pandemic has highlighted just how important communications companies are for the UK, but its long-term effects are likely to create significant financial uncertainty for many businesses, families and individuals. We are conscious of the ongoing need for affordable services, particularly for those who also have other vulnerable circumstances. These challenges highlight the importance of phone, broadband and pay-TV companies treating their vulnerable customers fairly.[13]

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

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

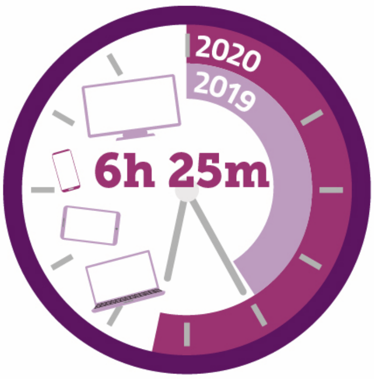
[13] https://www.ofcom.org.uk/about-ofcom/latest/media/media-releases/2020/vulnerable-customers-must-be-treated-fairly

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

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

Supporting and developing UK broadcasting

3.19 The pandemic has highlighted the importance of UK broadcasting in providing content which is valued by audiences and reflects the lives of people in the UK. It has also created significant financial uncertainty for the TV industry, with commercial broadcasters experiencing major falls in advertising revenue. We published information for broadcasters throughout the year, keeping them up to date with guidance relating to our regulatory approach during the pandemic. We will continue to work closely with broadcasters to understand the operational and financial difficulties they continue to face, and we remain committed to fulfilling our regulatory role with pragmatism and flexibility.



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

3.20 The restrictions put in place because of the pandemic have affected our media habits and have particularly accelerated the growth in viewing of online video. Use of subscription video-on-demand (SVoD) services such as Netflix and Disney+ increased from 53% of households in Q1 2020 to 60% in Q3. While the majority of UK viewing is still on live broadcast TV, this varies significantly by demographic, with 16 to 34 year-olds spending only a quarter of their video-watching time on live TV. [14] The overall viewing of broadcast television increased during the first UK lockdown period, although it reverted to the trend of year-on-year decline by June once some restrictions had been lifted. When stricter restrictions started to come into place again across many areas of the UK in October, broadcast viewing once again increased to higher levels than the previous year.

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

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

- **Small Screen, Big Debate**. Public service broadcasters (PSBs) are the cornerstone of the UK media sector.[15] They are a trusted source of news and current affairs and produce a wide range of original UK content. We are currently reviewing the future of public service broadcasting in light of changing audience habits and fast-developing markets. Our review - 'Small Screen: Big Debate' – will conclude in 2021/22. We are building on our assessment of PSB performance over 2014-2018,[16] by considering what audiences want from public service media over the next five to ten years, how it might be delivered, and how its sustainability may be assured. We have engaged widely, including through a programme of audience research and our conference in October 2020. We are currently consulting on options for the future of public service media, after which we will provide our recommendations to the Government.
- **Diversity in broadcasting**. Increased diversity in television and radio is an important priority for Ofcom. We expect broadcasters to address critical areas of under-representation, including disabled people across industry and people from minority ethnic groups in more senior, decision-making roles.[17] We want broadcasters to gain a better understanding of socio-economic and geographic diversity in order to target their efforts more effectively, and expect those in broadcasting leadership roles to take accountability for delivering real change. We will support these efforts through continued monitoring and widespread engagement, together with a new forum for collective action by broadcasters.

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

[15] BBC, ITV and STV, Channel 4, Channel 5 and S4C.
[16] https://www.ofcom.org.uk/__data/assets/pdf_file/0013/192100/psb-five-year-review.pdf
[17] https://www.ofcom.org.uk/__data/assets/pdf_file/0022/207229/2019-20-report-diversity-equal-opportunities-tv-and-radio.pdf

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

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

- **Setting and enforcing content standards**. Ofcom is the post-transmission regulator for content standards on TV and radio broadcast channels, which must comply with the Broadcasting Code.[18] We are also the content regulator for video-on-demand services in the UK. This work has been critical this year, notably in helping to protect audiences from potentially harmful content about the pandemic. We will continue to take robust enforcement action against services that broadcast incitement to crime and hate speech, including revoking the broadcaster's licence where appropriate. We ensure that the BBC's TV channels, radio stations and BBC iPlayer comply with the Broadcasting Code. We also have an oversight role in relation to the content of BBC websites.[19] We consider BBC-related complaints as part of the 'BBC-first' process where a complaint can be brought to Ofcom if the complainant is not satisfied with its resolution by the BBC.
- **Licensing TV and radio broadcast services**. We will continue to issue, manage and maintain licences for all national and local commercial TV, and radio services. We can impose penalties when licence requirements are not complied with and, in serious cases (as noted above), revoke licences.
- **Monitoring how commercially funded, public service broadcasters fulfil their remits.** We will publish our response to Channel 4 Corporation's delivery of its media content

[18] https://www.ofcom.org.uk/tv-radio-and-on-demand/broadcast-codes/broadcast-code
[19] Unlike our role regulating the standards of BBC broadcasting and on-demand programme services, Ofcom has no enforcement powers for BBC online material. Rather, our role is to consider and give an opinion on whether the BBC has observed the relevant editorial guidelines in its online material (e.g. online text articles).

duties and plans for the following year as set out in its statement of media content policy.

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

Preparing to regulate online harms

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

3.24 People are increasingly spending more time online and using online services for an ever-growing range of purposes. The average time spent online on smartphones, tablets and computers grew by 17 minutes in 2019, with UK adults spending three and a half hours online on them each day. The pandemic has accelerated this trend, driving adults to spend more than four hours online on these devices each day. Online services are becoming increasingly important sources of news, with almost half of online adults using social media as a news source in 2019 and 78% of online adults using BBC services for news specifically about the coronavirus pandemic in March 2020.[20] The importance of being online during this time was demonstrated further by the growth in reach of education, health and government sites as the country entered a nationwide lockdown period.

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

3.26 The UK Government has given Ofcom new duties as the regulator for UK-established video-sharing platforms (VSPs) through the transposition of the European-wide Audiovisual Media Services Directive. VSPs are a type of online video service where users can upload and share videos with members of the public, such as YouTube and TikTok. Ofcom will not be responsible for regulating all VSPs as our duties only apply to services established in the UK and as such, we anticipate that a relatively small number of services fall within our jurisdiction. Under the new regulations, which came into force on 1 November 2020, VSPs must have appropriate measures in place to protect children from potentially harmful content and all users from criminal content and incitement to hatred and violence. VSPs will also need to make sure certain advertising standards are met.

[20] https://www.ofcom.org.uk/research-and-data/tv-radio-and-on-demand/news-media/coronavirus-news-consumption-attitudes-behaviour
[21] https://www.ofcom.org.uk/research-and-data/internet-and-on-demand-research/online-nation

3.27 As well as appointing Ofcom as the regulator of UK-established VSPs the Government has announced that it is minded to appoint Ofcom as the future regulator responsible for protecting users from harmful online content. With this in mind we are undertaking the following work:

- **Video-sharing platforms regulation**. We have issued a short guide to the new requirements.[22] On 19 November 2020 we issued draft scope and jurisdiction guidance for consultation to help providers self-assess whether they need to notify to Ofcom as a VSP under the statutory rules from April 2021.[23] We will also consult in early 2021 on further guidance on the risk of harms and appropriate measures as well as proposals for a co-regulatory relationship with the Advertising Standards Authority (ASA) with regards to VSP advertising. We intend to issue final versions of the guidance in summer 2021.
- **Preparing for the online harms regime.** The UK Government has set out that it intends to put in place a regime to keep people safe online. In February 2020 it published an initial response to the 2019 White Paper[24] setting out how it intends to develop the regime which stated that it was minded to appoint Ofcom as the future regulator of online harms. If confirmed, these proposed new responsibilities would constitute a significant expansion to our remit, and preparing for them would be a major area of focus in 2021/22. We will continue to provide technical advice to the UK Government on its policy development process, and we will engage with Parliament as it considers legislative proposals.

3.28 Given our responsibilities for VSPs and on-demand programme services and in order to prepare for potential new online duties, we are committed to deepening our understanding of the wider online ecosystem and sharing our knowledge with consumers, industry and governments.[25] Our internal work in this area is discussed below under 'Strengthening Ofcom for the future' and further discussions of the partnerships we will explore to maximise the impact of online regulation are discussed below under the 'Developing strong partnerships' priority.

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

- **Our Making Sense of Media programme.** This programme will continue to provide insights on the needs, behaviours and attitudes of people online. Our other initiatives to research online markets and technologies will further our understanding of how online harms can be mitigated.
- **Stepping up our collaboration with other regulators**. As discussed in the 'Developing strong partnerships' section, we will continue our joint work through the Digital

[22] https://www.ofcom.org.uk/__data/assets/pdf_file/0021/205167/regulating-vsp-guide.pdf
[23] https://www.ofcom.org.uk/consultations-and-statements/category-2/video-sharing-platforms-notifying-ofcom
[24] Online Harms White Paper - GOV.UK (www.gov.uk)
[25] On-demand programme services (ODPS) includes tv catch-up services such as BBC iPlayer and ITV Hub.

Regulators Cooperation Forum and strengthen our collaboration with regulators around the world who are also considering online harms.

- **Researching online harms**. We will explore the potential to use existing and new quantitative techniques to assess the prevalence and sources of online harms, as well as the effectiveness of measures taken to protect users. We intend to explore a range of analytical tools, including the analysis of data and information provided by online services, as well as conducting consumer research (including behavioural insights).
- **Understanding VSPs**. The introduction of regulation to UK-established VSPs will provide a solid foundation to inform and develop the broader future online harms regulatory framework. This interim regime is more limited in terms of the number of regulated companies and will cover a narrower range of harms compared to the online harms white paper proposals. However, should Ofcom be confirmed as the regulator, through our work on VSPs we will develop 'on-the-job' experience working with newly regulated online services, developing the evidence base of online harm, and building our internal skills and expertise.
- **Online business models**. Understanding online business models, competitive dynamics and how they interact with online harms will be key to future online regulation. Following on from the CMA-led Digital Markets Taskforce, we will continue to engage with the Government as it considers the taskforce's advice on a pro-competition regime for digital markets and works to establish a Digital Markets Unit within the CMA.

Underpinning our wider work

3.30 Our programme of policy work is underpinned by work in a number of important areas and specific programmes.

- **Market research and intelligence**. All our work is underpinned by our understanding of the markets we regulate. We share the insights gained from our work to understand these markets and how UK consumers engage with them through our suite of market intelligence and research publications. We research communications markets and consumer preferences and behaviour to provide an up-to-date, thorough understanding of consumers and businesses in the markets we regulate. We have adopted new, innovative, methods of research through our VSP panel and our behavioural insights programme. We combine this research with data collected directly from industry stakeholders and, through publications and interactive reports, make it available and accessible to a wider audience. This includes our three main publications: Connected Nations, Media Nations and Online Nation.
- **The Information Registry**. Established in June 2020, the Information Registry supports our vital information-gathering activities by coordinating formal information requests and working with stakeholders to provide greater visibility on the timing of our planned requests. We will continue to develop the Information Registry to embed and improve ways of working to deliver real and tangible efficiency improvements to our information gathering practices, reducing burdens on our stakeholders where possible.
- **Enforcement**. Where appropriate, we will use our enforcement powers to pursue enforcement cases which support and promote these policy priority objectives in a timely and effective manner and which help foster a strong culture of compliance across all our sectors and ensure that consumers are protected from harmful practices.
- **Innovation**. We want to foster an environment where innovation flourishes, both in the sectors we regulate and within Ofcom. To achieve this, we will work to develop a deep understanding of innovation in our sectors and seek opportunities to facilitate greater innovation in the markets we regulate and beyond. In partnership with Digital Catapult, we will launch the SmartRAN Open Network Interoperability Centre (SONIC). Existing and emerging suppliers of open network equipment will be able to test and demonstrate interoperability ahead of integration into operator networks. We will continue to analyse how our industries affect the environment, and are affected by it, and what actions can be taken to tackle the challenges presented by climate change. We will also establish a behavioural hub to bring together specialists from across Ofcom to deepen our understanding of how consumers make decisions.
- **Evaluating the impact of our work**. Understanding the impact of our regulation on consumer outcomes is an important aspect of ensuring that we are delivering for people in the UK. We will continue to assess the impact of our work as part of our 2021/22 work programme and through our programme of ex-post evaluation we intend to publish an in-depth review of our non-geographic numbering policy.

3.31 In addition to the work related to the five themes we set out above, we will also be taking steps to ensure that we are well positioned to carry out our duties both now and in the future. This work is set out below.

Strengthening Ofcom for the future

3.32 With the increased use of online services and as our sectors continue to change rapidly, Ofcom needs to keep pace. As we assume duties in new areas - such as regulating VSPs and in relation to telecoms security - it is important that we evolve our skills and working practices and make sure that our workforce reflects people and perspectives from across the whole of the UK.

- **Our diversity and inclusion programme will drive innovative, creative and agile thinking.** We will be most effective at working in the interests of people across the UK if we are a confident and connected organisation where everyone feels part of the whole. It is essential that, as an organisation, we have a broad range of backgrounds and experiences, reflecting those of the people of the UK. In the coming months we will set out our diversity and inclusion strategy for the next five years which will include new workforce diversity targets. In July we will report on our progress against our 2020 diversity targets in our annual report and accounts.
- **Invest in our skills and capabilities in digital markets, online technologies and data analytics**. In the coming year as we develop our regulation of VSPs, and potentially the broader online harms regime, as well as contributing to the development of a digital markets regime, we will continue to equip our people with the skills, training and tools they need to carry out our enhanced duties.
- **Strengthen our understanding of the commercial priorities and incentives of the businesses and markets we regulate now and in the future**. Having a deep commercial understanding of the markets we regulate is imperative to carrying out our duties as a regulator. We will focus on these capabilities by recruiting colleagues with commercial experience, using secondments, and continuing our programme of commercial and consumer research.

Developing new partnerships

3.33 So that we can continue to learn from, and exchange best practice with, other organisations, we will continue to build relationships with regulators, businesses and governments in the UK and around the world. Through these partnerships and relationships we will seek to improve our understanding of our sectors and the ways in which we can serve UK consumers.

3.34 We support the Government's desire for continued effective regulation, delivered through close collaboration with domestic, European and other international partners. In the UK this will include a range of work.

- **Engaging with our media literacy partners**. Working with our, Making Sense of Media panel and network we will seek to understand consumer experiences, share best practice, and evaluate media literacy activities.
- **Continuing our joint working with the CMA and the ICO through the Digital Regulation Cooperation Forum (DRFC)**. The DRCF aims to support effective cooperation between its members, enabling coherent, informed and responsive regulation of the UK digital economy which serves citizens and consumers. During 2021, the DRCF will work with the Government as it seeks to ensure adequate coordination, capability and clarity across the digital regulation landscape.
- **UK Regulators Network (UKRN).** We work with other UK regulators to address common challenges across different sectors and to share best practice as a member of the UKRN. We will continue to contribute to joint policy work with the UKRN to improve outcomes for vulnerable consumers during the course of this year.

3.35 We will also continue to invest in our international relationships across the sectors we regulate. Our work in this area includes:

- **Emerging and disruptive technologies**. Through engagement with technologists in academia and industry internationally, we will continue to build on our understanding of the impact of technological innovation in our sectors in areas such as AI, quantum communications, new computing architectures and new materials.
- **Exchanging experiences around online regulation**. We will continue to explore potential partnerships internationally, and to exchange experiences and best practices with other regulators (including those from Australia and Ireland) who are considering the challenges of online regulation, particularly related to harmful content.

3.36 Throughout the EU-exit process, we have provided the Government with independent technical advice in relation to the sectors we regulate. We will continue to provide similar advice to the Government to support its discussions on the UK's future relationship with the EU, and its work on other trade relationships.

4. Delivering good outcomes for consumers across the UK

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

Consumer outcomes measures

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

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

Strategic priorities	Measures we want to see
Investment in strong, secure networks	• Significant 5G roll-out and mobile investment needed to deliver the experience consumers expect in the mid to long-term • High levels of customer satisfaction with service • Increased number of homes with more than one gigabit capable network available • Significant investment in gigabit capable and full-fibre networks We will: • Identify gaps in network resilience standards and best practice and propose fixes • Monitor compliance with Telecoms Security framework
Getting everyone connected	• A reduction in the number of homes unable to get 10Mbit/s • Increases in the proportion of the UK that receives good quality mobile coverage from all mobile network operators We will monitor: • Royal Mail's financial sustainability • User satisfaction with postal services
Fairness for customers	• High levels of customer satisfaction with value for money • High levels of satisfaction with how complaints are handled We will monitor:

	• The proportion of out-of-contract customers and how much they pay • The proportion of people who have difficulties being able to afford communications services
Supporting and developing UK broadcasting	• Continued investment in content by PSBs including national and regional investment • High audience perceptions of the quality of TV • High levels of PSB reach and viewing • High levels of audience protection due to content standards • Improved representation and inclusion of diverse groups within the TV and radio industry
Preparing to regulate online harms	We will monitor: • Measures implemented by UK-established VSPs to protect users • Levels of consumer awareness of online tools and their use to protect consumers from harm online

Goals across the UK

4.4 Ofcom regulates for the whole of the UK. Our statutory national advisory committees advise us about the interests and opinions, in relation to communications matters, of people living in each of the four nations of the UK. These committees provide advice to our policy teams and are an important stage in our policy formulation process. The views of audiences across the UK are also presented on Ofcom's Content Board, which has experienced members representing each of the UK nations. There is also a statutory requirement for each of the UK nations to have its own representation on the Communications Consumer Panel, which pays particular attention to the needs of older and disabled people, people in rural areas and those on low incomes.

4.5 Ofcom has now also entered into formal memoranda of understanding (MoU) with the Department for Digital, Culture, Media and Sport (DCMS) and the governments and legislatures in Scotland and Wales, and is seeking to do the same in Northern Ireland. These MoUs commit Ofcom to consulting on our draft plan of work and sets out the process for Welsh and Scottish ministers to each appoint members to the Ofcom Board, among other things.

4.6 Bob Downes and David Jones have been appointed and serve as the Ofcom Board members for Scotland and Wales respectively; Bob Downes is also acting as interim member for Northern Ireland. These board members have direct input into Ofcom's priorities and work, ensuring that we can deliver our goals across the UK.

Common challenges

4.7 Providing fixed broadband, mobile, and postal services that meet the needs of consumers and businesses in rural and remote areas presents particular challenges. These areas fall disproportionately within Northern Ireland, Scotland and Wales and some English regions.

National, regional and local broadcasting services should meet the needs, and reflect the diversity, of audiences across all UK regions and nations. We are currently in a period of change that will affect all UK nations, with the pandemic, developments around the future of online regulation and a continuing period of change around the UK's relationship with the EU and beyond.

4.8 In 2021/22, as outlined elsewhere in this document, we will publish a number of reports.

- Our Connected Nations report, and updates, on broadband and mobile coverage and speeds, including variations between rural and urban consumers and in different areas of the UK. We will make this information available to consumers to help them make informed choices.
- A statement on our proposals as part of Small Screen: Big Debate, our fourth review of public service broadcasting, taking into account the different languages and national PSB landscapes – notably the PSBs which address specific UK nations.
- Ofcom's annual reports on media (Media Nations) and on the BBC, including assessing the BBC's performance against its operating licence. Each of these reports addresses issues about delivery to each of the UK's nations.
- We will promote diversity and equality of opportunity in broadcasting by publishing a report on the TV and radio industries and monitor broadcasters' progress on equality of opportunity, diversity and inclusion in employment.

4.9 We will also examine how we can help the UK Government and devolved Governments to achieve their relevant net-zero emission targets. We have in place ongoing work to reduce our own carbon footprint since 2007, and we will continue to explore how we can reduce our footprint further, while challenging industry to play its part too.

Scotland

4.10 In line with our MoU obligations, we will continue to work closely with the Scottish Government, Committees and Members of the Scottish Parliament as well as the Office of the Secretary of State for Scotland in delivering on our 2021/22 work programme.

4.11 We will continue to provide technical and regulatory advice, as well as relevant coverage data (where appropriate), to assist the Scottish Government in delivering its key telecommunications infrastructure projects - such as the 'Reaching 100%' superfast programme and the Scottish 4G mobile infill programme. This includes acting as an 'observer' on important forums in Scotland, including the Shared Rural Network (Scotland) Working Group and the Consumer Network for Scotland. We will also engage with the Scottish Government on aspects of its broader work programme, including its Draft Infrastructure Investment Plan and commitment to net-zero carbon emissions by 2045.

4.12 We will also support our wider stakeholder network in Scotland, maintaining productive working relationships with industry, government, local authorities and parliamentary stakeholders in Scotland. Specifically, we will engage with Scotland's tech sector to support VSP regulation and any potential responsibilities around online harms.

Wales

4.13 In line with the MoU, we will continue to work closely with the Welsh Government, Committees and Members of Senedd Cymru as well as the Office of the Secretary of State for Wales, in delivering on our 2021/22 work programme.

4.14 Effective engagement with stakeholders is at the heart of our ability to maintain our reputation in Wales. We will continue to work closely with the Welsh Government in providing technical and regulatory advice as well as sharing information as appropriate, including raising awareness of the programmes available to improve connectivity in Wales and progressing our work in supporting our new responsibilities around online harms regulation.

4.15 We will work with the Welsh Language Commissioner to promote the Welsh language in a purposeful manner, focusing our efforts on those areas that will provide consumers with most opportunity to use the language and have most impact.

Northern Ireland

4.16 We will seek to agree an MoU with the Northern Ireland Executive, the Northern Ireland Assembly and DCMS, mirroring the existing agreements in Scotland and Wales. This will include the appointment of an Ofcom Board member for Northern Ireland.

4.17 We will offer regulatory and technical advice to Northern Ireland Government departments and local councils to support full fibre broadband rollout through publicly funded programmes, and work with industry to encourage further commercial full fibre rollout.

4.18 We will engage with mobile companies and local authorities to make sure Northern Ireland benefits fully from the delivery of 5G services and will provide technical advice to the NI Shared Rural Network working group and the NI Executive's Mobile Action Plan to help ensure increased mobile coverage across Northern Ireland.

4.19 Following the UK's exit from the European Union we will continue to work closely with our counterparts in the Republic of Ireland - ComReg and the Broadcasting Authority of Ireland - and offer advice to the UK Government and consumer bodies to protect Northern Ireland consumers and preserve cross-border communication services.

England

4.20 We aim to make sure that our policy-making considers all communities within England. Some issues will continue to be important, from mobile coverage and the broadband Universal Service Obligation to the diversity of broadcasters on screen and off screen. We will continue to work with the Government, local MPs and local authorities.

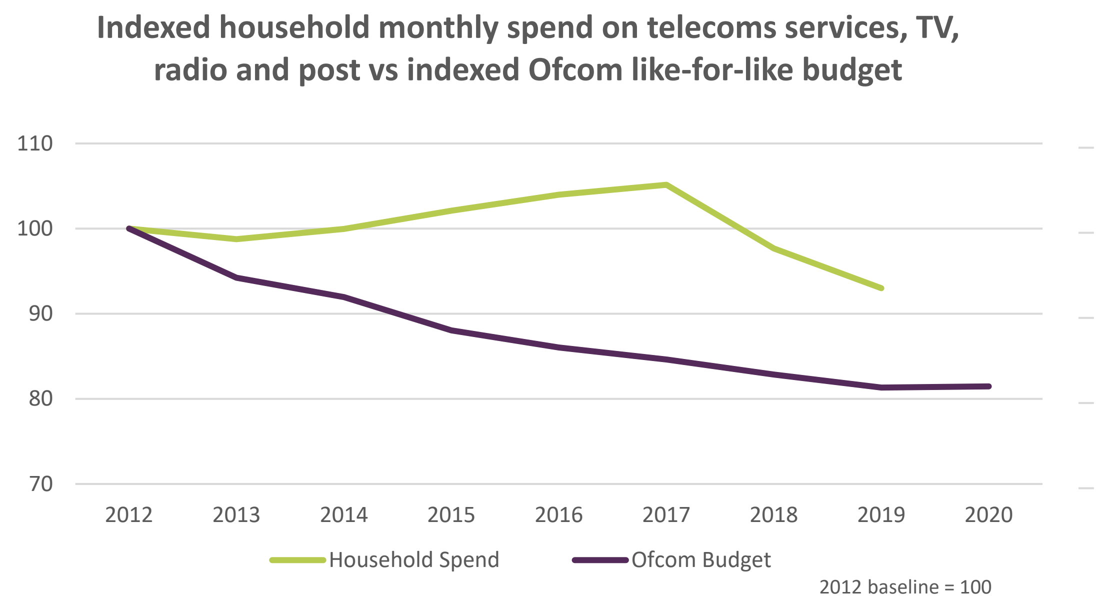
5. Ensuring value for money

We will continue to deliver efficiencies and savings

5.1 Since the UK Government's 2015 Spending Review we have achieved real-terms savings consistent with the wider public sector. The UK Government sets a spending cap for Ofcom's budget. We aim to be an efficient and effective regulator for a fast-paced communications sector.

5.2 Over this period, on a like-for-like basis, our budget has remained flat in nominal terms and has reduced by 8% in real terms, only adjusted for additional duties relating to the universal broadband service, cybersecurity, the BBC and VSP responsibilities. Ofcom continues to deliver like-for-like real-terms budget reductions and will continue to increase efficiency wherever we can.

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



Spending cap for 2021/22

5.4 The UK Government sets a spending cap for Ofcom's budget. We are currently in discussions to agree our spending cap for 2021/22 in light of our current duties. We will confirm the outcome of this in our final plan of work in March 2021 along with details of the funding for our work relating to online harms should that be confirmed.

5.5 Our costs are allocated to stakeholder sectors and the split will be published in our tariff tables alongside the final plan of work. The work plan is reflected in the tariffs we set, and there is no change to the method we have used to calculate these charges.

How we will manage our resources in 2021/22

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

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

5.8 Improving our offices and equipping our workforce with mobile ICT has allowed a more flexible and agile working environment for our workforce and has reduced our London footprint by 39% saving over £3m per annum. This allowed us to move rapidly to remote and hybrid working as a result of the pandemic.

5.9 We continue to review where our staff are located to ensure we are truly representative as a UK regulator. In the last few years, we have moved over 100 roles outside of London and the south-east of England, and we expect this trend to continue.

A1. What we do

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

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

Our principal duty is to further citizen and consumer interests

A1.3 Ofcom was established under the Office of Communications Act 2002 and operates under a number of Acts of Parliament.19 The Communications Act 2003 states that our principal duty 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 are to ensure that:

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

A1.5 Ofcom can enforce consumer law on behalf of consumers but does not have the power to resolve individual consumer complaints about telecoms or postal services, unlike in TV and radio. Where appropriate, we provide advice to complainants and refer them to the alternative dispute resolution (ADR) schemes that we have approved.

Ofcom's competition law powers

A1.6 In addition to our regulatory responsibilities set out above, we have powers in relation to communications matters to:

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

A1.7 We consider whether it is more appropriate to exercise Competition Act or sectoral powers in any given case, subject to the specific legislative requirements.

A2. Project work for 2021/2022

Project Details	Milestones
Consumer information on gigabit-capable / ultrafast broadband. People and businesses need the right information to make informed decisions about the broadband services that are best for them. We will continue to work with industry, the Government and consumer bodies on communicating the benefits of gigabit-capable technologies as they become more widely available.	Ongoing
Copper retirement. We continue to support Openreach's copper retirement trial in Salisbury and ongoing work to monitor the progress of the regulatory transition between copper and fibre services. We also currently plan to publish a further consultation on the circumstances in which some premises may be excluded from the definition of a completed ultrafast exchange, which will trigger the removal of certain requirements on BT.	Consultation Q3 2021/22
Telecoms regulation in the Hull Area. We will publish our final statement on our findings and any remedies for fixed telecoms services in the Hull Area in Q2 2021/22. This will cover all wholesale voice/broadband and leased-line markets.	Statement Q2 2021/22
Mobile strategy. We will develop a strategy for the sector that will underpin our future regulation and support the delivery of high-quality connectivity and innovation. We are currently considering the development of this work and we will be able to say more in our final plan of work in March.	Consultation Q2 2021/22 Statement Q4 2021/22
Network security and resilience. We will continue to work with the Government to implement the outcomes of the telecoms supply chain review, issuing guidance, including s105 relating to resilience, for industry and ensuring communication providers adhere to their security obligations and follow relevant guidance. In addition, we will provide technical advice to Governments' vendor diversification strategy. We will also continue to make sure communications providers and operators of essential services are managing security risks and engage with communications providers to carry out a threat intelligence-led penetration testing scheme (TBEST). We will also work with industry to identify and close gaps in standards and best practice, in relation to network resilience and continue the programme of pro-active monitoring of resilient design in current network deployments.	Ongoing
Award spectrum bands as they are cleared and released. We intend to issue a consultation during 2021/22 about the award of frequencies in 26 GHz.	Consultation H1 2021/22
Localised licensing. We will look to implement a fully automated authorisation approach for access to the shared bands and to provide a platform for more efficient access to more spectrum in specific locations in the future. We will update our framework for the TV White Space database.	Ongoing

Annual licence fees (ALF) for 2.1 GHz. Licences covering this spectrum will reach the end of the initial period covered by the auction in 2000 and we will therefore be setting the future annual licence fees to apply from January 2022.	Consultation Q3 2021/22
Licensing platform evolution (LPE). This will provide for a better online process for our customers and will enable us to continue to deliver an efficient spectrum licensing service into the future. Having carried out the initial design and preparation activity we expect to begin migrating across to this new system starting with our simpler, but highest volume licences during this period.	Ongoing
Electromagnetic fields (EMF) and Health. Following the conclusion of a second consultation, we will implement a requirement to comply with the basic restrictions for general public protection based on the International Commission on Non-Ionising Radiation Protection (ICNIRP) Guidelines to spectrum authorisations above 10 Watts EIRP (such as vary licences and update exemption regulations as necessary). We will continue our programme of measurements close to mobile phone base stations, with an ongoing focus on 5G, and enhance these measurements as necessary, implementing a compliance checking regime across appropriate bands and services.	Ongoing
Enabling growing demand for the use of drones. We will explore spectrum and authorisation options to support growing demand for beyond-line-of-sight drone use which can be used for a range of applications such as delivering medical supplies and monitoring traffic systems. We will work with the Civil Aviation Authority (CAA) to make sure we have a joined up regulatory framework.	Ongoing
Engaging with industry on wireless and spectrum. We will further our work to raise awareness of wireless and spectrum in the delivery of digital transformation across different industry sectors. We will continue our engagement to manage the needs of innovative services requiring wireless communication to meet their requirements.	Ongoing
Spectrum management strategy. We will publish a statement on the conclusions of our spectrum management strategy review, which we consulted on in December 2020, and which will set out how we intend to manage spectrum over the next ten years.	Statement Q2 2021/22
Spectrum roadmap. We will develop a strategic spectrum roadmap that reflects market, technology and international developments, to enable innovation and ensure access to spectrum when and where it is needed, including for mobile and 5G. This work will also inform our international position in preparation for the World Radiocommunications Conference (WRC) 2023.	Consultation Q3 2021/22
Improving consumer information on fixed and mobile coverage and performance. We are undertaking a programme of work to establish how we should report on the availability and quality of mobile coverage to present a consistent picture across 4G and 5G. As part of this we will also continue working with industry with the aim of improving the accuracy and commonality of indoor coverage information Ofcom and the industry provides.	Report Q3 2021/22

Mobile coverage. We will continue to report on progress made to improve coverage under the Shared Rural Network programme, as well as evaluating the single coverage model that mobile network operators (MNOs) are due to develop as part of this programme, and undertaking work to check the accuracy of operators' coverage predictions.	Ongoing
Broadband universal service. The Broadband Universal Service Obligation has launched and we will continue to monitor its delivery. We will also need to consider any funding claims for the connections that have been built. We are also continuing our work more generally to improve access to broadband services in the hardest to reach and most remote locations and to understand how people's future needs for connectivity will evolve in the future.	Consultation Q3 2021/22
Migration to voice-over-IP services. We will work with communication providers to help make sure issues raised by their migration to voice-over-IP services, including the potential future switch-off of the public switched telephone network (PSTN), are identified and addressed with the aim of protecting consumers from harm and minimising disruption.	Ongoing
Review of USO legacy services. We will continue our review of legacy universal service obligations, including public call boxes, itemised billing and printed directories.	Statement Q4 2021/22
Protecting customers if a provider fails financially. In the event of financial failure of a provider, customers should be protected and not lose access to their services. We will consider whether a scheme for telecoms could help to ensure customers are protected in these circumstances, in particular where the provider involved has its own network.	Ongoing
Home broadband performance measurement. We will publish data on the performance delivered by different services and how they vary by a number of factors including technology, service provider, package, geography and time of day.	Report Q3 2021/22
2G/3G switch off. We will continue our work exploring the impacts of 2G/3G switch off on all affected parties. We will work with mobile operators to help make sure issues are identified and addressed with the aim of protecting customers from harm and minimising disruption.	Ongoing
Improving indoor mobile coverage. We will improve the regulations controlling mobile phone repeaters to allow greater use while also protecting the mobile networks from interference from illegal equipment.	Statement Q2 2021/22
Monitoring the postal market and Royal Mail's performance. We will continue to monitor the postal sector as part of our statutory duty of securing a universal postal service, having regard to financial sustainability and efficiency. We will publish an update in late 2021.	Report Q3 2021/22

Review of the future regulatory framework for post. During 2020 we started work to assess what the appropriate regulatory framework should be for regulating the postal sector, in light of changes to the market - notably customers' increasing reliance on parcel delivery and the continued decline in letter volumes. Our plan is to have a new regime in place by 2022.	Consultation Q3 2021/22 Statement Q4 2021/22
Implementing new consumer protection measures. In October 2020, we concluded on a package of measures to further protect customers and help make sure they get a fair deal. These measures implement the new customer protections in the European Electronic Communications Code (EECC). We will work with providers during the implementation period.	Ongoing
Future of numbering policy review. We will continue our strategic review of the telephone numbering plan to make sure it provides what consumers understand, want and need from numbers for the coming decade. In particular, we will be considering the future of area codes, 084/087 numbers and we will continue our programme to address anomalies in the use of and charges for calls to 07 numbers. We will carry out this work alongside our review of the charges for non-geographic numbers.	Statement Q4 2021/22
Number authentication. We will undertake a programme of work to achieve greater trust in caller IDs and support tackling of nuisance and scam calls.	Report Q2 2021/22
Affordability of communications services. We will continue to monitor where households have difficulty paying for communications services, particularly in relation to broadband. We will consider whether any measures are needed to support consumers who are financially vulnerable, and work with the Government to consider the case for these where appropriate.	Report Q1 2021/22
Helping customers get better deals. Since February 2020, broadband, mobile, landline and pay-TV companies have been required to tell customers when their contracts are coming to an end and show them the best deals they have available. Out-of-contract customers will also have to be sent reminders and shown the best deals every year. We will be reviewing how providers have implemented these notifications and their impact on customer behaviour and we expect this to continue into the next performance year. We will also review the impact of the voluntary commitments made by a number of mobile and broadband providers as part of our package of measures to ensure fairness for customers.	Report Q1 2021/22
Participation and vulnerability. We will work to support the needs and interests of those who are disabled, elderly, on low incomes or living in rural areas, as well as those whose circumstances appear to put them in need of special protection. This will include contributing to joint policy work with the UK Regulators Network to improve outcomes for vulnerable consumers.	Ongoing
Open Communications. We will consider how to proceed with our proposals for Open Communications, which would enable people to share their data with third parties to help them navigate the market and get a better deal. We will work with the Government as it develops legislation to enable smart data initiatives across sectors.	Publication Q1 2021/22

Simpler switching. We will conclude on our proposals to introduce a new simpler switching process for all customers whoever their broadband provider. This is regardless of whether they are moving across different fixed networks (for example, between Virgin Media and a provider using the Openreach network) or between providers that use the same fixed network but connect customers using different technologies.	Statement Q1 2021/22
Tackling nuisance calls and scams. To help reduce nuisance calls and scams, we work with UK communications providers to disrupt and prevent these calls from being connected to customers. We work alongside other enforcement agencies, such as the Information Commissioner's Office (ICO), consumer interest bodies and international regulators, to share intelligence and best practice. We will also work in collaboration with Stop Scams UK to coordinate an industry led response to scams.	Ongoing
Reporting on pricing trends. We will report on pricing trends in fixed, mobile and pay-TV services. This will include a review of the prices available to consumers buying different types of services and a summary of what, on average, consumers are paying. It will also look at tariff structures and how 'discounted' prices vary from standard or 'list' prices, as well as the difference between in-contract and out-of-contract prices.	Report Q2 2021/22
Comparing service quality. We will publish our annual report looking at the quality of service provided to residential customers by fixed and mobile telecoms providers.	Report Q1 2021/22
Advertising policy and regulation. The Government has consulted on additional restrictions on TV advertising for food and drinks high in fat, salt and sugar (HFSS), including a pre-watershed ban, with a statement expected in due course. If tighter restrictions are introduced, Ofcom and its co-regulators (BCAP and the ASA) would be required to administer this.	Ongoing
Public service broadcasting programme: Small Screen: Big Debate. We will consider the role of public service broadcasting in a fast-changing media landscape, and the impact of the pandemic, by facilitating the 'Small Screen: Big Debate' programme of work with industry, the UK and devolved governments, Parliament, viewers and listeners.	Statement Q2 2021/22
Monitoring diversity and equality of opportunity in broadcasting. We will continue to report on diversity in the UK TV and radio sectors to provide a picture of how well individual broadcasters – and the industry as a whole – are promoting equality of opportunity, diversity and inclusion within their organisations.	Report Q3 2021/22
BBC Studios review. We are reviewing the evolution of BBC Studios, including how it has implemented our trading and separation requirements. We will publish the findings of our review in Q1 21/22.	Report on Findings Q1 2021/22

Monitoring the BBC's commercial activities. The BBC's commercial activities are required to earn a commercial rate of return over an appropriate period to ensure that public money is not used to finance loss-making commercial activities. We require the BBC to report on the financial performance and target rates of return for each of its commercial subsidiaries and each line of business within its commercial subsidiaries. We will also continue to monitor the BBC's compliance with our requirements in relation to operational separation and transfer pricing.	Ongoing
Ofcom's annual report on the BBC. We will set out how we have carried out our duties and assess the BBC's compliance with the specified requirements in its operating framework and operating licence. We will also publish a report measuring the BBC's performance in meeting its mission and public purposes across its public services.	Report Q3 2021/22
Material changes to the BBC public service activities. We will continue to monitor the BBC public service activities to ensure any material changes have appropriate regulatory scrutiny if required.	Ongoing
Responding to Channel 4 Corporation's annual Statement of Media Policy. We will publish our response to Channel 4 Corporation's delivery of its media content duties and plans for the following year as set out in its statement.	Report Q3 2021/22
On demand programme services (ODPS) accessibility code. We expect the Government to introduce regulations requiring providers of on-demand programme services to make them accessible to people with sight and/or hearing impairments. We will then consult on and publish a code giving guidance on meeting the requirements. The requirements are likely to involve providing subtitles, audio description and signing alongside programmes.	Consultation Q1 2021/22 Statement Q2 2021/22
Video-sharing platform regulation. The new Audiovisual Media Services Regulations 2020 introduce requirements for UK-established video-sharing platforms (VSPs) to take appropriate measures to protect children from harmful content and to protect the general public from content containing illegal material and incitement to violence or hatred. These regulations came into force on 1 November 2020. We are developing and publicly consulting on regulatory guidance for VSPs, which we expect to finalise by summer 2021.	Statement Q2 2021/22
Preparing to regulate online harms. We will complete the introduction of the new regime regulating UK-established video-sharing platforms, which will provide a foundation ahead of the introduction of broader online harms laws. The UK Government has stated that it is minded to appoint Ofcom as the regulator for online harms and we are preparing for this potential new role.	Report Q1 2021/22
Making Sense of Media. We will continue our work to help improve the online skills, knowledge and understanding of UK adults and children by providing research and collaborating with relevant organisations and industry. We will do this by further understanding people's experiences online through our existing longitudinal research, as well as deploying innovative research tools and approaches.	Publication Q1 2021/22 Publication Q3 2021/22

Online markets. Following on from our close working with the CMA-led Digital Markets Taskforce, we will continue to engage with the Government as it considers the taskforce's advice on a pro-competition regime for digital markets and works to establish a digital markets unit within the CMA.	Ongoing
Transforming Ofcom's capability in data engineering, science and analytics. We will continue to contribute to data science initiatives and support colleagues around the organisation to maximise insight and efficiency from data related activities. In addition to using innovative tools and processes to support policy and operational delivery, we will review emerging technologies and methodologies to make sure we remain at the forefront of understanding in this complex area.	Ongoing
Developing Ofcom's understanding of the technologies used to deliver online services. We are building Ofcom's capabilities in online technologies to support the increased relevance of these to our role in regulating VSPs and potentially online harms and in the cloudification of telecoms and broadcast networks. We have created a new knowledge management framework to keep abreast of fast-paced developments in this area, commissioned several external research projects to build our knowledge of the key technology areas and built links with the emerging SafetyTech industry. We plan to publish a series of discussion papers exploring the potential implications of key technologies.	Ongoing
Developing Ofcom's understanding of emerging and disruptive technologies and the roles they play in delivering services to consumers and businesses. We are seeking to understand, by engaging with technologists in academia and industry internationally, the potential impact of technological innovation on the sectors we regulate, including evolutions of known technologies and radical new technologies. These include technologies such as artificial intelligence (AI), quantum communications, new computing architectures and new materials.	Ongoing
Continuing to innovate in data and regulation to help consumers and businesses. Through our emerging technology programme, and horizon scanning work, we will continue to develop a deep understanding of innovation in the sectors we regulate and consider the implications for our work. We will continue our programme to equip colleagues with the skills, training and tools to extract insights from increasingly complex data sets, in order to deliver improved policy and operational outcomes. We will identify projects to trial creative and innovative approaches and techniques, especially focussed on the challenges of delivering work quickly where needed and facilitating creative thinking while working remotely or in hybrid office and remote working.	Ongoing
Annual diversity report. In Q2 2021, we will publish our annual diversity report, which looks at diversity and equality at Ofcom. It looks at the diversity profile of colleagues at Ofcom overall and in areas such as recruitment, performance and promotions. The report helps us to determine our strategic diversity and inclusion priorities and objectives for the coming year.	Report Q2 2021/22
Equal pay and gender-ethnicity pay. We want to promote a culture where all colleagues, whatever their gender or background, are valued on their merits and talents, and treated equally. Publishing our pay data is an important part of understanding where we need to improve. The report will explain our gender and ethnicity pay data for the period 2020/21.	Report Q4 2021/22

Carbon footprint reduction. With the aim of gaining an ISO14001 certification by Q4 21/22, and as part of our Reduce, Reuse, Recycle initiative, we will look at the following: environmental management to be more prominent within the organisation's strategic direction; the implementation of proactive initiatives to protect the environment from harm, such as sustainable resource use and climate change mitigation; the addition of a stakeholder-focused communication strategy; and easier integration into other management systems.	Report Q4 2021/22
Spectrum business sector reviews. We are reviewing the role of spectrum in supporting energy distribution networks to meet Government targets on carbon neutrality and manage new distribution models. We will also update our satellite and space strategy to refresh our programme of work and identify new activities to support the growing role of this sector.	Ongoing
Digital Regulation Cooperation Forum (DRCF). Building on the establishment of the DRCF in July 2020, we will be working with the CMA and the ICO to ensure a coherent regulatory approach to online services and issues. This will include developing our understanding of cross-cutting issues such as algorithmic personalisation; developing our capabilities; and working through specific policy interactions such as how the VSP regime and the children's code operate together to deliver the best outcomes for internet users.	Ongoing
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 devolved nations.	Publication Q1 2021/22 Publication Q2 2021/22 Publication Q3 2021/22
Media Nations. We will publish our annual report on key trends in the television and video, and the radio and audio sectors, which also features a version for each of the devolved nations.	Report Q2 2021/22
Online Nation. We will publish our annual report on what people are doing online, how they are served by online content providers and platforms, and their attitudes to and experiences of using the internet.	Report Q1 2021/22
Consumers' behaviour and experience of using mobile services. We will use crowd-sourced data to examine how people are using mobile phone services and the quality of performance provided to them by mobile network operators.	Report Q2 2021/22
Reporting on adults' media literacy. We will publish our annual Adults' Media Use and Attitudes report, looking at media literacy among UK adults. It will include data on the media use, attitudes and understanding of those aged 16 and over, and how these are changing over time. Alongside this, as a complement to our quantitative surveys, we will publish our annual Adults'	Report Q1 2021/22

Media Lives report, detailing the findings from our small-scale, longitudinal, ethnographic qualitative research among UK adults.	
Reporting on children's media literacy. We will publish our annual Children's Media Use and Attitudes report, providing evidence on media use, attitudes and understanding among children and young people aged 5-15, as well as information about the media access and use of children aged 3-4. The report will also include parents' views about their children's media use, and the ways parents monitor or limit children's use of different types of media. Alongside this, as a complement to our quantitative surveys, we will publish our annual Children's Media Lives report, detailing the findings from our small-scale, longitudinal, ethnographic qualitative research among children and young people.	Report Q4 2021/22

A3. Responding to this consultation

How to respond

A3.1 Ofcom would like to receive views and comments on the issues raised in this document, by 5pm on 5 February 2021.

A3.2 You can download a response form from https://www.ofcom.org.uk/consultations-and-statements/category-2/plan-of-work-2021-22. You can return this by email or post to the address provided in the response form.

A3.3 If your response is a large file, or has supporting charts, tables or other data, please email it to planofwork@ofcom.org.uk, as an attachment in Microsoft Word format, together with the cover sheet.

A3.4 Responses may alternatively be posted to the address below, given the ongoing pandemic please respond in an electronic format where possible. Please ensure that postal responses are marked with the title of the consultation:

Plan of work team
Ofcom
Riverside House
2A Southwark Bridge Road
London SE1 9HA

A3.5 We welcome responses in formats other than print, for example an audio recording or a British Sign Language video. To respond in BSL:

- Send us a recording of you signing your response. This should be no longer than 5 minutes. Suitable file formats are DVDs, wmv or QuickTime files. Or
- Upload a video of you signing your response directly to YouTube (or another hosting site) and send us the link.

A3.6 We will publish a transcript of any audio or video responses we receive (unless your response is confidential)

A3.7 We do not need a paper copy of your response as well as an electronic version. We will acknowledge receipt if your response is submitted via the online web form, but not otherwise.

A3.8 It would be helpful if your response could include a reference to the section and paragraph your response refers to. It would also help if you could explain why you hold your views, and what you think the effect of Ofcom's proposals would be.

A3.9 If you want to discuss the issues and questions raised in this consultation, please send an email to planofwork@ofcom.org.uk.

Confidentiality

A3.10 Consultations are more effective if we publish the responses before the consultation period closes. In particular, this can help people and organisations with limited resources or familiarity with the issues to respond in a more informed way. So, in the interests of transparency and good regulatory practice, and because we believe it is important that everyone who is interested in an issue can see other respondents' views, we usually publish all responses on the Ofcom website as soon as we receive them.

A3.11 If you think your response should be kept confidential, please specify which part(s) this applies to, and explain why. Please send any confidential sections as a separate annex. If you want your name, address, other contact details or job title to remain confidential, please provide them only in the cover sheet, so that we don't have to edit your response.

A3.12 If someone asks us to keep part or all of a response confidential, we will treat this request seriously and try to respect it. But sometimes we will need to publish all responses, including those that are marked as confidential, in order to meet legal obligations.

A3.13 Please also note that copyright and all other intellectual property in responses will be assumed to be licensed to Ofcom to use. Ofcom's intellectual property rights are explained further in our Terms of Use.

Next steps

A3.14 Following this consultation period, Ofcom plans to publish a statement in March 2021.

A3.15 If you wish, you can register to receive mail updates alerting you to new Ofcom publications.

Ofcom's consultation processes

A3.16 Ofcom aims to make responding to a consultation as easy as possible. For more information, please see our consultation principles in Annex 4.

A3.17 If you have any comments or suggestions on how we manage our consultations, please email us at consult@ofcom.org.uk. We particularly welcome ideas on how Ofcom could more effectively seek the views of groups or individuals, such as small businesses and residential consumers, who are less likely to give their opinions through a formal consultation.

A3.18 If you would like to discuss these issues, or Ofcom's consultation processes more generally, please contact the corporation secretary:

Corporation Secretary
Ofcom
Riverside House
2a Southwark Bridge Road
London SE1 9HA
Email: corporationsecretary@ofcom.org.uk

A4. Ofcom's consultation principles

Ofcom has seven principles that it follows for every public written consultation:

Before the consultation

A4.1 Wherever possible, we will hold informal talks with people and organisations before announcing a big consultation, to find out whether we are thinking along the right lines. If we do not have enough time to do this, we will hold an open meeting to explain our proposals, shortly after announcing the consultation.

During the consultation

A4.2 We will be clear about whom we are consulting, why, on what questions and for how long.

A4.3 We will make the consultation document as short and simple as possible, with a summary of no more than two pages. We will try to make it as easy as possible for people to give us a written response. If the consultation is complicated, we may provide a short Plain English / Cymraeg Clir guide, to help smaller organisations or individuals who would not otherwise be able to spare the time to share their views.

A4.4 We will consult for up to ten weeks, depending on the potential impact of our proposals.

A4.5 A person within Ofcom will be in charge of making sure we follow our own guidelines and aim to reach the largest possible number of people and organisations who may be interested in the outcome of our decisions. Ofcom's Consultation Champion is the main person to contact if you have views on the way we run our consultations.

A4.6 If we are not able to follow any of these seven principles, we will explain why.

After the consultation

A4.7 We think it is important that everyone who is interested in an issue can see other people's views, so we usually publish all the responses on our website as soon as we receive them. After the consultation we will make our decisions and publish a statement explaining what we are going to do, and why, showing how respondents' views helped to shape these decisions.

A5. Consultation coversheet

BASIC DETAILS

Consultation title:

To (Ofcom contact):

Name of respondent:

Representing (self or organisation/s):

Address (if not received by email):

CONFIDENTIALITY

Please tick below what part of your response you consider is confidential, giving your reasons why

Nothing ☐

Name/contact details/job title ☐

Whole response ☐

Organisation ☐

Part of the response ☐

If there is no separate annex, which parts? ____

____

If you want part of your response, your name or your organisation not to be published, can Ofcom still publish a reference to the contents of your response (including, for any confidential parts, a general summary that does not disclose the specific information or enable you to be identified)?

DECLARATION

I confirm that the correspondence supplied with this cover sheet is a formal consultation response that Ofcom can publish. However, in supplying this response, I understand that Ofcom may need to publish all responses, including those which are marked as confidential, in order to meet legal obligations. If I have sent my response by email, Ofcom can disregard any standard e-mail text about not disclosing email contents and attachments.

Ofcom seeks to publish responses on receipt. If your response is non-confidential (in whole or in part), and you would prefer us to publish your response only once the consultation has ended, please tick here.

Name Signed (if hard copy)