
Ofcom's Plan of Work 2020/21

Making communications work for everyone

[Ofcom's Plan of Work 2020/21](#) – Welsh translation available

STATEMENT:

Publication date: 30 April 2020

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1. Overview

This document sets out Ofcom's plan of work for 2020/21. This will be an exceptional year, with significant focus from Ofcom, and the organisations we work with, on responding to the coronavirus (Covid-19). People, businesses and the markets we regulate are facing uniquely challenging circumstances.

Since our consultation, we have revisited our plan in light of the coronavirus, which continues to unfold at the time of publication.

Overall, our goals have not changed. Communications networks and services have never been so important for everyone. Our work on fairness for customers, protection for vulnerable people, and access to content that reflects and supports our society, including accurate and high-quality news, plays a crucial role.

Over the last few weeks, with many of us working and learning from home, we have worked with telecoms operators and content providers to ensure that broadband and mobile networks remain resilient and continue to operate effectively. We have worked with the UK Government on a package of measures to support vulnerable customers, and with the Scottish Government, the Welsh Government and the Northern Ireland Executive to support services in the more rural and remote parts of the UK. In broadcasting, we have continued to respond quickly to broadcast content that could create the most audience harm, especially in relation to the coronavirus.

We are confident that our strategic themes and plan of work remain important for the longer term.

Our work to support people and businesses affected by the pandemic, and for 2020/21 as a whole, reflects our broader strategic themes:

- Better broadband and mobile – wherever you are;
- Fairness for customers;
- Supporting UK broadcasting;
- Ensuring online communications work for people and businesses;
- Enabling strong, secure networks;
- Sustaining the universal postal service;
- Continuing to innovate in regulation and data to help people and businesses;
- Increasing diversity and inclusion; and
- Support through the EU exit transition period and continued international relationships.

Our aim is to conclude our full programme of planned work for 2020/21. Where the businesses and organisations we regulate are unable to engage with us, or where we cannot hold necessary events or consultations, we are rescheduling our timescales. In some cases the new timings are clear, in others they will depend on events over the next few months as the UK emerges from the initial coronavirus crisis. We will keep our plans live and flexible, and will publish an updated plan in September, plus quarterly updates on our outputs and milestones.

This plan of work is based on responses to our January consultation document, and our public events in Belfast, Cardiff, Edinburgh and London.

Since then, the UK Government has announced that it is minded to appoint Ofcom as the new regulator for online harms and has confirmed Ofcom as the regulator for UK-based video-sharing platforms. The UK Government also announced new legislation to implement recommendations from its Telecoms Supply Chain Review, including enhanced enforcement powers for Ofcom in relation to network security.

This document includes our planned work in response to these announcements.

2. Introduction: communications have never been more important

- 2.1 Keeping communication going across the UK has never been more important. The sectors Ofcom regulates are playing a vital role in supporting families, businesses and individuals as we all adapt the way we live, work and communicate in the wake of the coronavirus.
- 2.2 In recent weeks the industries we regulate have come together to support the public and the economy, and to keep the nation connected, which we strongly welcome. Telecoms providers are working to ensure resilience across landline, broadband and mobile services as the demands on networks increase, as well as prioritising access to critical services like 999 or 111. Some companies have also taken specific steps to support their customers, such as providing unlimited calls or increased data allowances. Broadcasters are adapting their schedules to maintain high-quality programmes to inform, educate and entertain the public, and to ensure accurate and high-quality news. Postal providers are working hard to ensure continued delivery, particularly to vulnerable customers.
- 2.3 Ofcom has worked with the UK and devolved governments to support these efforts and will continue to do so. We also recognise that they take place against a backdrop of significant operational and financial challenges for our industries, as a result of the coronavirus and the lockdown period.
- 2.4 Many people employed in our sectors have been designated as key workers – including telecoms engineers, spectrum enforcement engineers, broadcasters, journalists and postal workers. We extend our thanks and support to them as they work to keep the nation’s communications going.

Critical activities to support the UK

- 2.5 Our mission is to make communications work for everyone. We set out our immediate priority of keeping vital networks resilient, and our approach to regulation through this period, in our [statement](#)¹ on 24 March 2020.
- 2.6 Since then, we have continued to work with industry and governments on efforts to support families, businesses and individuals during this time.

Network security and resilience

- 2.7 Amid home working and school closures, the telecoms industry is working closely with us and the UK Government to ensure the networks remain resilient and continue to work well.

¹ <https://www.ofcom.org.uk/about-ofcom/policies-and-guidelines/coronavirus-information>

- 2.8 Telecoms providers are monitoring closely traffic on their networks and keeping us informed of the measures they are taking to manage congestion effectively. We welcome the measures taken by content providers and streaming services, and engagement from content delivery networks and gaming companies, to mitigate the impact of the increased load on the network by adapting their services where possible. As a result, demands on networks are spread across the day and peaks in traffic are reduced. We are also engaging with network operators looking for flexibility to proactively manage network traffic where necessary, for example, to address the network demands resulting from increased home working.
- 2.9 The reliability of 999 and 111 calls is a critical priority. Under Ofcom's existing rules, phone companies must ensure that emergency calls can be connected at all times, even in challenging circumstances. We keep in close contact with those responsible for connecting 999 and 111 calls, and have received detailed assurances on the capacity and resilience of both services.

Protecting and managing the airwaves

- 2.10 Ofcom has a vital role to keep the UK airwaves free from interference, so critical communications and broadcasting can take place. We will be prioritising any action that is required to protect critical services, such as for power networks. Our engineers and technicians have been designated as key workers, and are continuing to work to keep the airwaves safe and functioning.

Keeping people connected and protecting customers

- 2.11 Our priority during this period is for customers to stay connected, supported if they are struggling financially and protected from unexpectedly high bills. Ofcom is working with the UK Government and communications providers on measures to support vulnerable customers, which include: avoiding disconnections for those unable to pay by deferring bills; providing connectivity for customers who lose fixed services; providing free 101 calls; and tackling high charges for hospital phone services.
- 2.12 We are also continuing work with telecoms companies to provide practical information to help people and small businesses make the most of their mobile and broadband connections, through our "Stay Connected" campaign.

Ensuring that people can access high quality content, and maintaining trust in and reliability of TV and radio services

- 2.13 More than ever, audiences now rely on high quality, accurate and impartial news and content. Accuracy in broadcasting is essential, and we will expedite any standards enforcement cases involving potentially harmful broadcast content relating to the coronavirus. We have made clear that we will prioritise broadcasting standards cases related to the coronavirus that might cause harm to audiences and we are doing so. We

are also supporting wider efforts to combat disinformation through the weekly research we publish about how people receive and act on information during the pandemic.

Supporting the Nations

- 2.14 We are working closely with the Scottish Government, the Welsh Government and the Northern Ireland Executive on critical issues for each UK nation. This includes focusing on broadband, mobile and postal services in the more rural and remote parts of the UK, and working with broadcasters to help the creative sector respond to and manage the effects of the virus and the lockdown period.

Overseeing a flexible regulatory environment

- 2.15 We are ready to adapt our regulatory approach during this period so that our businesses can focus their time and effort on business-critical matters. For example, on 24 March we announced that we would suspend all existing consultation deadlines and information requests, and put on hold new consultations, decisions and information requests.
- 2.16 We are taking a pragmatic approach to enforcement during this time. Compliance with regulation continues to be important. However, we recognise that the impact of the coronavirus means that it will not always be possible to meet these obligations. Our view is that companies should take decisions that support critical services, vulnerable people and those who are relying on communications services. We will support those decisions where they are in the interests of people and businesses.
- 2.17 For example, on 20 March we wrote to all broadcasting licensees to explain that, while we would not formally relax licence conditions, we did consider that ‘force majeure’ was in effect, so we would not pursue enforcement action on programme or production commitments. For the BBC and other broadcasters, we are being flexible where they cannot deliver licence requirements due to staffing or shutdown arrangements. With telecoms operators, we are temporarily relaxing some requirements (e.g. on automatic compensation and quality of service regulation), and taking a pragmatic approach to the enforcement of our rules on end-of-contract notifications.
- 2.18 We recognise that the different companies we regulate have different obligations and we will continue to take a pragmatic approach. But as the current situation becomes more manageable, we expect our stakeholders to comply with their regulatory obligations as soon as operationally and reasonably possible.

Delivering our overall work programme

- 2.19 Our aim is to conclude our full programme of planned work for 2020/21, working from home where it continues to be appropriate. We have reviewed our plans for 2020/21, amending timelines to reflect the reality that many of the businesses and organisations we regulate will have to focus their time and attention on business-critical issues in the coming months.

- 2.20 Where those we regulate are unable to engage with us, or where we cannot hold necessary events or consultations, we are rescheduling our timescales. In some cases the new timings are clear, in others they will depend on events over the next few months as the UK emerges from the initial coronavirus crisis. From the beginning of June onwards, we will start to issue new publications and information requests in line with our plan of work, particularly focused on priority areas. Prior to that we will consider where we can close outstanding consultations or information requests, and continue to publish research reports, being particularly sensitive to any requests which require significant input from businesses and organisations.
- 2.21 We will keep our plans live and flexible, and will publish an updated plan in September, plus quarterly updates on our outputs and milestones. Details on timescales can be found in Annex 3.
- 2.22 The rest of this document sets out our plan of work for 2020/21, including delivery dates.

3. Our goals and priorities for 2020/21

- 3.1 The coronavirus pandemic has confirmed the vital role of the industries we regulate, and we need to support these sectors' preparations for the future as the country comes out of the crisis. The nine strategic themes on which we consulted remain right for people and businesses across the UK in the medium to long term.
- 3.2 In setting these themes and our work programme we have had regard to the UK Government's Statement of Strategic Priorities ("SSP")² as follows:
- **World-class digital infrastructure.** Securing investment in world-class digital infrastructure is a priority for the UK Government. Our work under the theme "Better broadband and mobile – wherever you are" supports this priority by promoting competition and investment in new networks and optimal use of spectrum, to benefit people and businesses across the UK.
 - **Furthering the interests of telecoms customers.** One of the UK Government's strategic priorities is to safeguard the interests of telecoms consumers, including the vulnerable and less engaged. Our work on securing "Fairness for Customers" supports this priority.
 - **Secure and resilient telecoms infrastructure.** Our programme on 'Enabling strong, secure networks' directly supports the UK Government's strategic priority to ensure telecoms networks and services are secure and resilient.
 - **Postal services.** Our ongoing work on "Sustaining the universal postal service" supports the Government's strategic priority on post, including the need for industry and Ofcom to work together to secure the long-term sustainability of the sector.

Our major work by strategic theme

Better broadband and mobile for everyone – investment and innovation matter more than ever

- 3.3 **We want to make sure that everyone can access fast and reliable broadband and mobile services, wherever they live, work, and travel.** Past investment in superfast broadband, 4G mobile, and core networks have so far met the challenge of increased business and household usage. During 2020/21 we will focus on work that supports continued investment and competition in gigabit-capable fixed and wireless services including fibre and 5G to meet continually growing demand.
- 3.4 **We are actively supporting investment in fibre networks.** We will conclude our Wholesale Telecoms Fixed Access market review by April 2021, setting up a longer-term regulatory framework for competition and investment for the five years from April 2021 to 2026. This

²

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/779226/SSP_Consultation_-_Publication_Version_2_.pdf

review will support investment and competition in gigabit-capable services, making world-class broadband services available to as many people and businesses as possible.

3.5 **We will help new wireless services launch, for people and industry, including 5G.** We want to ensure that the market has the spectrum it needs to enable consumers to benefit from an improved experience and to market players to deploy innovative services and deliver economic benefits for the UK. We believe spectrum should be used when it is available and will award licences in the 700 MHz and 3.6-3.8 GHz spectrum bands by auction as quickly as possible.

3.6 **We will clear digital television services from the 700 MHz band in order to release this spectrum for mobile data.** We will continue to administer a grant scheme to fund incremental costs that broadcasters incur as a result of the infrastructure changes associated with 700 MHz clearance. We will also monitor the rollout and development of 5G and fixed wireless access services. We will take a range of actions to make additional spectrum available – including increasing access to licence-exempt spectrum to support innovation, and enabling new technology trials through our Innovation and Trial licences.

3.7 In addition to these areas, we will:

- support the delivery of universal, decent broadband services, setting out funding rules in Q1 and further assessing the reach of services in Q3. We will work with the Government on its programme to bring fibre to the hardest to reach parts of the country;
- work with industry throughout the year to support a managed retirement of services that rely on older copper networks, and changes to fixed voice services, consulting in Q1 on rules for when older services can be retired;
- continue to help to improve mobile coverage. This includes ongoing technical advice to the UK Government on the Shared Rural Network announced on 9 March 2020. We will continue to explore options to enhance people’s coverage when they travel or are inside buildings;
- develop further opportunities for spectrum sharing to support new services through new ways of authorising spectrum, including automated processes; and
- continue to publish our results from testing the electromagnetic power of mobile base stations. We will also, subject to the results of our consultation, introduce new spectrum licence condition requiring relevant spectrum users to comply with international standards on electromagnetic fields (EMF).

Fairness for customers – helping consumers at all times

3.8 It is vital that people are treated fairly by their providers, and can trust that markets operate with integrity. In 2020/21 we will continue the significant progress made towards this goal last year, when all major broadband, phone and pay-TV companies signed up to our new Fairness for Customers Commitments in June 2019.

3.9 **Protecting customers’ rights and helping them switch.** We set out our plans for implementing the customer rights section of the European Electronic Communications

Code (EECC) in December 2019. These included proposed changes to regulatory rules on switching and number porting, contract durations when handsets are sold with a link to a mobile airtime contract (known as linked split contracts), handset locking, and correspondence on communications services in an accessible format for disabled customers. We are discussing the timing of bringing the customer rights aspects of the EECC into UK law with the Government. Subject to the Government publishing its statement on transposition of the EECC, we expect to publish our statement in Q2, with implementation occurring after this date. We also expect to consult on further changes to how customers are able to switch their landline and broadband services in Q2.

- 3.10 **Helping more customers get fairer broadband deals.** We are continuing our work to ensure more broadband customers are on fair deals. We will monitor customer outcomes following the implementation of voluntary pricing commitments from industry announced in September 2019. We will publish our findings in Q2.
- 3.11 **Affordability of broadband services.** Throughout the year, we will monitor where households have difficulty paying for communications services, in particular in relation to broadband. If we identify a potential need for a targeted tariff to protect those in low income homes, we will work with the Government to consider how such a tariff might be implemented. We will publish our findings in Q3.
- 3.12 We will also continue work on:
- guiding industry on treatment of vulnerable consumers with a statement in Q1, recognising actions taken by industry during the coronavirus crisis;
 - putting fairness at the heart of providers' businesses, updating on industry's progress in its fairness commitments and responses to the current pandemic in Q4; and
 - making data work for customers, consulting on open communications and publishing a discussion paper on personalised pricing, both in Q2.

Supporting UK broadcasting – maintaining a media environment that supports our society

- 3.13 Broadcasting that provides high-quality content to entertain, educate and inform the public, alongside accurate and high-quality news, is crucial. We will support the UK's vibrant broadcasting sector to deliver benefits to all of the UK. Public service broadcasters, in particular, are the cornerstone of the UK media as trusted sources of news and current affairs. Ofcom has a duty to monitor the public service broadcasters' performance, ensuring each delivers on its remit. We can also make recommendations to Government to maintain and strengthen the system.
- 3.14 **Contributing to the debate on a future public service broadcasting system.** We have already started a broad review to provide advice to the UK Government on public service broadcasting's role in today's fast-changing media landscape. We have been facilitating a 'Small Screen: Big Debate' with industry, the UK and devolved governments, Parliament and the devolved legislatures, viewers and listeners. This work will consider how to make sure the UK has a resilient public service broadcasting system that continues to adapt to

audience needs. We are looking at the wider trends that will shape public service broadcasting and the different ways it could be delivered.

- 3.15 Our work on public service broadcasting is now more important than ever: the coronavirus pandemic highlights the importance of high quality and reliable content that works for audiences right across the UK, but might also accelerate structural changes in that market. In February³ we set out the scope of our work, focused on three areas: what public service broadcasting should deliver, how it should be delivered, and how it should be funded. The coronavirus and lockdown period has had a significant impact on the broadcasting sector and has been a unique period to observe the role that public service broadcasters, and other media organisations, play in our lives. We are now considering how best to reframe the current debate to provide evidence and insight into the future of public service broadcasting. Public, industry and stakeholder engagement will remain at the heart of this work. Some forms of engagement are more challenging in the current context and will therefore delay some aspects of this work compared to our previous plans. However, we are taking it forward as a priority and aim to consult before the end of the calendar year.
- 3.16 Our work to support UK broadcasting will also include:
- reviewing BBC Studios, publishing findings into the BBC's implementation of our Trading and Separation requirements in Q4;
 - conducting our annual review of the BBC's performance in Q3;
 - continuing to address content standards cases as they arise throughout the year; and
 - continuing to challenge the broadcast industry to improve on diversity and inclusion. We will publish findings on diversity in TV and radio in Q3.

Making sure online communications work for consumers and businesses – people need to remain both connected and safe

- 3.17 Online communications are a vital part of many people's lives, helping them to stay connected with friends and family, enabling them to work and learn from home and engage with businesses more generally. Our work in this area will focus on preparing for the introduction of new regulation, and promoting understanding of how people engage online.
- 3.18 **Ensuring video sharing platforms (VSPs) take appropriate measures to protect users.** The new Audiovisual Media Services Directive (AVMSD) introduces new regulatory requirements for VSPs on commercial communications, protecting children from harmful content, and protecting the general public from illegal content and content that incites violence or hatred. The UK Government has appointed Ofcom as the VSP regulator (ahead of the online harmful content and conduct regime). We are developing and will consult on regulatory guidance for UK-established VSPs in Q3 2020/21, once the necessary legislation

³ Ofcom, February 2020, *Small Screen: Big Debate – a five-year review of Public Service Broadcasting (2014-18)*. https://www.ofcom.org.uk/_data/assets/pdf_file/0013/192100/psb-five-year-review.pdf

has passed. We will also work closely with international regulators to help protect UK consumers from harmful content online across all VSPs.

3.19 **Contributing to the development of new legislation on online harmful content and conduct, and preparing for possible new regulatory powers.** The UK Government has announced that it is minded to appoint Ofcom as the new regulator of harmful content and conduct online. If confirmed, these proposed new responsibilities would constitute a significant expansion to our remit, and preparing for them will be a major area of focus in 2020/21 and beyond. New responsibilities would need additional skills and expertise, new technical systems and revised organisational structures. The timing of this work will depend on the UK Government's process for making final decisions and introducing new legislation. In the meantime, we will continue providing technical advice and input to policy development by the Government. We will help to inform policy development by conducting further research on peoples' experiences and concerns of harmful content online, and how effective current approaches are in keeping internet users safe online. We will publish this research as part of our Making Sense of Media programme.

3.20 We will also conduct work through the year in:

- understanding people's experiences online, and supporting internet users to protect themselves from harms through our Making Sense of Media programme, and the publication of our Online Nation report in Q1; and
- understanding new online communication services (number-independent interpersonal communication services - NIICS), working with industry to ensure awareness of new approaches to regulation in this space.

Enabling strong, secure networks – ready to meet current and future challenges

3.21 People across the UK expect and rely on strong and secure networks today and in the future. Ofcom has a key role to play alongside other actors to make this happen.

3.22 **We will work with the UK Government to implement the outcomes of the telecoms supply chain review**, engaging with industry, including equipment suppliers. We continue to work closely with the Government, the National Cyber Security Centre and industry to monitor potential risks, providing guidance and advice to support the development of new legislation, which the Government has committed to introduce this year.

3.23 **We will aim to ensure communications providers within the scope of the Government's telecoms security requirements adhere to relevant guidance.** The Government's proposed legislation would enhance Ofcom's enforcement powers. We will continue to ensure that communications providers comply with their existing responsibilities in the meantime.

3.24 **To support our growing role, we will build a centre of excellence for expertise in security and resilience.** Throughout 2020/21 we will continue to invest in our cyber security capability and work with communications providers. This will enhance our skills and

capability to help ensure that networks are resilient and secure and are protected against outages or cyber-attacks.

3.25 We will also:

- work with industry throughout the year to identify and close gaps in standards and best practice. We will particularly look at converged networks, network stability and network outages; and
- continue engaging with communications providers and the National Cyber Security Centre to carry out a rolling threat intelligence-led penetration testing scheme (TBEST) programme. This assesses how well a company stands up to a concerted attack based on techniques used by cyber criminals and hostile nation states.

Sustaining the universal postal service – through a period of possibly accelerated change in letters and parcels volumes

3.26 Post is crucial for ecommerce, and is an important means of communication for people and businesses. However, the sector is facing substantial change, as parcel volumes grow and letter volumes decline. This long-term trend might be accelerated by the coronavirus pandemic, putting further pressure on the sector even as it continues to adapt and evolve.

3.27 **Understanding postal users' needs** will be a key focus for 2020/21. The growth in parcel volumes and decline in letters continue to affect the postal market. So, we are assessing whether the postal market is meeting the reasonable needs of users. We will publish this assessment in Q3 2020/21.

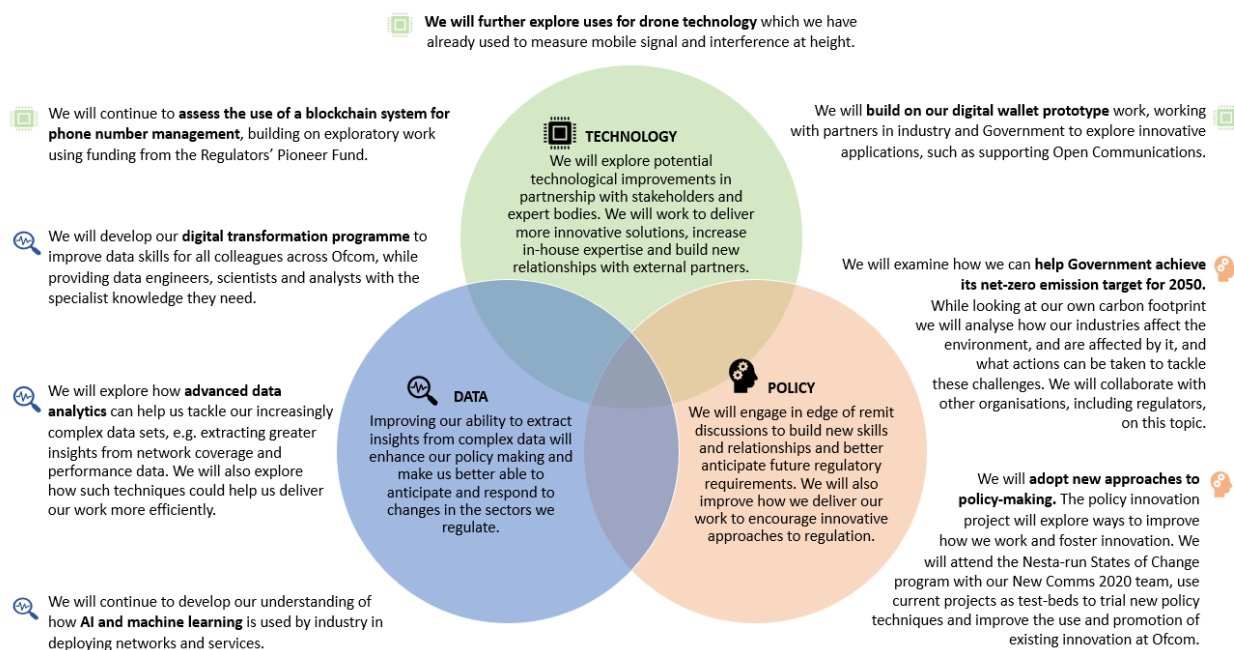
3.28 Throughout the year, we will also continue to proactively:

- monitor Royal Mail's financial and operational performance, reporting in Q3; and
- consider future options for postal regulation.

Continuing to innovate in regulation and data to help people and businesses – remaining relevant and efficient

3.29 The markets that Ofcom regulates are fast-changing and highly innovative, creating new opportunities and challenges for consumers. Ensuring our work is future-looking and innovative is critical to our success. We will need to innovate and adapt to changes we see in the world after the coronavirus crisis, and respond effectively to new challenges and areas of responsibility, such as regulating online harmful content and conduct.

3.30 The diagram below sets out how we are structuring our internal approach to innovation, alongside providing an indicative list of the innovation projects we are running. Innovation in general, and these projects, will support better consumer and business outcomes across the whole of this work programme.



3.31 In 2020/21 we will:

- examine the most appropriate roles regulators can play to help the Government achieve its net-zero emission target for 2050;
- collaborate with businesses, organisations and other regulators to develop skills and deliver innovative regulation;
- improve Ofcom’s data skills and capabilities; and
- adopt and embed new and data-driven approaches to policy-making across our work.

Increasing diversity and inclusion – helping the UK to reflect itself

3.32 We believe a strong focus on diversity and inclusion is essential to best represent the needs of people across the UK. We recognise that Ofcom has more to do, both as an employer and as a regulator, to make sure we have a workforce that represents the UK and looks at issues in an inclusive way.

3.33 We will publish:

- an updated strategy for our internal diversity and inclusion work in Q3, including diversity targets; and
- our Equal Pay and Gender and Ethnicity Pay report in Q4.

3.34 We also believe that broadcasting benefits people when it reflects our rich and diverse society, drawing on the best talent from across our communities. We will publish our:

- annual reports on diversity in TV and radio in Q3;
- our annual report on the BBC’s performance, as set out above; and
- a revised code for broadcasters on making on-demand TV services accessible for all audiences, for example through subtitles or audio description in Q4.

Providing support through the EU exit transition period, and building on our international relationships

- 3.35 We will continue to provide independent technical advice to the UK Government on EU exit matters, and other aspects of our future relationship with the EU and beyond relating to our sectors. This will sit alongside our support for consumer and industry stakeholders preparing for a range of possible outcomes after the transition period.
- 3.36 Our investment in bilateral relationships with relevant counterparts around the world and involvement in the key global and regional regulatory debates will be maintained. Ofcom will also continue to represent the UK on communications matters internationally, where relevant. For example, we will continue to invest in multilateral groups to achieve our spectrum objectives and to protect UK interests.

Our wider ongoing work will continue, supporting effective communications sectors and better consumer outcomes

- 3.37 Our broader programme of ongoing work plays an equally important role in achieving our duties and goals, underpinning the regulation of our sectors. This ongoing work programme is non-discretionary and set in legislation. It includes managing scarce resources like telephone numbers, monitoring the BBC, licensing spectrum users, conducting research, and publishing information on people's experiences of communications services. Alongside this, we carry out discretionary work to help make communications work for everyone.
- 3.38 Our wider programme of work and priority areas are supported by our commitment to fostering a culture of regulatory and standards compliance among UK communications providers and for wireless equipment available on the UK market. We monitor complaints, analyse evidence, engage with industry and take enforcement action where necessary, making sure our decisions are enforced and that people are protected from harmful practices. We also monitor communications providers' compliance with network security obligations to reduce the risk of breaches.
- 3.39 This means enforcing our rules to make sure people are protected and that communications providers are aware of their regulatory obligations.

4. Delivering for people across the UK

Consumer outcome measures

- 4.1 To be an effective regulator, it is important that we set out the sorts of outcomes we want to help achieve through our work.⁴ Doing so also helps us assess how well we have delivered on our objectives, and where more can be done.
- 4.2 We include below a list of measures that will help us assess how well our actions have benefitted people and businesses. These measures are designed to be ambitious and, in many cases, may take a number of years to deliver. This list is not exhaustive.
- 4.3 We will report on our performance in the 2021 Annual Report, and continue to publish a wide range of more detailed measures.⁵ We also expect to publish reviews for a selection of priority projects every year.

Strategic themes and work areas	Measures we want to see
Better broadband and mobile – wherever you are (broadband)	<ul style="list-style-type: none"> • A reduction in the number of homes unable to get 10 Mbit/s • Widespread gigabit-capable / full-fibre rollout • Significant investment in gigabit-capable and full-fibre networks • Increased number of homes with more than one gigabit-capable network available • High levels of customer satisfaction with service
Better broadband and mobile – wherever you are (mobile)	<ul style="list-style-type: none"> • Increases in the proportion of the UK’s geography that receives good quality mobile coverage from all mobile network operators (for example, as committed to through the delivery of the Shared Rural Network) • 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

⁴ We are mindful that much of what we would like to achieve is also reliant on a number of external factors.

⁵ These include, those published in:

- The Connected Nations and infrastructure reports: <https://www.ofcom.org.uk/research-and-data/multi-sector-research/infrastructure-research>
- Comparing Service Quality Reports: https://www.ofcom.org.uk/_data/assets/pdf_file/0022/145525/comparing-service-quality-2018.pdf
- Annual monitoring updates on the postal market: https://www.ofcom.org.uk/_data/assets/pdf_file/0022/145525/comparing-service-quality-2018.pdf
- Media Nations: https://www.ofcom.org.uk/_data/assets/pdf_file/0019/160714/media-nations-2019-uk-report.pdf
- Adults’ Media Use and Attitudes reports: https://www.ofcom.org.uk/_data/assets/pdf_file/0021/149124/adults-media-use-and-attitudes-report.pdf
- Ofcom diversity and inclusion programme 2018-2022: https://www.ofcom.org.uk/_data/assets/pdf_file/0009/112500/dip-statement.pdf

<p>Fairness for Customers</p>	<ul style="list-style-type: none"> • High levels of customer satisfaction with value for money • High levels of satisfaction with complaints handling <p>We will monitor:</p> <ul style="list-style-type: none"> • The proportion of out of contract customers • The proportion of people who have difficulties being able to afford communications services
<p>Supporting UK broadcasting</p>	<ul style="list-style-type: none"> • Continued content investment by the PSBs including in the nations and regions • High audience perceptions of the quality of TV • High levels of PSB reach and viewing • High levels of audience protection due to content standards
<p>Ensuring online communications work for people</p>	<p>We will monitor:</p> <ul style="list-style-type: none"> • Levels of consumer awareness of online tools and their use to protect consumers from harm online
<p>Enabling strong, secure networks</p>	<p>We will:</p> <ul style="list-style-type: none"> • Identify gaps in network resilience standards and best practice and propose how they can be addressed • Monitor compliance with the Government’s guidance on telecoms security requirements
<p>Sustaining the universal postal service</p>	<p>We will monitor:</p> <ul style="list-style-type: none"> • Royal Mail’s financial sustainability • User satisfaction with postal services
<p>Continuing to innovate our approach to regulation and data</p>	<p>Internally, we will:</p> <ul style="list-style-type: none"> • Maintain an understanding of the impact of existing, emerging and future technologies • Work across the organisation to improve our capability to capture, store, share, analyse and extract insight from data • Explore opportunities for innovation in policy development
<p>Increasing diversity and inclusion</p>	<p>Internally, our strategy published in 2015 set targets for us to achieve:</p> <ul style="list-style-type: none"> • 50:50 gender balance • 40% female representation at senior level • 13% of senior level colleagues from a minority ethnic background

Goals across the UK

- 4.4 Ofcom regulates for the whole UK. To support this, we are set up to represent and act on the interests of those across the UK, including through:
- our national advisory committees who advise Ofcom about the interests and opinions of people living in each of the four nations of the UK and are an important part of our policy development;

- the views of audiences across the UK which are also represented on Ofcom’s Content Board, with experienced members representing each of the UK nations; and
 - the Communications Consumer Panel which has representatives for each of the nations, with particular attention to the needs of older and disabled people, those in rural areas and people with low incomes.
- 4.5 Ofcom has entered into formal Memoranda of Understanding (MoU) with the governments and legislatures in Scotland and Wales with a similar MoU expected to be agreed with the administration in Northern Ireland now that devolution has been restored. We continue to seek the views and input of each nations’ governments and legislatures.
- 4.6 Bob Downes continues as the first Ofcom board member for Scotland, and David Jones was appointed as the first Ofcom board member for Wales in April 2019. Appointment of a member for Northern Ireland is expected to follow now that the devolved government has been restored. In the meantime, Bob Downes will continue to act as interim member for Northern Ireland. These board members have direct input into Ofcom priorities and work, ensuring that we can deliver our goals across the UK.

We will respond to particular challenges in the UK’s nations

- 4.7 Providing fixed broadband, mobile, and postal services that meet the needs of people and businesses in rural and remote areas presents particular challenges. These areas fall disproportionately within Northern Ireland, Scotland and Wales, although similar challenges also affect some English regions. Broadcasting services should meet the needs, and reflect the diversity, of audiences across all UK regions and nations.
- 4.8 **Responding to these challenges.** Our response to these challenges will see us continue to work closely with the devolved governments, legislatures (both committees and members) and businesses in each nation of the UK. This includes providing technical advice and data to the devolved governments’ respective fixed broadband and/or mobile schemes, and in our assessment of the BBC’s performance against the conditions specific to Scotland, Wales and Northern Ireland in its Operating Licence. We will work with each of the devolved administrations and broadcasters to help the creative sector respond and recover from the impact of the coronavirus.
- 4.9 **MG ALBA and Welsh language.** In Scotland and Wales we will continue to deliver our statutory duties in relation to MG ALBA and work with the Welsh Language Commissioner to promote the Welsh language in a purposeful manner, focusing our efforts on those areas that will provide people with most opportunity to use the language and have most impact.
- 4.10 **Ireland coordination.** As the UK leaves the European Union, we will continue to work closely with our counterparts in the Republic of Ireland, ComReg and the Broadcasting Authority of Ireland, to coordinate and to preserve cross-border communications services.
- 4.11 **Local communities.** We aim to ensure that our policy-making considers all communities within England. 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 public sector. The UK Government sets a spending cap for Ofcom's budget.
- 5.2 Over this period, on a like-for-like basis, our budget has remained flat in cash terms, a 7% reduction in real terms. It has only been adjusted for additional duties relating to the Broadband Universal Service Obligation, cybersecurity and the BBC.

Spending cap for 2020/21

- 5.3 For 2020/21, the UK Government has set a spending cap of £131.9m. This includes increases linked to inflation, plus additional funding for work on the broadband universal service obligation, and the new regulatory regime for video sharing platforms. Funding for setting up the video sharing platform regime and related online responsibilities will be from retained Wireless Telegraphy Act receipts and not funded by those we regulate.
- 5.4 As with previous years, our costs are allocated to stakeholder sectors and the split has been published in our 2020/21 tariff tables.

How we will manage our resources in 2020/21

- 5.5 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.
- 5.6 Our resources and skills are aimed at delivering our plans and duties through strategic planning and an integrated approach to our budgets and forecasts. We also continue to maximise savings by using competitive processes to achieve the best price and quality of service from our suppliers.
- 5.7 Improving our offices has allowed a more flexible and agile working environment for our workforce and has reduced our London footprint. This will ultimately lead to savings of at least £3m per year while providing a more collaborative workspace and improving our ability to respond flexibly during the year. We have also invested in ICT to support more agile working and the ability to work from different locations including home.

A1. What we do

- A1.1 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.
- A1.2 We act independently from governments and commercial interests to deliver our duties. However, we are accountable to Parliament, and to perform our role effectively we need to engage openly and constructively with the UK and devolved governments. We provide technical advice to governments (for example, our 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.⁶ 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 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.

⁶ These include the Communications Act 2003, the Wireless Telegraphy Act 2006, the Broadcasting Acts 1990 and 1996, the Digital Economy Acts 2010 and 2017 and the Postal Services Act 2011.

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 the corresponding provisions under the Treaty on the Functioning of the European Union; and
- investigate markets and make references under the Enterprise Act 2002 to the Competition and Markets Authority (CMA).

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

A2. Ongoing work

A2.1 Our broader programme of ongoing work plays an equally important role in achieving our duties and goals and underpins the regulation of our sectors.

Maintaining effective communications networks and enabling spectrum use

A2.2 Making sure people and businesses have communications networks that serve their needs is a central part of our work. This includes making sure physical and spectrum infrastructure is effective, resilient and ready for the future as well as maintaining the systems that have supported UK communications until now.

- **Moving to digital lines.** As fibre-based services are rolled out and communications providers plan to retire the copper-based public switched telephone network (PSTN), consumers and businesses will increasingly move to digital lines where voice calls are carried over broadband. We will work with providers to help ensure issues raised by this migration are identified and addressed to protect consumers from harm and minimise disruption.
- **Effective Openreach reform.** We monitor the legal separation of Openreach from BT and report annually on BT's and Openreach's compliance with BT Group's commitments. We are monitoring the impact that the separation arrangements are having on our broader objectives, set out in the 2016 Strategic Review of Digital Communications, to enable access to fast, reliable broadband through investment in competing networks. We plan to publish a report on overall outcomes in 2021/22 which will assess the effectiveness of actions taken to: benefit consumers, address our competition concerns and encourage new investment in networks.
- **Monitoring the quality of wholesale telecoms services.** We will continue to monitor the provision and repair of copper and fibre-based wholesale telecommunications services.
- **Authorising spectrum use.** Ofcom provides advice and assistance to a wide range of spectrum users. Our specialist spectrum teams carry out detailed technical analysis and real-world measurements to optimise the use and sharing of spectrum. We investigate reports of harmful radio interference (including to safety-of-life communications), and use targeted, proactive enforcement to both identify and resolve unauthorized use of spectrum and 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, including interactive geographical spectrum maps to enable businesses and organisations to better understand how spectrum is used. We also analyse use of spectrum across specific sectors to support our strategic reviews and inform our policy.

- **Managing spectrum and planning for future requirements.** Ofcom has a duty to ensure UK radio spectrum is used in the most efficient way. We do this by planning for future spectrum requirements for services including satellite, utilities and transport.
- **Providing specialist support.** Our spectrum teams also provide specialist support to major UK state and sporting events, and grant radio licences to a diverse set of users to enable access to spectrum and promote innovative services.
- **Allocating and managing telephone numbers.** Ofcom allocates telephone numbers to communications providers, which then issue these to consumers and businesses. We ensure efficient use of numbers, reducing disruption and cost.
- **Legacy universal services.** The European Electronic Communications Code requires member states to carry out three-yearly reviews of any legacy universal services that they wish to retain. The first such review must be completed by 21 December 2021. The UK Government has indicated that it will require Ofcom to carry out these reviews. We will therefore commence a review of legacy universal service obligations, including public call boxes, itemised billing and printed directories.

Protecting and understanding consumers

A2.3 UK consumers remain at the heart of our work. We will continue to work to protect people and understand their needs.

- **Better broadband and mobile wherever you are.** We are continuing our work to improve access to communications services in the hardest-to-reach and most remote locations. Our work on the universal broadband service and the mobile operators' Shared Rural Network will help address this issue. We will continue to collect evidence and produce high-quality analysis to inform public policy and decision-makers. We will also ensure that people have the information they need to make informed decisions about how to improve their communications services.
- **Making sure consumers' voices are heard.** We will continue to engage with the public through our consumer contact team, which provides support and advice to people and businesses. We will also continue to work with a wide range of consumer groups and continue to strengthen the Communications Consumer Panel, the independent consumer body for the telecoms sector. We will increase the budget available to the panel for 2020/21, enabling it to look at a broader programme of work and advocate for consumers with a stronger voice.
- **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. To tackle scams specifically, we have been working in collaboration with the Financial Conduct Authority by supporting Stop Scams UK, an initiative which aims to bring together financial services, communications providers and social media organisations, to coordinate an industry led response to scams. This programme had its official industry launch in March 2020.

- **Comparing quality of service.** Ofcom's annual report, Choosing the Best Broadband, Mobile and Landline Provider, looks at communications providers' quality of service. We will also continue to produce quarterly publications on complaints made to Ofcom against the largest telecoms and pay-TV providers.
- **Supporting consumers in communications markets.** We will monitor the effectiveness of schemes which Ofcom approves or oversees, such as alternative dispute resolution bodies.

Supporting UK broadcasting

A2.4 Our work to support the broadcasting industry includes Ofcom's licensing work and ensuring compliance with broadcasting standards. We also work to make sure that the requirements placed on the BBC are met, and monitor the BBC's impact on competition.

- **Licensing TV and radio broadcast services.** We will continue to issue licences for all UK national and local commercial TV services, and all analogue, digital commercial and community radio services. This helps secure a range and diversity of services available across the UK. We can impose penalties when licence requirements are not complied with, and, in serious cases, can revoke licences.
- **Small-scale DAB.** Having now published our plans for the implementation and licensing of small-scale DAB, we will advertise the first small-scale radio multiplex licences as soon as practicable.
- **BBC monitoring.** To protect fair and effective competition and to assess the BBC's delivery against its mission and public purposes, we monitor the BBC's activities (including its future plans) using a range of information.
- **Enforcing the BBC's requirements.** Where appropriate, we will enforce specified requirements that apply to the BBC under the Charter and Agreement and the Operating Framework set by Ofcom.
- **Enforcing requirements for access services.** We will continue to ensure that broadcast and on-demand programme services provide a proportion of their programmes with access services (subtitling, signing and audio-description) for people who are visually or hearing impaired. We continue to work with broadcasters and streaming service providers to address other issues such as the quality and usability of access services.
- **Enforcing programme standards.** We will continue to ensure that programmes broadcast on TV and radio meet the standards set out in the Broadcasting Code. These include rules on harm and offence, crime, religion, due accuracy and due impartiality, fairness and privacy and commercial references. We assess complaints from viewers and listeners. We also check for, and identify, breaches of our rules through targeted monitoring. If a breach is serious, repeated, deliberate or reckless, we can impose a statutory sanction on the broadcaster. This can include a financial penalty, and, in the most serious cases, we can revoke its licence to broadcast.
- **PSB prominence.** Revisions to the EPG Code (electronic program guide) on the prominence of PSB television channels are due to come into effect in January 2021. We are also continuing to work

with DCMS, broadcasters and the wider industry on how our recommendations for prominence for on demand PSB could work in practice.

- A2.5 We regulate content on the BBC's TV channels, radio stations, iPlayer and the BBC website. We consider complaints referred to us if the complainant is not satisfied with its resolution by the BBC, but we can also step in earlier if necessary. For online material on the BBC website and apps, complaints can be referred to us for our opinion.
- A2.6 We also regulate 'video-on-demand' streaming services established in the UK. These must meet a set of editorial standards which cover the protection of children, hate speech and commercial references.
- A2.7 Audience expectations for standards on broadcast and on-demand services evolve over time. We are planning to continue carrying out research on expectations for standards, which help us to apply proportionate rules that reflect changing audience attitudes.

Monitoring the postal market

- A2.8 Ensuring the sustainability of the universal postal service and understanding the changing postal market is an important part of our work. We will continue to deepen our understanding of the market and postal customers in preparation of our next review of the regulatory framework for post.
- **Monitoring the postal market and Royal Mail's performance.** We will continue to monitor Royal Mail's performance on efficiency and quality of service, the financial performance of the universal service network, and competition in parcels and letters. We will also monitor consumers' experiences in the postal sector. We will continue to report on these trends in the postal market.

Effective and robust enforcement

- A2.9 Our wider programme of work and the priority areas set out in Section 3, are supported by our commitment to fostering a compliance culture among UK communications providers. We monitor complaints, analyse evidence, engage with industry and take action where necessary, ensuring that our decisions are enforced and that consumers are protected from harmful practices.
- A2.10 We continue to enforce our rules to ensure that consumers are protected and that communications providers are aware of their regulatory obligations. We monitor communications providers' compliance with network security obligations to reduce the risk of breaches.
- A2.11 We monitor use of the airwaves and respond to reports from both people and businesses. We identify sources of interference and provide advice to resolve, but take enforcement action if needed. We also monitor wireless equipment on the market to ensure it complies with relevant standards and does not cause problems for other spectrum users. We undertake investigations and take enforcement action when appropriate.

Deepening and sharing our understanding of communications

A2.12 Our work is informed by our understanding of our sectors and people's expectations relating to communication services, allowing us to plan effectively and adapt to the changing communications environment.

- **Market research and market intelligence.** We research communications markets and consumer preferences and behaviour. This provides an up-to-date, thorough understanding of people and businesses in the markets we regulate. We collect data directly from industry and make it available through publications and our website.
- **Publishing our annual suite of research reports.** These will report on internet coverage and speeds, online services and the media industry. We will work to make our information more relevant and user-friendly; data will be published in each case in our accompanying visualisation tools and online tools.
 - **Connected Nations report.** We will continue to report on the availability and estimated speeds for superfast and gigabit-capable fixed broadband and mobile networks in our annual report, which also features a version for each of the devolved nations. We plan to publish the main report in Q3/4.
 - **Media Nations report.** This is our annual report on TV (including public service broadcasting and all video services) and radio, which also features a version for each of the devolved nations. We plan to publish the main report in Q2.
 - **Online Nation report.** This is our annual report on online services, which will now be in its second year. We plan to publish the main report in Q1.
- **Media literacy.** We will publish annual reports on media use, attitudes and understanding of adults and children. We will look in detail at children's online behaviour and attitudes, putting their own views and interests to the foreground, as well as getting a clear picture of their concerns and issues. We will review and develop our suite of media literacy research to ensure it provides timely, accessible findings to help people, businesses and organisations. In doing so, we will collaborate with national and international partners to better understand these issues and help shape and inform the debate.
- **Monitoring technological and commercial developments to prepare for the future.** We will continue to monitor technological developments and changes in the communications market, including changing consumer behaviour and expectations. This will be used to inform our policy work and decision-making, helping to ensure that people and businesses benefit from technological innovation in the sectors we regulate.

Engaging with other bodies

A2.13 Working with the UK Government, devolved governments, other regulators and bodies, both UK-based and international, helps us to improve outcomes for UK consumers through knowledge sharing and coordinated action.

- **Working with the UK Government, devolved governments and administrations, and other bodies, on audience protection.** We engage with governments, industry and other bodies to protect audiences, across traditional and online environments. We sit on the Government's UK Council for Internet Safety (UKCIS) and work closely with other regulators across Europe to improve protection of audiences of audiovisual services.
- **Working with the UK Government, devolved governments and administrations, and other bodies, on network infrastructure.** We engage with governments and administrations, and a range of other bodies across the UK, advising on technical issues. We advise the UK Government, devolved governments and administrations on availability of services, and in the support we provide for improving mobile coverage across the UK. We work with other regulators to address common infrastructure challenges across different sectors, through our work as a member of the UK Regulators Network (UKRN).
- **Engaging with international organisations.** We engage with a range of international organisations involved in communications regulation, to learn from their experiences and to help ensure that emerging policy thinking and any relevant international obligations that apply in the UK meet the needs of our communications sector.

A3. Project work for 2020/21

A3.1 Below, we set out our work plan for 2020/21. We provide detail on the projects underpinning our priority work areas.

Better broadband and mobile – wherever you are

Project details	Milestones
<p>Broadband Universal Service UK and devolved Obligation (USO). The broadband universal service obligation has now launched. Ofcom has designated two universal service providers (USPs) to deliver the service; established the obligations that USPs must meet to deliver the scheme in accordance with the legislation; and made proposals to determine how the costs incurred by a USP may be compensated. Consumers have been able to request the service since March 2020. 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 future.</p>	<p>Statement on funding regulations Q1 2020/21</p>
<p>Wholesale Fixed Telecoms Market Review. We published our main consultation on our proposals for fixed telecoms services in early 2020, and intend to publish our final statement in Q4 2020/21. This will cover wholesale voice/broadband connections and wholesale leased lines. We are seeking to establish a regulatory framework designed to promote network competition where this is feasible, ultrafast network coverage and enable the smooth replacement of the legacy copper network with fibre services. Any remedies will come into effect from Q1 2021/22.</p>	<p>Statement Q4 2020/21</p>
<p>Wholesale Calls and Interconnection. We will undertake the next round of market reviews for fixed, mobile and 070 call termination and fixed call origination. As part of this review we will be considering what is necessary to assist the transition from traditional PSTN (public switched telephone network) services to IP-based voice services including arrangements for Interconnection. We will consult on formal proposals in Q2 2020/21. Any changes to regulation are likely to come into effect from Q1 2021/22.</p>	<p>Consultation Q2 2020/21 Statement Q4 2020/21</p>
<p>Telecoms regulation in the Hull Area. We will consult on our proposals for fixed telecoms services in the Hull Area in Q1 2020/21, and intend to publish our final statement in Q4 2020/21. This will cover all wholesale voice/broadband and leased-line markets. Any remedies will come into effect from Q1 2021/22.</p>	<p>Statement Q4 2020/21</p>

<p>Award spectrum bands as they are cleared and released. We are ready to award licences in the 700 MHz and 3.6-3.8 GHz spectrum bands by auction, and aim to ensure any external action which might delay the auction, including through legal challenges, are dealt with as quickly as possible.</p>	<p>Auction 2020/21</p>
<p>700 MHz clearance programme. We will continue to work to clear digital television services from the 700 MHz band in order to release this spectrum for mobile data. We will continue to administer a grant scheme to fund incremental costs that broadcasters incur as a result of the infrastructure changes associated with 700 MHz clearance. The coronavirus pandemic has resulted in significant restrictions on travel and the need for social isolation. The decision has been taken to postpone carrying out the final two 700 MHz clearance events scheduled for April 2020. As a result, the 700 MHz clearance programme will now be paused until restrictions due to the coronavirus are relaxed. We are working with programme stakeholders to determine a revised timetable for delivering clearance of the 700 MHz band.</p>	<p>Update on 700 MHz clearance Q2 2020/21</p> <p>Final update on 700 MHz clearance Q3 2020/21</p>
<p>Enabling additional spectrum for mobile including 5G services. We will engage internationally at both European and global level to ensure that technical conditions for the priority spectrum bands are appropriate for mobile, including 5G services. We will work to understand future mobile spectrum demand. We will progress our work to open access to more spectrum for radio local access networks (RLAN) including wifi. We will continue to engage with industry to support the expanding role of wireless innovation across different sectors.</p>	<p>Statement on RLAN Q2 2020/21</p>
<p>Improve mobile coverage. We will continue to support the UK Government and the mobile operators in the delivery of the Shared Rural Network, as well as playing our role in holding operators to account on their licence obligations. As part of this we will continue to report publicly on mobile operators’ progress in improving coverage. We are taking action to enable spectrum-based solutions that could be used to improve coverage both indoors and in rural communities. This will include licence exemption for mobile phone repeaters, where we will bring forward proposals to extend them to more frequency bands, include other technologies (e.g. 5G) and remove unnecessary restrictions. We will also take a look at options for making multi-operator femto cells licence exempt. Both of these actions will help consumers who are currently suffering from poor mobile phone coverage in their own homes to improve mobile reception for themselves, without the need for operator intervention. We will</p>	<p>Consultation (mobile phone repeaters) Q3 2020/21</p>

continue to explore options to improve coverage in buildings, in cars and on trains.	
Spectrum sharing. We will look at implementing an automated authorisation approach for access to the shared bands to ensure that the shared spectrum is used effectively and efficiently.	Ongoing
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. We will analyse crowd-sourced data to examine how mobile network performance varies by a range of factors including technology, mobile network operator, geography and time of day.	Home broadband performance report Q1 2020/21 Mobile broadband performance report Q3 2020/21
Spectrum management strategy. We will review and update our spectrum management strategy and set out a plan for implementing changes.	Spectrum strategy consultation Q2 2020/21 Statement Q4 2020/21
Supporting innovation in the 100-200 GHz range. We will publish a statement on supporting innovation in this spectrum range.	Statement Q2 2020/21
Future regulatory financial reporting. We will publish our final decisions in relation to BT’s financial reporting obligations arising from the Wholesale Fixed Telecoms Market Review.	Statement Q4 2020/21
Ex-post evaluation. We will publish an in-depth evaluation of the impact of our quality of service obligations on Openreach’s service level performance. In future, we plan to publish at least one in-depth evaluation of our previous policies annually.	Annually

Fairness for customers

Project details	Milestones
Coronavirus response to protect vulnerable customers. We will proactively monitor and intervene where necessary to protect consumers during this crisis, with particular focus on protecting those who are vulnerable.	Ongoing

<p>Fairness for Customers commitments. We will continue to monitor companies' performance against these commitments. We will also publish a progress report, reviewing whether companies are delivering what they have promised. This is alongside our regular reporting on customer complaints and satisfaction.</p>	<p>Report Q4 2020/21</p>
<p>Broadband differential pricing practices. We are continuing our work to ensure more broadband customers are on fair deals. We will monitor customer outcomes following the implementation of voluntary pricing commitments from industry.</p>	<p>Publication Q2 2020/21</p>
<p>Affordability of broadband services. We will continue to monitor where households have difficulty paying for communications services, in particular in relation to broadband and consider if any measures are needed to support consumers who are financially vulnerable. If we identify a potential need for a targeted tariff to protect those in low income homes, we would work with the Government to consider how such a tariff might be implemented.</p>	<p>Publication Q3 2020/21</p>
<p>Consumer information on gigabit-capable / ultrafast broadband. People and businesses need the right information to make informed decisions about the broadband services best for them. We will consider the benefits of more information about the characteristics and capabilities of gigabit-capable / ultrafast fixed and mobile broadband technologies and how it should be communicated.</p>	<p>Ongoing</p>
<p>Monitoring the impact of end-of-contract and annual best tariff notifications. From February 2020, broadband, mobile, landline and pay-TV companies are 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 expect these notifications to have a significant positive impact in helping customers engage with the market and take advantage of the wide choice of offers available. We will be reviewing how providers have implemented these notifications, their impact on customer behaviour and whether consideration of other remedies, such as collective switching, may be appropriate.</p>	<p>Ongoing</p>
<p>Participation and vulnerability. We 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. We will finalise our guide to treating vulnerable consumers fairly and contribute to joint policy work with the UK Regulators Network to improve outcomes for vulnerable consumers.</p>	<p>Ongoing</p>

<p>Open communications. We are developing proposals for an open communications initiative. This would enable people and small businesses to share data about their use of telecoms (such as their current tariff or data usage) with third parties to help them navigate the market and get a better deal.</p>	<p>Consultation on Open Communications Q2 2020/21</p>
<p>Personalised pricing. We will publish a discussion document on personalised pricing, including the use of data and algorithms that support these practices.</p>	<p>Discussion document Q2 2020/21</p>
<p>Price comparison service accreditation scheme. We will conclude our review of our accreditation scheme for price comparison websites to make sure it continues to work for consumers in the modern market, and to ensure alignment with the objectives of the European Electronic Communications Code.</p>	<p>Statement Q2 2020/21</p>
<p>Reporting on pricing trends. We will report on pricing trends in fixed, mobile and pay-TV services. This will include a review of the prices available to consumers buying different types of services and a summary of what, on average, consumers are paying. It will also look at tariff structures and how 'discounted' prices vary from standard or 'list' prices, as well as the difference between in-contract and out-of-contract prices.</p>	<p>Publication Q4 2020/21</p>
<p>Review of the General Conditions and Universal Service Conditions to implement the European Electronic Communications Code. We will confirm our plans for implementing the end-user rights section of the European Electronic Communications Code, within the context of our broader Fairness for Customers work programme. We have set out a number of proposed changes to our regulatory rules, including new rules on switching and porting, handset locking, accessibility for disabled customers and contract information. We also expect to begin a review of legacy universal service obligations which needs to be completed by the end of Q3 2021/22.</p>	<p>EECC statement Q2 2020/21</p> <p>Switching process consultation Q2 2020/21</p> <p>Switching process statement Q3/Q4 2020/21</p> <p>Consultation on legacy USO services Q4 2020/21</p>
<p>Improving consumer information on fixed and mobile coverage and performance. We continue to provide consumers with accurate and comparable information on fixed and mobile networks via our online checker. We are exploring the options to improve how these consumer-facing tools work, so they remain relevant and accessible. We will continue to review the information that we make available to consumers and take action to improve our metrics.</p>	<p>Ongoing</p>

<p>Migration to voice-over-IP services. We will work with communications providers to help make sure issues raised by their migration to voice-over-IP services, including the potential future switch-off of the PSTN, are identified and addressed with the aim of protecting consumers from harm and minimising disruption.</p>	<p>Ongoing</p>
<p>Fairer mobile handset pricing. We are continuing our work to ensure fairer, more transparent prices for customers buying mobile handset contracts. In July 2019, alongside our findings on bundled mobile handset contracts, we also consulted on proposed changes to contract durations when handsets are sold with a link to a mobile airtime contract (known as linked split contracts). We will conclude on our proposals as part of the Review of the General Conditions and Universal Service Conditions to implement the European Electronic Communications Code.</p>	<p>Statement Q2 2020/21</p>
<p>Standalone landline services. BT implemented price reductions for its customers buying landline services in a standalone contract in April 2018. Its commitments expire in Q4 2020/21 and we will consider what appropriate protections are necessary in the future to ensure that these customers receive value for money for the landline services they buy.</p>	<p>Document to be published Q3/Q4 2020/21</p>
<p>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.</p>	<p>Ongoing</p>

Supporting UK broadcasting

Project details	Milestones
<p>Public service broadcasting programme: Small Screen: Big Debate. We will consider the role of public service broadcasting in a fast-changing media landscape, and impacted by the coronavirus pandemic, by facilitating the ‘Small Screen: Big Debate’ with industry, the UK and devolved governments, Parliament, viewers and listeners.</p>	<p>Consultation Q3 2020/21</p>

<p>Ofcom’s annual report on the BBC. We will set out how we have carried out our duties and assess the BBC’s compliance with the specified requirements in the Operating Framework and Operating Licence. We will also publish a report measuring the BBC’s performance in meeting its mission and public purposes across its public services.</p>	<p>Report Q3 2020/21</p>
<p>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.</p>	<p>Ongoing</p>
<p>Monitoring the BBC’s commercial activities. The BBC’s commercial activities are required to earn a commercial rate of return over an appropriate period to ensure 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.</p>	<p>Ongoing</p>
<p>BBC Studios review. We are reviewing the evolution of BBC Studios, including how it has implemented our trading and separation requirements. We will publish the findings of our review by the end of 2020/21.</p>	<p>Report Q4 2020/21</p>
<p>Responding to Channel 4 Corporation’s annual Statement of Media Policy. We will publish our response to Channel 4 Corporation’s delivery of its media content duties and plans for the following year as set out in its statement.</p>	<p>Report Q1 2020/21</p>
<p>Reporting on adults’ media literacy. We will publish our annual Adults’ Media Use and Attitudes report, looking at media literacy among UK adults. It will include data on the media use, attitudes and understanding of adults aged 16 and over, and how these are changing over time. Alongside this, we will publish our annual Adults’ Media Lives report, detailing the findings from our small-scale, longitudinal, ethnographic qualitative research among UK adults – a complement to our quantitative surveys on adults’ media literacy.</p>	<p>Report Q1 2020/21</p>

<p>Reporting on children’s media literacy. We will publish our annual Children’s Media Use and Attitudes report, providing evidence on media use, attitudes and understanding among children and young people aged 5-15, as well as information about the media access and use of children aged 3-4. The report will also include parents’ views about their children’s media use, and the ways parents monitor or limit children’s use of different types of media. Alongside this, 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 – a complement to our quantitative surveys on children’s media literacy.</p>	<p>Report Q4 2020/21</p>
<p>Participants in programming. We have been considering amendments to the Broadcasting Code to make sure broadcasters provide due care to programme participants, where required. Our first consultation closed in autumn 2019 and we revised our approach and published a second consultation on 10 March 2020. We aim to publish new rules and a statement later in 2020.</p>	<p>Consultation Published March 2020, Closes Q2 2020/21 Statement Q2/Q3 2020/21</p>
<p>Media Nations. We will publish this annual report on key trends in the television and video sector, as well as the radio and audio sector.</p>	<p>Q2 2020/21</p>
<p>Small-scale DAB. We will advertise the first small-scale radio multiplex licences as soon as practicable.</p>	<p>Ongoing</p>
<p>Advertising policy and regulation. The Government has consulted on additional restrictions on TV advertising for food and drinks high in fat, salt and sugar (HFSS), including a pre-watershed ban, with a statement expected in due course. If tighter restrictions are introduced, Ofcom and its co-regulators (BCAP and the ASA) would be required to administer this.</p>	<p>Subject to Government consultation/statement</p>
<p>Review of requirements to support fair and effective competition in the provision of EPGs. As required by the Digital Economy Act 2017 we will review the requirements we have imposed on EPG licensees to ensure fair, reasonable and non-discriminatory behaviour.</p>	<p>Q3 2020/21</p>

Making sure online communications work for people and businesses

Project details	Milestones
<p>Video-sharing platform regulation. The new Audiovisual Media Services Directive (AVMSD) introduces requirements for 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. The UK Government has appointed Ofcom to act as the regulator for UK-established VSPs ahead of the full legislation on online harms. In developing guidance for the VSPs, we will seek views from companies, experts and the public through a consultation later this year once the necessary legislation has passed.</p>	<p>Call for inputs Q2 2020/21</p> <p>AVMSD transposition Q2 2020/21</p> <p>Consultation Q3 2020/21</p>
<p>Preparing to regulate online harms. On 12 February Government announced that it is minded to appoint Ofcom as the new regulator for online harms. If confirmed, these proposed new responsibilities would constitute a significant expansion to our remit, and preparing for them will be a major area of focus in 2020/21 and beyond. The timing of this work will depend on the UK Government's process for making final decisions and introducing new legislation. In the meantime, we will continue providing technical advice and input to policy development by the Government.</p>	<p>Ongoing / legislation to be introduced to Parliament later in the year</p>
<p>Making sense of media. We will continue our work to help improve the online skills, knowledge and understanding of UK adults and children through providing robust research and collaborating with relevant businesses and organisations and their activities.</p>	<p>Development of research programme, plus MSOM Panel / Network engagement Q2/3 2020/21</p>
<p>Number-independent interpersonal communications services (NIICS). We will carry out and publish research to understand the services that comprise the NIICS market, as well as consumers' experience of these services, in the context of new provisions under the EECC due to come into force in Q3 2020/21.</p>	<p>Research findings Q1 2020/21</p>
<p>Online Nation. We will publish this annual report on what people are doing online, how they are served by online content providers and platforms, and their attitudes to and experiences of using the internet.</p>	<p>Q1 2020/21</p>

Enabling strong, secure networks

Project details	Milestones
<p>Continuing to ensure communications providers and operators of essential services are managing security risks. We will work with the UK Government to implement the outcomes of the telecoms supply chain review, working closely with industry, including suppliers to ensure that the networks people and businesses rely on remain resilient. We will aim to ensure that all communications providers in scope of the telecoms security requirements adhere to guidance relating to the requirements. We will identify best practice and gaps in standards and lead on initiatives to close the gap. We will continue to engage with communications providers to carry out a threat intelligence-led penetration testing scheme (TBEST) which assesses how well a company stands up to a concerted attack based on the techniques known to be used by cyber criminals and hostile nation states.</p>	Ongoing
<p>Building cyber security capability. We will continue to build our cyber security capability and ensure communications providers and operators of essential services are managing security risks.</p>	Ongoing

Sustaining the universal postal service

Project details	Milestones
<p>Review of user needs. We will look at user needs and assess whether the postal services market is meeting the reasonable needs of the people who use it.</p>	Report Q3 2020/21
<p>Review of the future regulatory framework for post. In 2017, we said that our approach to postal regulation should remain in place until 2022. During 2019/20 we have been carrying out a number of projects which form the building blocks for the 2022 review. This includes a review of user needs, an assessment of the parcels market, bottom up cost modelling and a review of Royal Mail's efficiency. During 2020/21 we will bring this work together under this umbrella review. Incremental pieces of work will be required: e.g. reviewing access competition and whether extra consumer protections are required.</p>	Concludes in 2022

Continuing to innovate our approach to regulation to help people and businesses

Project details	Milestones
<p>Data Innovation Hub. We will continue to build a central team to contribute to data science initiatives and support colleagues around the organisation to maximise insight and efficiency from data related activities. This will improve our tools and processes to support policy development.</p>	Ongoing
<p>Testing a new approach to improve UK telephone number management and improving trust in telephone numbers. Phone numbers convey information about who is calling when displayed on devices like smartphones. People can use this information to decide whether or not to answer calls. That identity information must be trustworthy but it is under threat by fraudsters spoofing phone numbers to carry out scams. Following collaboration with industry to test the use of innovative blockchain technology as a future-proofed approach to number management, we will set out our initial assessment of proposals to change the way numbers are used by modern networks, which we believe is necessary to tackle nuisance and scam calls. Our proposals could also support better processes for porting numbers and routing calls to these numbers when customers switch between competing providers, as well as improve number management.</p>	Consultation Q2 2020/21
<p>Salisbury copper retirement trial. We will provide support to Openreach's copper retirement trial in Salisbury, using our convening power to support the trial in protecting vulnerable consumers and users of special services, so that lessons from the trial can support wider investment in new networks.</p>	Ongoing
<p>Emergency call handling performance. We will review and, where necessary, propose improved capabilities for emergency call handling, so people have confidence in being able to contact the emergency services.</p>	Ongoing
<p>Innovation in regulatory approaches. We will identify new opportunities to innovate in our approach to regulation. In particular we will adopt new approaches to policy-making and explore ways to improve how we work and foster innovation. We will attend the Nesta-run States of Change program with our New Comms 2020 team, use current projects as test-beds to trial new policy techniques and improve the use and promotion of existing innovation at Ofcom.</p>	Ongoing

Increasing diversity and inclusion

Project details	Milestones
<p>Diversity and Inclusion Report. We published our first progress report on our 2018-2022 Diversity and Inclusion programme in July 2019. This programme outlines the diversity and inclusion actions we will take, including a detailed account of our objectives and programme of work, both as an employer and as the UK's communications regulator. An update on our strategy will be published later in the autumn. We will also confirm new five-year diversity targets for Ofcom, as the current targets which were set in 2015 expire at the end of 2020. We will also publish our annual diversity report, which looks at diversity and equality at Ofcom, in the autumn. 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.</p>	<p>Report Q3 2020/21</p>
<p>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.</p>	<p>Report Q4 2020/21</p>
<p>Monitoring diversity and equality of opportunity in broadcasting. We will continue to report on diversity in the UK TV and radio industries to provide a comprehensive picture of how well individual broadcasters – and the industry as a whole – are promoting equality of opportunity, diversity and inclusion within their organisations.</p>	<p>Annual report Q3 2020/21</p>
<p>On demand programme services (ODPS) accessibility code. Following the introduction of new requirements in relation to accessibility of ODPS, we will publish our ODPS accessibility code.</p>	<p>Anticipated Q4 2020/21</p>

Support through the EU exit transition period and continued international relationships

Project details	Milestones
<p>Implementation of relevant European legislation. We will work with the UK Government to support its transposition of relevant European legislation into national law. In doing this, we will work to ensure that legislation is proportionate and appropriate, reflects the challenges facing the sector and meets people’s needs now and in the future.</p>	<p>Ongoing</p>
<p>Strategic implications of the changing nature of our relationship with the EU. We will provide advice to the UK Government as required to support its discussions with the EU on the detail of our future relationship. Where relevant, we will also provide advice on any legislative changes needed to underpin the future relationship between the UK and the EU. As the process evolves, we will continue to engage with the businesses and organisations we regulate to understand their positions and priorities.</p>	<p>Ongoing</p>