

Reference: 02175295

Information Requests
information.requests@ofcom.org.uk

15 April 2026

Freedom of Information request: Right to know request

Thank you for your request for information about concentration in digital platforms markets.

We received this request on 17 March 2026 and we have considered your request under the Freedom of Information Act 2000.

Your request & our response

Please could I request recorded information held by Ofcom relating to market concentration in digital platforms and internet infrastructure.

Please provide the following, created between 1 January 2024 and the present:

In responding to this request for internal assessments, we have applied the following meanings to the service expressions it contains:

- **digital platform services** – services that are made available by means of the internet, such as those enabling users of the service to generate, share or upload content; search services or other services for exchanging information, goods or services, such as social media channels; online marketplaces; media-sharing platforms; knowledge platforms;
- **cloud infrastructure services** – services giving customers access to shared computing resources on demand so that the customers do not need to own the underlying hardware and software;
- **internet access (infrastructure) services** – services that provide access to the internet by ISPs to customers and thereby connectivity to virtually all end points of the internet, irrespective of the network technology and terminal equipment used.

1. Internal assessments

Any reports, briefings, or summaries assessing concentration in digital platforms, cloud infrastructure, or internet services.

Information on the use of social media/online communication services can be found in Ofcom's [Online Nation 2025](#) report.

Regarding cloud services, we have no information that is within the scope of your request. However, in April 2023, Ofcom published the findings of its [market study on cloud services](#). No further information has been gathered since this date. You can also view the [market share annex](#) and the [market reference notice](#).

More recently, the Competition and Markets Authority has published its [cloud services market investigation](#) in 2025, which may contain information useful to you.

Regarding the market for internet service providers, broadband line market share information can be found in Ofcom's [Communications Market Report 2025](#).

Additionally, Ofcom calculated the Herfindahl-Hirschman Index (HHI) for the broadband sector. HHI is a measure of market concentration which ranges from near-zero for a competitive market with a large number of firms with equal market share to 10,000 for a monopoly. The HHI of a sector is calculated as the sum of the squares of the firms' market shares and, according to the data held by Ofcom (which is collected from around 50 fixed telecoms providers), the HHI of the UK fixed broadband sector was 1,792 at the end of 2024, down from 1,863 a year previously.

These figures are overstated as the way in which we calculate the total number of broadband lines (which includes wholesale lines data) results in a higher number of lines than the total number of retail broadband lines that are reported to Ofcom. The difference between the two figures is due to providers that do not submit data to Ofcom – in our HHI calculations we include these 'other' providers as a single firm when, in reality, they will consist of a number of smaller firms. If we were able to calculate the HHIs using these providers' individual market shares, the HHI values would be lower than those shown above.

2. Risk analysis

Any recorded information identifying risks associated with reliance on a small number of large providers.

The cloud market study provided above did not consider the security or resilience implications of market concentration (see [consultation para 2.12](#)). It was a competition-focused assessment, although security and resilience were raised as features of competition: for example, where some providers competed to offer better resilience and security.

3. Strategic or policy considerations

Any internal summaries or briefing material discussing potential regulatory responses or policy approaches to such concentration.

Ofcom does not hold internal communication on this. However, we have published a report which outlines [Ofcom's role in digital markets](#) which may be of interest to you. This document discusses the implications of market power in mobile platforms (particularly Apple and Google) for the mobile broadband market and the implications of market power in other areas, such as online search and other online platforms, for content markets.

Additionally, it discusses the aforementioned cloud services market study and the [personal online communications services report](#) which also may be of interest to you.

Yours sincerely,

Information Requests

[Request an internal review](#)

If you are unhappy with the response you have received to your request for information, or think that your request was refused without a reason valid under the law, you may ask for an internal review. If you do, it will be subject to an independent review within Ofcom. We will either uphold the original decision, or reverse or modify it.

If you would like to ask us to carry out an internal review, you should get in touch within two months of the date of this letter. There is no statutory deadline for us to complete our internal review, and the time it takes will depend on the complexity of the request. But we will try to complete the review within 20 working days (or no more than 40 working days in exceptional cases) and keep you informed of our progress. Please email the Information Requests team (information.requests@ofcom.org.uk) to request an internal review.

Taking it further

If you are unhappy with the outcome of our internal review, then you have the right to [complain to the Information Commissioner's Office](#).