

# Ofcom's proposed Plan of Work 2020/21

Making communications work for everyone

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

**CONSULTATION:**

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# 1. Overview

This document sets out **Ofcom's proposed work plan and priorities** for the next financial year.

During the coming year, we expect continued growth in the use of online services, such as smart home technologies and online video content. This will drive the need for fast and reliable access to the internet. The reach and quality of broadband and mobile networks are likely to continue to improve, through a combination of commercial investment and Government support. Ofcom is committed to supporting communications improvements as well as supporting UK broadcasting, fairness for customers and sustaining the universal post service. Our work will reflect all of these themes.

Ofcom's final Plan of Work, published in March 2020, will take into account responses from stakeholders to this document.

## Our strategic priorities for the next financial year

- **Better broadband and mobile – wherever you are:** we will support ongoing investment in faster broadband and better mobile coverage across the country.
- **Fairness for customers:** we will ensure broadband, phone and TV customers, particularly vulnerable people, are treated fairly.
- **Supporting UK broadcasting:** we will support the UK's vibrant broadcasting sectors, including public service broadcasting, to deliver continued benefits to all UK audiences.
- **Ensuring online communications work for people and businesses:** we will work with Government on new and emerging policies protecting consumers from harmful content online, and more generally ensure communications services online work for consumers.
- **Enabling strong, secure networks:** we will build a centre of excellence for security and resilience, continue to collaborate with industry to ensure networks are protected against outages or cyber-attacks, and lead on initiatives to close gaps in standards and best practice.

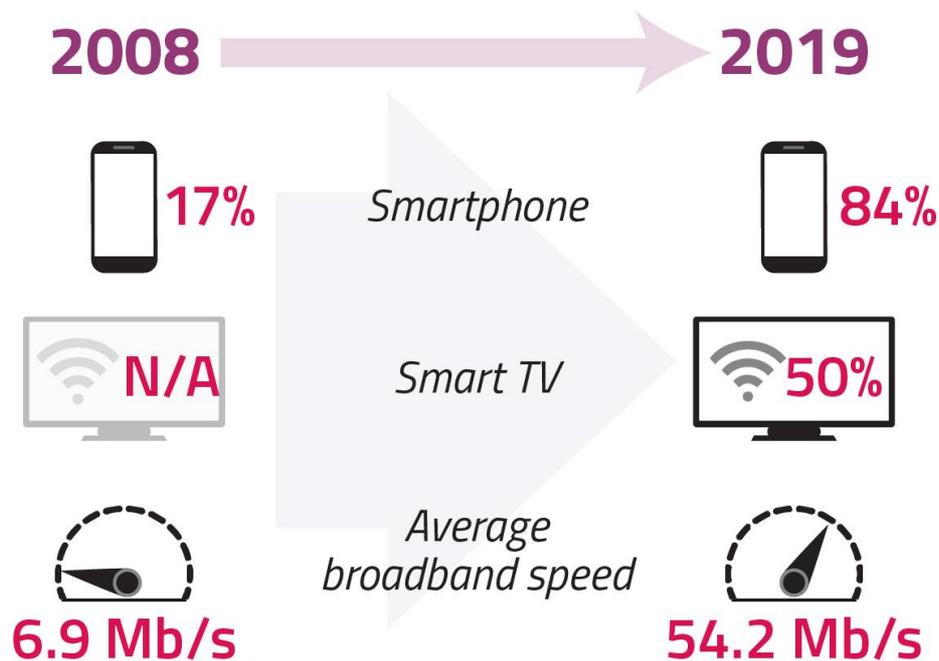
## Areas of focus

- **Sustaining the universal postal service:** we will ensure postal users have access to a sustainable and efficient service.
- **Continuing to innovate in regulation and data to help consumers and businesses:** we will improve our data capabilities to deliver better consumer outcomes and regulation. We will work with stakeholders including other regulators in exploring new regulatory approaches.
- **Increasing diversity and inclusion:** we will increase diversity and inclusion within Ofcom, while challenging broadcasters to do the same.
- **Support through Brexit and continued international relationships:** we will support consumers and industry through changes in the UK's international relationships.

## 2. Market context

### UK consumers are spending more time online, driving the need for more connectivity

- 2.1 Communications are central to how consumers interact with businesses and each other. Nine in ten people are now online, spending an average of 3 hours 15 minutes online every day – 11 more minutes than in the previous year.<sup>1</sup> Most UK consumers are ‘always on’, using around a quarter more data than in 2018, with 315GB being used on average each month per fixed broadband connection.<sup>2</sup>
- 2.2 To keep up with demand and provide a more reliable and secure service, UK communications providers are investing in better networks and leveraging new technologies. UK full-fibre broadband availability has risen to 3 million properties (around 10% of premises, over 1.5 million more properties than last year).<sup>3</sup> This is due to fibre deployment plans including Openreach aiming to cover 4 million premises by March 2021, Virgin Media continuing to roll out fibre via Project Lightning, and a number of new network builders who are beginning to use the enhanced duct and pole access regulation to realise competitive full-fibre rollout across the UK.



<sup>1</sup> [https://www.ofcom.org.uk/data/assets/pdf\\_file/0024/149253/online-nation-summary.pdf](https://www.ofcom.org.uk/data/assets/pdf_file/0024/149253/online-nation-summary.pdf) page 2

<sup>2</sup> [https://www.ofcom.org.uk/data/assets/pdf\\_file/0023/186413/Connected-Nations-2019-UK-final.pdf](https://www.ofcom.org.uk/data/assets/pdf_file/0023/186413/Connected-Nations-2019-UK-final.pdf)

<sup>3</sup> [https://www.ofcom.org.uk/data/assets/pdf\\_file/0024/166650/connected-nations-update-summer-2019.pdf](https://www.ofcom.org.uk/data/assets/pdf_file/0024/166650/connected-nations-update-summer-2019.pdf) page 3

- 2.3 We estimate that as few as 155,000 homes and businesses cannot get decent broadband. The new broadband universal service obligation (USO) launches in March 2020 (subject to eligibility criteria). The broadband USO will ensure that more people can benefit from decent broadband.<sup>4</sup>
- 2.4 All four of the UK's mobile providers launched their 5G services this year, making the UK one of the first countries in Europe where consumers can use 5G. 5G is now available in more than 40 UK cities and available on nine mobile handsets with more cities and handsets set to launch in 2020. 66% of the UK has 4G mobile coverage from all four mobile operators, with 91% having 4G coverage from at least one operator.<sup>5</sup> In October 2019 the UK Government announced in-principle support for the mobile network operators' proposed 'Shared Rural Network'. If final agreement between the Government and industry is reached, operators will share new and existing infrastructure to improve coverage in rural areas.
- 2.5 This increased investment has helped support the continuing shift in the way UK citizens communicate away from traditional methods, like SMS text messaging and broadcast television, and towards over the top services that use the internet. These services are now also delivered to an increasing number of connected devices including smart speakers and wearable technologies, both of which are now owned by around one in five people.<sup>6</sup>
- 2.6 The increasing dependency on communications services makes it imperative that networks are reliable and secure. Communications companies continue to ensure that their networks are strong, secure and protected in the face of continuing outage and cyber-attack risks. The Government's recently concluded supply chain review has provided greater clarity for the telecoms industry on how the UK's telecoms security will be maintained in the future.

## **As more content is being viewed and shared online, traditional broadcasters are adapting to the changing environment**

- 2.7 UK consumers now have more choice in the content that they consume, as well as the ways in which they access their content. The growth of online media players and the take up of smartphones and connected TVs has made it easier for UK consumers to access content when and where it is convenient.
- 2.8 Broadcast content still makes up the majority (69%) of daily video viewing for UK consumers, although this is declining and being substituted for online viewing for some groups. This change is more pronounced for younger viewers and is driven mainly by

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<sup>4</sup> For the broadband universal service obligation, Government has defined decent broadband as a service that can provide a download speed of 10 Mbit/s, and an upload speed of 1 Mbit/s upload. There are other technical features that ensure a quality service.

<sup>5</sup> [https://www.ofcom.org.uk/\\_data/assets/pdf\\_file/0024/166650/connected-nations-update-summer-2019.pdf](https://www.ofcom.org.uk/_data/assets/pdf_file/0024/166650/connected-nations-update-summer-2019.pdf) page 7

<sup>6</sup> <https://www.ofcom.org.uk/research-and-data/multi-sector-research/cmr/interactive-data> page 3

YouTube and subscription video viewing: 16-34s spend only 42% of their viewing time on content from broadcasters.<sup>7</sup>

- 2.9 60% of UK consumers now watch at least one online video service (either subscription or catch-up streaming). Viewing of subscription streaming services has increased by 7 minutes to 26 minutes per day.<sup>8</sup> Broadcasters have responded to changing consumer behaviour, launching their own online video services such as Disney+ and Britbox and by increasing the content available on their online platforms such as iPlayer and All4.
- 2.10 Whilst viewing has shifted, PSB network spend on first-run UK-originated content has remained relatively stable in 2018 at £2.586bn, third party funding for PSB programming in 2018 was at a record £455m. PSBs are partnering with other producers to increase investment in programming, contributing to the highest spend on UK originations since 2010 at £3bn.<sup>9</sup>
- 2.11 Live radio remains popular with a 73% share of total radio listening. Digital listening in the UK continues to grow, at 57% of overall listening. Online listening is the fastest growing, seeing 30% year-on-year growth compared to 1% for DAB. However, DAB accounts for the largest proportion of all listening at 40%, compared to 13% for online.<sup>10</sup> Online listening growth is due in part to smart speaker uptake, which grew by 20% between Q1 2018 and Q1 2019.<sup>11</sup> Digital platforms have helped extend the reach of UK-wide commercial radio, which now reaches four in ten UK adults. However, UK consumers are increasingly spending time listening to music streaming services, presenting a future challenge to the radio industry.

## Ofcom and industry are doing more to protect consumers

- 2.12 Ofcom has taken action to ensure customers are treated fairly, and continues to challenge companies to do more. We welcome voluntary discounts offered by most UK mobile providers to customers who are out of contract on bundled deals. We also welcome new targeted commitments from the UK's biggest broadband companies to protect customers who face barriers to getting better deals. Ofcom has also introduced automatic compensation for customers waiting too long for broadband or landline repairs and installations, and compensation payments for key service quality failures have started. More can be done to improve the treatment of customers, especially for those who are vulnerable. Ofcom and communications companies have started working together to identify and support these customers.
- 2.13 There is a clear need to improve how consumers are protected online. While most internet users (59%) agree that the benefits of going online outweigh the risks, many also have

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<sup>7</sup> <https://www.ofcom.org.uk/research-and-data/tv-radio-and-on-demand/media-nations-2019> page 5

<sup>8</sup> [https://www.ofcom.org.uk/data/assets/pdf\\_file/0019/160714/media-nations-2019-uk-report.pdf](https://www.ofcom.org.uk/data/assets/pdf_file/0019/160714/media-nations-2019-uk-report.pdf) page 4

<sup>9</sup> [https://www.ofcom.org.uk/data/assets/pdf\\_file/0019/160714/media-nations-2019-uk-report.pdf](https://www.ofcom.org.uk/data/assets/pdf_file/0019/160714/media-nations-2019-uk-report.pdf) page 49

<sup>10</sup> [https://www.ofcom.org.uk/data/assets/pdf\\_file/0019/160714/media-nations-2019-uk-report.pdf](https://www.ofcom.org.uk/data/assets/pdf_file/0019/160714/media-nations-2019-uk-report.pdf) page 83

<sup>11</sup> <https://www.ofcom.org.uk/research-and-data/tv-radio-and-on-demand/media-nations-2019/media-nations-2019-interactive-report> page 16

concerns about being online.<sup>12</sup> Much of this concern relates to children, specifically about the types of content and conduct they may be exposed to online. Overall, 61% of adults and 79% of 12-15 year old internet users claim that they have had at least one potentially harmful experience online in the past 12 months. Adults and 12-15 year olds' most commonly mentioned concern is with children's exposure to bullying, abusive behaviour or threats.

## Parcels deliveries continue to grow whilst letter volumes fall

2.14 The volume of letters sent in the post is falling at an increasing rate, dropping by 8% to 10.2 billion items in 2018/19. This compares to a 5% drop in the previous year. Parcel volumes continue to grow, now reaching a total of 2.5 billion items. These changes are driven largely by ecommerce and the replacement of letters by online communication. The ONS reported that internet sales made up 18.0% of total UK retail sales in 2018. This increasing use of ecommerce has driven parcels revenue to over £10 billion in 2018/19.<sup>13</sup> In response to this change UK delivery companies are investing in parcels networks; DHL has announced a major investment in its fleet; Amazon has announced plans to open another fulfilment centre in Chesterfield; and Royal Mail has responded through its parcels network investment strategy, aiming to increase its share of the parcels market and to process larger parcels more efficiently.

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<sup>12</sup> [https://www.ofcom.org.uk/\\_\\_data/assets/pdf\\_file/0028/149068/online-harms-chart-pack.pdf](https://www.ofcom.org.uk/__data/assets/pdf_file/0028/149068/online-harms-chart-pack.pdf) page 72

<sup>13</sup> [https://www.ofcom.org.uk/\\_\\_data/assets/file/0031/177286/2018-19-post-data.csv](https://www.ofcom.org.uk/__data/assets/file/0031/177286/2018-19-post-data.csv)

## 3. Our goals and priorities for 2020/21

- 3.1 Our priority work areas for 2020/21 have been developed in line with the relevant market context and our duties. We set out the priority work areas below, including details and important milestones of the most relevant projects. Our wider plan of work, including these highlighted areas of work, can be found in Annex 2.
- 3.2 The Government has set out its policy priorities in relation to telecommunications, the management of radio spectrum and postal services in the Statement of Strategic Priorities (“SSP”)<sup>14</sup>.
- 3.3 Ofcom must have regard to the SSP when exercising its regulatory functions. We have published [our response](#) setting out how we intend to do so. We have had regard to the SSP when developing this Plan of Work, as summarised below:
- **World-class digital infrastructure.** We are carrying out a range of work under the theme “*Better broadband and mobile – wherever you are*”. This is aimed at promoting competition and investment in new networks and the use of spectrum for the benefits of people and businesses. We share the Government’s commitment to world-class digital infrastructure for the UK, and our work takes account of the conclusions of the Future Telecoms Infrastructure Review.
  - **Furthering the interests of telecoms consumers.** Government’s commitment is to safeguard telecoms consumers’ interests, including the vulnerable and less engaged. Our work on securing “*Fairness for Customers*” including switching, pricing, and the use of consumer data directly supports these outcomes.
  - **Secure and resilient telecoms infrastructure.** Our work programme on ‘*Enabling strong, secure networks*’ directly supports Government’s commitment to ensuring the UK’s telecoms networks and services are secure and resilient.
  - **Postal services.** Our ongoing work in “*Sustaining the universal postal service*”, includes understanding postal users’ needs and reviewing postal regulation., We are having regard to Government’s priorities in this area, including the need for industry and Ofcom to work together to secure the long-term sustainability of the sector.

### Strategic priorities

#### Better broadband and mobile – wherever you are

- 3.4 Access to mobile and broadband in the UK is increasingly essential to many people and businesses across the UK. We want to ensure everyone can access fast and reliable broadband and mobile services, regardless of where they live, work, and travel.

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[https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment\\_data/file/779226/SSP\\_Consultation\\_-\\_Publication\\_Version\\_2\\_.pdf](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/779226/SSP_Consultation_-_Publication_Version_2_.pdf)

- 3.5 We are establishing a regulatory framework that will support investment by a range of providers and promote network competition. We will work in conjunction with central and devolved Government activity to address areas which still have poor connections.
- 3.6 In mobile, all network operators have launched new 5G technology. We will continue to facilitate the launch and development of these services and engage with industry and mobile users, to ensure they are well informed of the benefits of 5G.
- 3.7 During the next financial year our work will include:
- **Encouraging investment in fibre networks.** We will conclude our review of the wholesale telecoms fixed access market, setting regulation for April 2021 to 2026. This review will support investment and competition in gigabit capable services, ensuring world class broadband services are available to as many people and businesses as possible.
  - **Delivering universality of broadband services.** We will implement the broadband universal service obligation to ensure that more consumers in the hardest to reach and most remote locations have access to decent broadband communications.
  - **Helping to improve mobile coverage, particularly in rural areas.** We previously consulted on including two mobile coverage obligations in our forthcoming spectrum auction. The industry has since responded by developing its own proposals for a 'Shared Rural Network' that would see all four operators make binding commitments to provide good quality coverage in exchange for up to £500m funding from the UK Government and an auction without coverage obligations. We will continue to support the Government with technical advice to reach agreement on these proposals and, should final agreement be reached, report regularly on progress made by the operators towards meeting their coverage commitments.
  - **Improving opportunities for spectrum sharing.** We have put in place a process to allow companies, communities or organisations to take advantage of unused licensed mobile spectrum. We will explore how we can further support innovation through a fully automated authorisation approach. These approaches will allow more innovation and the provision of wireless services.
  - **Facilitating the launch of new mobile services for consumers and industry, including 5G.** This financial year we plan to award more spectrum for 5G services (700 MHz and 3.6-3.8 GHz) and monitor the launch and development of 5G and fixed wireless access (FWA) services. We also plan to increase access to licence-exempt spectrum to promote innovation in new services, including for new industrial uses such as automation. For example, we will consult on releasing spectrum between 100-200 GHz. We continue to enable trials through our Innovation and Trial licences. We will also feed into discussions on network security for 5G to ensure secure and resilient mobile networks.

## Fairness for customers

- 3.8 Customers expect to be treated fairly and fairness is a priority for Ofcom. Customers should be confident that fairness is a central part of their providers' culture. We made

significant progress towards this goal in June 2019 when all major broadband, phone and pay-TV companies signed up to our new Fairness for Customers Commitments.

3.9 We expect providers to treat customers, and particularly vulnerable people, fairly and to make fairness central to their corporate culture. We will monitor the impact of the voluntary commitments providers have made as part of our mobile and broadband pricing reviews. In addition, we will begin new work making it easier for customers to get a fair deal. This will include:

- **Putting fairness at the heart of providers' businesses.** We will publish a progress report on the Fairness Commitments, reviewing whether companies are delivering what they have promised.
- **Helping more customers get fair broadband deals.** We will continue to take steps to introduce a social tariff, and will work with Government to consider how such a tariff might be implemented. We will consider the case for a collective switch trial designed to help the least engaged customers, including vulnerable customers.
- **Making data work for consumers.** We will develop proposals for an Open Communications initiative: this would allow customers to share data held by their provider (such as their tariff and data usage) with third parties such as digital comparison tools, to help people navigate the market and get a better deal. We will publish a discussion document on personalised pricing, and monitor use of data and algorithms that support these practices.

3.10 We will also continue work on:

- **Protecting end-user rights and helping consumers switch.** We will confirm our plans for implementing the end-user rights section of the European Electronic Communications Code. We have set out proposed changes to our regulatory rules, including new rules on switching and number porting, handset locking, accessibility for disabled customers and consumer information. We plan to publish a statement in Q1.
- **Helping customers with mobile handset charges.** We are continuing our work to ensure fairer, more transparent prices for customers buying mobile handset contracts. We will conclude on our July 2019 consultation to apply a 24-month limit to handset contracts that are sold with a link to a mobile airtime contract. And we will consider what is needed to ensure that customers are not tied into overly long contracts.

## Supporting UK broadcasting

3.11 We will support the UK's vibrant broadcasting sector to deliver benefits to all UK audiences. This includes our work to ensure that viewers and listeners are protected from hate speech and other content that does not meet the standards of the Broadcasting Code. Public service broadcasters, in particular, are at the cornerstone of the UK media. They are a trusted source of news and current affairs and they are expected to produce high-quality TV content that appeals to a wide range of audiences and tastes. Ofcom has a duty to

monitor the PSBs' performance, ensuring that each delivers on its remit. We can also make recommendations to Government to maintain and strengthen the system.

3.12 During the next financial year, we will undertake a range of work to ensure the PSB system remains fit for the future. We will also continue to review the BBC's performance annually to ensure it is delivering its mission and public purposes, and that it is meeting the requirements set out in the BBC operating licence and operating framework. When appropriate, we will carry out competition assessments on BBC development plans.

3.13 During the next financial year our work will include:

- **Considering the future of the PSB system.** As set out in this year's BBC performance review, we will continue our broad programme to consider the role of public service broadcasting in a fast-changing media landscape by facilitating the 'Small Screen: Big Debate' with industry, Government, Parliament, viewers and listeners. We will build on our assessment of the PSBs' performance over 2014-2018, considering what audiences want from PSB over the next 5-10 years and what is sustainable. Public, industry and stakeholder engagement will be at the heart of this work. We will consult on how the PSB system could be strengthened before making recommendations to Government.
- **Reviewing the evolution of BBC Studios.** We will complete our review of BBC Studios, including how the BBC has implemented our Trading and Separation requirements. This will be informed by issues raised by stakeholders and information gathered under our monitoring programme. We expect to publish the findings of our review in late 2020.
- **Challenging the broadcast industry to improve on diversity.** Diversity in broadcasting remains fundamental to delivering wider value to UK audiences. We have initiatives laid out in our diversity and inclusion focus area, relating to TV and radio overall, and specifically with regard to the BBC.

## Ensuring that online communications work for consumers and businesses

3.14 The continued expansion of the online world has created a wealth of opportunities alongside a range of potential harms. Building upon our work to date, we will continue to deepen our understanding of these harms and the steps we might take to help address them:

- **Informing the online policy debate.** We will continue to use our experience and expertise to help inform the debate about the future of online regulation, through our ongoing engagement with Government and other partners. We will also publish a range of markets based research to develop a more in-depth understanding of the complex way in which online markets affect people's lives.
- **Helping internet users to understand online services and protect themselves from harms online.** As part of our expanded Making Sense of Media programme we will utilise our research programme and network of partner organisations to help raise users' understanding of online services and enable them to protect themselves. This will include working with children and young people to understand how we can

support the aim of improving children's ability to benefit from online services while managing the risks.

- **Ensuring Video Sharing Platforms take appropriate measures to protect users.** Following the Government's consultation earlier this year, on the implementation of the European-wide Audiovisual Media Services Directive, Ofcom is readying itself to take on new duties for regulating video sharing companies based in the UK (such as Snapchat and TikTok). If we are confirmed as the regulator we will develop and consult on a regulatory framework to ensure these companies are taking appropriate measures to: protect children from harmful content; protect the general public from illegal content and content that incites violence or hatred: and respect certain obligations around commercial communications.
- **Understanding new approaches to Number-Independent Interpersonal Communication Services (NIICS) regulation.** Following implementation of the European Electronic Communications Code (EECC), a range of online communications services, such as messaging and email services, are within the scope of communications regulation. We will explore what these services are, how consumers use them and what types of regulation may be necessary.

## Enabling strong, secure networks

- 3.15 Ensuring the safety and security of the UK's communications networks is vital. We will build a centre of excellence for security and resilience, continue to develop our cyber security capability and work with communications providers. This will help ensure networks are resilient and secure and are protected against outages or cyber-attacks.
- 3.16 We continue to work closely with Government, the National Cyber Security Centre and industry to monitor potential risks, providing guidance and advice where possible. In addition to delivering against our existing commitments, we will:
- Work with 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.
  - Ensure all communication providers, in scope of the Government's Telecoms Security Requirements, adhere to Ofcom's guidance relating to the requirements.
  - Work with industry to identify and close gaps in standards and best practice. We will particularly look at converged networks, network stability and network outages.
  - Continue engaging with communications providers to carry out a threat intelligence-led penetration testing scheme (TBEST). This assesses how well a company stands up to a concerted attack based on techniques used by cyber criminals and hostile nation states.

## Focus areas

### Sustaining the universal postal service

3.17 Most people and businesses rely on the universal postal service. Our role in post is to ensure the future of the universal postal service in the light of continuing change in the sector. This includes the decline in letters and the transformation of the parcels sector. We also monitor Royal Mail's finances and performance. The approach to regulation we established in 2012 will remain in place until 2022, as set out in our 2017 review. Our main activities are:

- **Understanding the needs of postal users.** The growth in parcel volumes and decline in letters continue to affect the postal market. In this context, we will assess whether the postal market is meeting the reasonable needs of users. We plan to publish our findings in 2020.
- As one of the **key safeguards of the regulatory framework**, we will continue to **monitor Royal Mail's performance** on efficiency, quality of service, the financial performance of the universal service network, and competition in parcels and letters. We will also continue to monitor consumers' experiences in the postal sector.
- **Work on the future of postal regulation.** We will begin work, to conclude in 2022, on the future of postal regulation. This work will include revised cost modelling of Royal Mail's operations and a review of Royal Mail's efficiency, along with the findings of the review of user needs. We will also review access and parcels competition and consider whether additional consumer protections are required.

### Continuing to innovate in regulation and data to help consumers and businesses

3.18 The markets that Ofcom regulates are fast-changing and highly innovative, creating new opportunities and challenges for consumers. As such, we need to ensure our work is innovative and future-looking. We will continue undertaking 'horizon scanning' work to proactively anticipate market and technology developments across our sectors. We will also continue to collaborate with stakeholders, other regulators and academic institutions to ensure best outcomes for consumers.

3.19 There will be detailed work in these areas:

- **Energy efficiency.** We believe that the digital industry has an instrumental role to play in reducing the carbon footprint of people and organisations. So we are commencing an initiative to understand how regulation can support and promote energy efficiency. We will carry out this work in collaboration with industry and other regulators.
- **Adopting new approaches to policy-making.** We will continue to explore different ways of delivering policy, including how to do so more rapidly and iteratively; building collaborative and high performing teams; and engaging with a wide variety of people affected by, and interested in, the policies that we deliver.

- **Collaborating externally to develop skills and deliver innovative regulation.** We will develop and test collaboration with external partners to build the skills and knowledge needed to be an effective communications regulator. We will also continue to promote regulatory innovation within Ofcom by working closely with other regulators and stakeholders. We plan to build on our digital wallet<sup>15</sup> prototype due to be delivered in March, working with partners in industry and Government to explore innovative applications, such as supporting Open Communications.
- **Continuing to improve Ofcom's data skills and capabilities.** We will deliver a digital transformation programme to further improve current practice across Ofcom and equip colleagues to understand and respond to changes in the sectors we regulate.
- **Adopting data-driven approaches to policy-making.** We will continue making use of data analytics to monitor policy outcomes and inform our current and future regulation. For example, we will create a blockchain system for phone number management, building on exploratory work using funding from the Regulators' Pioneer Fund.

## Increasing diversity and inclusion

- 3.20 Our work on diversity and inclusion is essential to ensure we can 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 ensure we have a workforce that represents the UK and looks at issues in an inclusive way.
- 3.21 We are delivering our Diversity and Inclusion Programme focusing on achieving three strategic objectives by 2022. We aim to build a diverse workforce to better reflect the UK population; to build a culture within Ofcom which makes diversity and inclusion central to our work practice; and to ensure that the different needs and interests of people are considered when carrying out our regulatory work. We are making progress in these areas, and currently have several internal programmes to promote diversity and inclusion - including colleague development programmes and a focus on inclusive behaviours, wellbeing and mental health.
- 3.22 In the next financial year, we will publish our:
- **Diversity and Inclusion Programme update.** This will set out our priority areas for the following year. Alongside this we will publish our Diversity and Inclusion at Ofcom report, setting out the diversity profile of colleagues for 2019-20. These will be published in Q2. We continue to work towards our current workforce diversity targets, and in 2020, we will establish a new set of targets to 2025.
  - **Equal Pay and Gender and Ethnicity Pay report.** This will explain our gender and ethnicity pay data for the period 2020-21. The report will give an update on the action Ofcom is taking to ensure a rigorous and fair approach to how colleagues are rewarded.

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<sup>15</sup> A digital wallet is an electronic system used by a consumer to make financial transactions

3.23 We also believe that broadcasting benefits consumers when it reflects our rich and diverse society, drawing on the best talent from across our communities. We will continue to report on diversity within TV and radio broadcasting, challenging industry to improve. We expect broadcasters to build on the momentum they have achieved by spearheading schemes to tackle under-representation. In the next financial year, we will publish our:

- **Annual reports on diversity in TV and radio.** 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.
- **Annual report on the BBC.** We will continue to hold the BBC to account on the BBC operating licence diversity obligations. We will report on the BBC’s compliance in our annual report on the BBC in Q3
- **On Demand Programme Services (ODPS) accessibility Code.** Following the introduction of new requirements in relation to accessibility of ODPS, and subject to further consultation on our recommendations as requested by DCMS, we will publish our ODPS accessibility Code.

## Support through Brexit and continued international relationships

3.24 As the UK’s media, telecoms and postal service regulator, Ofcom is independent of Government and we take no view on the means or merits of Brexit.

3.25 The UK Government is leading negotiations with the EU and will agree the legal frameworks that will apply in the UK after Brexit. Throughout the Brexit process, we have provided the Government with independent technical advice in relation to the sectors that we regulate, and will continue to do so. We support the Government’s desire for continued effective regulation, delivered through close collaboration with European and other international partners.

3.26 To ensure that we can continue to learn from, and exchange best practice with other regulators within the EU and beyond, we will continue investing in our bilateral relationships with relevant counterparts around the world. We will also continue participating in the work of bodies such as the European Platform of Regulatory Authorities (EPRA), the Organisation for Economic Cooperation and Development (OECD) and the International Institute for Communications (IIC).

3.27 Our future relationship with EU regulatory networks will be subject to negotiation between the Government and the EU, and other bodies. We will continue to provide independent technical advice to the Government on this and other aspects of our future relationship with the EU and beyond which relate to our sectors. We will also continue to:

- engage with and support consumer and industry stakeholders through Brexit,
- work to ensure that we are prepared for a range of potential outcomes after the end of the transition period.

## 4. Ongoing work to achieve our goals and fulfil our duties

- 4.1 In Section 3 we have highlighted our priorities for 2020/21. Our broader programme of ongoing work, summarised by theme in this section, plays an equally important role in achieving our duties and goals and underpins the regulation of our sectors.
- 4.2 Much of Ofcom's ongoing work programme is non-discretionary and set in legislation. This includes monitoring the BBC, enforcing programme standards and monitoring the radio spectrum for interference. Alongside this, we carry out discretionary work to ensure that we are well placed to help make communications work for everyone.

### Maintaining effective communications networks

- 4.3 Ensuring that consumers and businesses have communications networks that work for them is a central part of Ofcom's work. This includes making sure that physical and spectrum infrastructure is effective, resilient and ready for the future as well as maintaining the systems that have supported UK communications in the past.
- **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 2020/21 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 stakeholders 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.
- **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

4.4 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' proposed 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.
- **Ensuring that the voice of the consumer is 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 associated 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 under the "Stop Scams UK2 initiative, which aims to bring together financial services, communications providers and social media organisations, to co-ordinate an industry led response to scams. Depending on industry commitment, this programme of work will officially launch in March 2020.

- **Comparing quality of service.** Ofcom's annual report, Choosing the Best Broadband, Mobile and Landline Provider, -provides comparative metrics on communications providers' quality of service, including complaints handling and customer satisfaction. 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

4.5 Our work to support the broadcasting industry includes Ofcom's licensing work and ensuring compliance with broadcasting standards across multiple platforms. 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.** We will develop plans for the implementation and licensing of small-scale DAB, with the first multiplex licences expected to be advertised by Ofcom in early 2020.
- **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 broadcasters 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 or repeated, 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.

- 4.6 We regulate content on the BBC's TV channels, radio stations, iPlayer and 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.
- 4.7 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.
- 4.8 Audience expectations for standards on broadcast and on-demand services evolve over time. We are planning to carry out research on expectations for standards across different platforms, which will help us to apply proportionate rules that reflect changing viewing behaviours and audience expectations.

### Monitoring the postal market

- 4.9 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 our annual monitoring update on the postal market, to be published at the end of 2020.

### Effective and robust enforcement

- 4.10 Our wider programme of work and the priority areas set out in section 3, are supported by our commitment to fostering a compliance culture amongst 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.
- 4.11 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.
- 4.12 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.

## Deepening and sharing our understanding of communications

4.13 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 consumers and businesses in the markets we regulate. We collect data directly from industry stakeholders 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 this annual update, which also features a version for each of the devolved nations. We plan to publish the main report in Q3.
  - **Media Nations report.** This is our annual report on TV (including PSB 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 study people's understanding of, and attitudes towards, data use. We will also look in detail at children's online behaviour and attitudes in the context of the harms they may encounter, including the relationship between online and offline harms. 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

4.14 Working with the UK Government, devolved Governments, other regulators and other 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, through the European Regulators' Group for Audiovisual Media Services (ERGA), to improve protection 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 and devolved Governments and administrations on availability issues, 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 stakeholders.** We engage with a range of international stakeholders in communications regulation, to learn from their experiences and ensure that emerging policy thinking and any relevant international legislation that applies in the UK meets the needs of our communications sector.
- 4.15 Ofcom will continue to represent the UK, under ministerial direction, in international bodies such as the International Telecommunication Union (ITU) and the European Conference of Postal and Telecommunications Administrations (CEPT).
- 4.16 Ofcom's future relationship with EU regulatory networks will be subject to negotiation between the UK and the EU.
- 4.17 We collaborate internationally to ensure coordination of spectrum use, and to also share experience and drive strategy and direction.
- 4.18 Ofcom will examine how we can help the Government to achieve its net-zero emission target for 2050. We have had work in place to reduce our own carbon footprint since 2007, and we will continue to explore how we can reduce our footprint further, while challenging industry to play its part too. Other work in this area will include: analysing how our industries affect the environment; what actions we and industry can take to tackle these environmental challenges; and collaborating with other organisations, including other regulators, on joint environmental initiatives.

## 5. Delivering good outcomes for consumers across the UK

5.1 Ofcom’s 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. It is important that we articulate the consumer outcomes that we would like to achieve in our programme of work.<sup>16</sup> Doing so also helps us assess how well we have delivered on our objectives, and where more can be done.

### Consumer outcome measures

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

5.3 We will report on our performance against the outcomes in the 2021 Annual Report, and continue to publish a wide range of more detailed consumer outcome measures.<sup>17</sup> We also expect to publish ex-post reviews for a selection of past priority projects every year.

Strategic priorities and work areas	Measures we want to see
<b>Better broadband and mobile – wherever you are (Mobile)</b>	<ul style="list-style-type: none"> <li>• Increases in the proportion of the UK’s geography that receives good quality mobile coverage from all mobile network operators</li> <li>• Significant 5G roll-out and mobile investment needed to deliver the experience consumers expect in the mid to long-term</li> <li>• High levels of customer satisfaction with service</li> </ul>

<sup>16</sup> We are mindful that much of what we would like to achieve is also reliant on a number of external factors.

<sup>17</sup> 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](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](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](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](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](https://www.ofcom.org.uk/_data/assets/pdf_file/0009/112500/dip-statement.pdf)

<p><b>Better broadband and mobile – wherever you are (Fixed)</b></p>	<ul style="list-style-type: none"> <li>• A reduction in the number of homes unable to get 10Mbit/s</li> <li>• Widespread gigabit capable/ full-fibre rollout</li> <li>• Significant investment in gigabit capable and full-fibre networks</li> <li>• Increased number of homes with more than one gigabit capable network available</li> <li>• High levels of customer satisfaction with service</li> </ul>
<p><b>Fairness for Customers</b></p>	<ul style="list-style-type: none"> <li>• High levels of customer satisfaction with value for money</li> <li>• High levels of satisfaction with complaints handling</li> </ul> <p>We will monitor:</p> <ul style="list-style-type: none"> <li>• The proportion of out of contract customers</li> <li>• The proportion of people who have difficulties being able to afford communications services</li> </ul>
<p><b>Supporting UK broadcasting</b></p>	<ul style="list-style-type: none"> <li>• Continued content investment by PSBs including nations and regions investment</li> <li>• High audience perceptions of the quality of TV</li> <li>• High levels of PSB reach and viewing</li> </ul>
<p><b>Ensuring that online communications work for consumers</b></p>	<p>We will monitor:</p> <ul style="list-style-type: none"> <li>• Levels of consumer awareness of online tools and their use to protect consumers from harm online</li> </ul>
<p><b>Continuing to innovate our approach to regulation and data</b></p>	<p>Internally, we will:</p> <ul style="list-style-type: none"> <li>• Aim to understand the impact of existing, emerging and future technologies</li> <li>• Work across the organisation to significantly improve our capability to capture, store, share, analyse and extract insight from data</li> <li>• Explore opportunities for innovation in policy development</li> </ul>
<p><b>Enabling strong, secure networks</b></p>	<p>We will:</p> <ul style="list-style-type: none"> <li>• Identify gaps in standards and best practice and propose fixes</li> <li>• Monitor compliance with Telecoms Security Requirements</li> </ul>
<p><b>Increasing diversity and inclusion</b></p>	<p>Internally, we aim to achieve:</p> <ul style="list-style-type: none"> <li>• 50:50 gender balance</li> <li>• 40% female representation at senior level</li> <li>• 13% of colleagues at a senior level from a minority ethnic background</li> </ul>
<p><b>Sustaining the universal postal service</b></p>	<p>We will monitor:</p> <ul style="list-style-type: none"> <li>• Royal Mail’s financial sustainability</li> <li>• User satisfaction with postal services.</li> </ul>

## Goals across the UK

- 5.4 Ofcom regulates for the whole UK. Our statutory national advisory committees advise Ofcom about the interests and opinions, in relation to communications matters of people living in each of the four nations of the UK. These committees provide advice to Ofcom policy teams and are an important stage in our policy formulation process. The views of audiences across the UK are also presented on Ofcom's Content Board, which has experienced members representing each of the UK nations. There is also a statutory requirement for each of the UK nations to have its own representation on the Communications Consumer Panel, which pays particular attention to the needs of older and disabled people, people in rural areas and those on low incomes.
- 5.5 Ofcom has now also 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 after devolution has been restored.
- a) The MoU between the UK Government, Scottish Government, Scottish Parliament and Ofcom commits Ofcom to consulting on its draft Plan of Work; and sets out the process for Scottish Ministers to appoint a member to the Ofcom Board among other things.
  - b) The MoU between the UK Government, Welsh Government, and National Assembly for Wales commits Ofcom to consulting on its draft Plan of Work; and sets out the process for Welsh Ministers to appoint a member to the Ofcom Board among other things.
- 5.6 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 when the devolved Government is restored. In the meantime, Bob Downes is acting 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.

## Common challenges

- 5.7 Providing fixed broadband, mobile, and postal services that meet the needs of consumers and businesses in rural and remote areas presents particular challenges. These areas fall disproportionately within Northern Ireland, Scotland and Wales, although similar challenges also affect some English regions. National, regional and local broadcasting services should meet the needs, and reflect the diversity, of audiences across all UK regions and nations. We are currently in a period of change that will affect all UK nations, with developments around the future of online regulation and a continuing period of change around the UK's relationship with the EU and beyond.
- 5.8 In 2020/21, as outlined earlier in this document, we will:
- Publish our Connected Nations report, and updates, on broadband and mobile coverage and speeds, including variations between rural and urban consumers and in different areas of the UK. We will make this information available to consumers to help them make informed choices.

- Focus on improved mobile coverage, particularly in rural areas, as a result of the recent commitment by the four main operators to increase good quality outdoor 4G coverage to 92% of the UK landmass, and to improve outdoor 4G mobile coverage in each of the UK Nations.
- Implement the universal broadband service. We will also work with the devolved Governments in Scotland, Wales and Northern Ireland to ensure smooth interaction with publicly funded devolved broadband schemes, such the “Reaching 100% programme”, Superfast Cymru successor scheme and Project Stratum.
- Publish a consultation on our proposals as part of *Small Screen: Big Debate*, our fourth review of public service broadcasting, taking into account the different PSB landscapes in each of the nations.
- Publish Ofcom’s annual reports on media (Media Nations) and on the BBC, including assessing its performance against its Operating Licence. Each of these reports addresses issues about delivery to each of the UK’s nations.
- Continue to monitor and engage with stakeholders on parcel surcharging in Northern Ireland, the Highlands and Islands of Scotland, and other parts of the UK.
- Promote diversity and equality of opportunity in broadcasting by publishing reports on the TV and radio industries and monitor broadcasters’ progress towards 2020 targets on equality of opportunity, diversity and inclusion in employment.
- Play an active role in the debate on the future of online regulation and provide advice to policymakers. We will publish the second Online Nation report outlining trends in the online sector and assessing how people are served by online content and applications.

## Scotland

- 5.9 **Scottish Government.** In line with our MoU obligations, we will continue to work closely with the Scottish Government, Committees and Members of the Scottish Parliament as well as the Office of the Secretary of State for Scotland in delivering on our 2020/21 work programme.
- 5.10 **Technical advice.** Ofcom wants to see universal coverage of communications services to ensure that people across all parts of the UK can benefit from decent connectivity wherever they live, work and travel. We will therefore continue to provide technical and regulatory advice, as well as relevant data, to assist the Scottish Government in delivering its telecommunications infrastructure projects - such as the ‘Reaching 100% Programme’ and the 4G mobile infill programme.
- 5.11 **Working with stakeholders.** We will also support our wider stakeholder network in Scotland, maintaining productive working relationships with industry, Government and parliamentary stakeholders in Scotland. As part of this, we will continue to develop our policy and operations hub in Edinburgh to help ensure that we can effectively consult with stakeholders, including industry, and to represent people’s interests on a range of issues.
- 5.12 **Assessing the BBC.** As part of our responsibilities around regulating the BBC, we will assess the BBC’s performance in delivering for viewers in Scotland following the first full year of

broadcast for BBC Scotland, including assessing its compliance with conditions in the BBC's Operating Licence. We will also continue to deliver our statutory duties in relation to MG ALBA and plan to license new small-scale digital radio services in Scotland.

## Wales

- 5.13 **Welsh Government.** In line with our MoU obligations, we will continue to work closely with the Welsh Government, Committees and Members of the Welsh Parliament as well as the Office of the Secretary of State for Wales, in delivering on our 2020/21 work programme.
- 5.14 **Public service broadcasting.** We will work with public service broadcasters in Wales to ensure the long-term sustainability of PSB in both Welsh and English and that public service content remains easy to find as more viewers watch TV online. We will also ensure that people in Wales are given every opportunity to engage fully in Small Screen: Big Debate, our fourth review of public service broadcasting.
- 5.15 **Better broadband and mobile.** We will continue to work closely with the Welsh Government to assist with the process of bringing superfast services to those premises in Wales without access. In addition, we will also assist its aim of improving mobile voice and data connections. We will also provide advice to citizen and business organisations throughout Wales who are working to improve coverage and, where appropriate, share information.
- 5.16 **5G innovation.** We will encourage interested parties to explore innovative ways to use 5G and emerging technologies such as LoRaWan<sup>18</sup> in the agricultural sector and rural communities.
- 5.17 **Welsh language.** We will work with the Welsh Language Commissioner to promote the Welsh language in a purposeful manner, focussing our efforts on those areas that will provide consumers with most opportunity to use the language and have most impact.
- 5.18 **Local radio.** We will monitor the development and roll-out of small-scale DAB services and help to ensure that smaller commercial and community radio stations can take full advantage of this new technology.

## Northern Ireland

- 5.19 **Northern Ireland Executive.** We will offer regulatory and technical advice to Northern Ireland Government departments and local councils to support full fibre broadband rollout through publicly funded programmes, and work with industry to encourage further commercial full fibre rollout.
- 5.20 **5G mobile.** We will engage with mobile companies and local authorities to ensure that Northern Ireland benefits fully from the delivery of 5G services.

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<sup>18</sup> LoRaWan refers to low power wide area network technology

- 5.21 **Ireland co-ordination.** 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 preserve cross-border communications services.

## England

- 5.22 **Local communities.** We aim to ensure that our policy making considers all communities within England. Some issues will continue to be important, from mobile coverage and the broadband universal service obligation to the diversity of broadcasters on screen and off screen. We will continue to work with the Government, local MPs and local authorities, as well as participating in groups such as the Local Full-fibre Investment Board.

## 6. Ensuring value for money

### We will continue to deliver efficiencies and savings

- 6.1 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.. We aim to be an efficient and effective regulator for a fast-paced communications sector.
- 6.2 Over this period, on a like-for-like basis, our budget has remained flat in cash terms (£115.7m), only adjusted for additional duties relating to the universal broadband service, cybersecurity and the BBC. This represents a 7% reduction in real terms. Ofcom continues to deliver like-for-like real-terms budget reductions and will continue to increase efficiency wherever we can.

### Spending cap for 2020/21

- 6.3 The UK Government sets a spending cap for Ofcom's budget. For 2020/21 we are proposing a spending cap of £133.6m. This includes a 2% rise to account for inflation, capacity for our responsibilities regulating the BBC; work on the broadband universal service obligation; and cybersecurity. In addition to this we have requested a cap increase to set up the new regulatory regime for Video Sharing Platforms and a cap increase for work related to Telecoms Security Requirements. We will confirm our budget in the final version of the Plan of Work.
- 6.4 Our costs are allocated to stakeholder sectors and the split will be published in our Tariff Tables alongside the final Plan of Work. The work plan is reflected in the tariffs we set, and there is no change to the method we have used to calculate these charges.

### How we will manage our resources in 2020/21

- 6.5 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.
- 6.6 Our resource and skills are aimed at delivering our plans and duties through strategic planning and an integrated approach to our budgets and forecasts. We regularly review priorities, capacity and demand to ensure we can meet our objectives. We also continue to maximise savings by using competitive processes to achieve the best price and quality of service from our suppliers. Where there is a need for investment, we will continue to apply tight financial control to maximise the efficiency and effectiveness of the resources we have.
- 6.7 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.

## A1. What we do

- A1.1 Ofcom's purpose is to make communications work for everyone. We regulate fixed-line and mobile telecoms, TV, radio, video-on-demand services, post, and the airwaves used by wireless devices. We help UK businesses and individuals get the best from communications services and protect them from harmful treatment and practices. Where appropriate, we support competition as the basis for delivering good consumer outcomes.
- 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.<sup>19</sup> 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.

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<sup>19</sup> 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. Project Work for 2020/21

A2.1 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><b>Broadband Universal Service Obligation (USO).</b> We will implement the broadband universal service obligation. Ofcom has designated two Universal Service Providers (USP) to deliver the service; established the obligations that USPs must meet to deliver the scheme in accordance with the legislation; and have made proposals to determine how the costs incurred by a USP may be compensated. Consumers will be able to start requesting the service from 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><b>Wholesale Fixed Telecoms Market Review.</b> We will publish 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, ultra-fast network coverage and enable the smooth replacement of the legacy copper network with fibre services. Any remedies will come into effect from April 2021.</p>	<p>Statement Q4 2020/21</p>
<p><b>Wholesale Calls &amp; Interconnection.</b> We will undertake the next round of market reviews for fixed, mobile and 070 call termination, fixed call origination and review end-to-end obligations. 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 VoIP (voice over internet protocol) including arrangements for Interconnection. We will consult on formal proposals in Q1 2020/21. Any changes to regulation are likely to come into effect from April 2021.</p>	<p>Consultation Q1 2020/21</p> <p>Statement Q4 2020/21</p>
<p><b>Telecoms Regulation in the Hull Area.</b> We will consult on our proposals for fixed telecoms services in the Hull Area in Q4 2019/20, and intend to publish our final Statement in Q4 2020/21. This will cover all</p>	<p>Statement Q4 2020/21</p>

wholesale voice/broadband and leased-line markets. Any remedies will come into effect from April 2021.	
<b>Award spectrum bands as they are cleared and released.</b> We will award spectrum bands as they are cleared and released. We will consider responses to our proposals for the award of the 700 MHz and 3.6-3.8 GHz spectrum bands. We will conclude with a decision on how to proceed with the award and set this out in a Statement, with a view to completing the award in early Summer 2020.	Auction Q1 2020/21
<b>700 MHz Programme.</b> 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 broadcasters incur as a result of the infrastructure changes associated with 700 MHz clearance. Our plan is to make the 700 MHz band available for mobile services by May 2020.	Jan 20 - Update on 700 MHz CP Apr 20 - Final update on 700 MHz CP
<b>Enabling additional spectrum for mobile including 5G services.</b> 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 continue our work to understand future spectrum demand.	Consultation Q1 2020/21
<b>Improve mobile coverage.</b> We will continue to support the Government and the mobile operators in the delivery of the Shared Rural Network proposal, and once binding licence obligations are in place we will 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 un-necessary 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 also as explore innovative technology solutions to improve mobile coverage in rural areas.	Consultation (mobile phone repeaters) Q3 2020/21
<b>Spectrum sharing:</b> 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

<b>Mobile broadband performance measurement.</b> 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.	Report Q3 2020/21
<b>Spectrum management strategy.</b> We will review and update our spectrum management strategy and to set out a plan for implementing changes.	Statement Exemption above 100 GHz Q1 2020/21  Statement Spectrum Strategy Q3 2020/21
<b>Future regulatory financial reporting.</b> 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

## Fairness for customers

Project Details	Milestones
<b>Fairness for Customers Commitments.</b> We will continue to monitor companies' performance against these commitments. We will also publish a progress report next year, reviewing whether companies are delivering what they have promised. This is alongside our regular reporting on customer complaints and satisfaction.	Report Q3 2020/21
<b>Broadband differential pricing practices.</b> 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.	Final conclusions Q4 2019/20
<b>Social tariffs.</b> We will continue to review the affordability of broadband and examine the case for the introduction of social tariffs. As part of this work, we will work with Government to consider how such a tariff might be implemented, including any appropriate legislative changes.	Publication Q1 2020/21
<b>Collective switching.</b> We will consider the case for requiring providers to take part in a collective switching trial designed to help the least engaged customers, including vulnerable customers.	Ongoing

<p><b>Consumer information on gigabit-capable / ultrafast broadband.</b> To ensure that people and businesses have the right information to make informed decisions about the broadband services best for them, we are considering whether they would benefit from more information about the characteristics and capabilities of gigabit-capable / ultrafast fixed and mobile broadband technologies and how it should be communicated.</p>	Ongoing
<p><b>Monitoring the impact of end-of-contract and annual best tariff notifications.</b> From February 2020, broadband, mobile, landline and pay-TV companies will be 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 are implementing these notifications, and their impact on customer behaviour.</p>	Ongoing
<p><b>Participation and vulnerability.</b> 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>	Ongoing
<p><b>Open Communications.</b> 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>	Consultation on Open Communications Q1 2020/21
<p><b>Personalised pricing.</b> We will publish a discussion document on personalised pricing, including the use of data and algorithms that support these practices.</p>	Discussion document Q1 2020/21
<p><b>Price Accreditation Scheme.</b> We will conclude our review of our accreditation scheme for price comparison websites to ensure it continues to work for consumers in the modern market, and to ensure alignment with the objectives of the European Electronic Communications Code.</p>	Statement Q1 2020/21

<p><b>Reporting on pricing trends.</b> 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 Q3 2020/21</p>
<p><b>Review of the General Conditions and Universal Service Conditions to implement the European Electronic Communications Code.</b> 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 December 2021.</p>	<p>EECC Statement Q1 2020/21</p> <p>Switching process consultation Q1 2020/21</p> <p>Switching process statement Q2 2020/21</p> <p>Consultation on legacy USO services Q4 2020/21</p>
<p><b>Improving consumer information on fixed and mobile coverage and performance.</b> 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 enhance the functionality of these consumer facing tools to ensure they remain relevant and accessible. We will continue to review the meaningfulness to consumers of the information we make available and will take action to improve our metrics when needed.</p>	<p>Ongoing</p>
<p><b>Migration to voice-over-IP services:</b> We will work with communications providers to help ensure that 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><b>Fairer mobile handset pricing.</b> 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 proposals to apply a 24-month limit to handset contracts that are sold with a link to a mobile airtime contract (known as ‘linked split contracts’). We will continue our work on this and conclude on our proposals as part of the Review</p>	<p>Statement Q1 2020/21</p>

of the General Conditions and Universal Service Conditions to implement the European Electronic Communications Code.	
<b>Standalone landline services.</b> BT implemented price reductions for its customers buying landline services in a standalone contract in April 2018. Its commitments expire in March 2021 and we will consider what appropriate protections are necessary going forward to ensure that these customers receive value for money for the landline services they buy.	Document to be published Q3 2020/21
<b>Charges on non-geographic numbers.</b> We will start a review of the pricing of access charges for non-geographic calls (including the 084, 087, 09 and 118 numbers) to assess whether these charges raise any customer fairness concerns and explore options to ensure consumers are appropriately protected from potential bill shock. We will carry out this review alongside our ongoing Future of Numbering Policy Review.	Consultation Q3 2020/21
<b>Future of Numbering policy review.</b> We will continue our strategic review of the telephone numbering plan to ensure that 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.	Ongoing

## Supporting UK broadcasting

Project Details	Milestones
<b>PSB Programme: Small Screen: Big Debate.</b> We will consider the role of public service broadcasting in a fast-changing media landscape by facilitating the 'Small Screen: Big Debate' with industry, Government, Parliament, viewers and listeners.	Consultation H1 2020/21
<b>Ofcom's annual report on the BBC.</b> 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.	Report Q3 2020/21
<b>Material changes to BBC public service activities.</b> We will continue to monitor the BBC public service activities to ensure any material changes have appropriate regulatory scrutiny if required.	Ongoing

<p><b>Monitoring the BBC’s commercial activities.</b> 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.</p>	Ongoing
<p><b>BBC Studios review.</b> We have launched a review of the evolution of BBC Studios, including how it has implemented our Trading and Separation requirements. We will engage with stakeholders on our findings through the course of the year.</p>	Report Late 2020
<p><b>Responding to Channel 4 Corporation’s annual Statement of Media Policy.</b> We will publish our response to Channel 4 Corporation’s delivery of its media content duties and plans for the following year as set out in its statement.</p>	Report Q1 2020/21
<p><b>Reporting on adults’ media literacy.</b> 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>	Report Q1 2020/21
<p><b>Reporting on children’s media literacy.</b> 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 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>	Report Q4 2020/21
<p><b>Analogue community radio.</b> We will undertake the necessary spectrum planning to maximise access for community radio and support the fourth round of licensing for analogue community radio.</p>	Ongoing

<p><b>Small-scale DAB.</b> We will develop plans for the implementation and licensing of small-scale DAB, with the first multiplex licences expected to be advertised by Ofcom in early 2020.</p>	Ongoing
<p><b>Advertising policy and regulation.</b> 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 were introduced, Ofcom and its co-regulators (BCAP and the ASA) would be required to administer this.</p>	Subject to Government consultation/statement

## Ensuring that online communications work for consumers and businesses

Project Details	Milestones
<p><b>Harmful content and conduct.</b> We will continue engagement with Government and stakeholders in industry, academia and the third sector around plans for the regulation of online harms</p>	Ongoing
<p><b>Making sense of media.</b> We will continue our work to help improve the online skills, knowledge and understanding of UK adults and children through providing robust research and collaboration with/coordination of relevant stakeholders and their activities.</p>	External MSOM event Q2 2020/21
<p><b>Video-sharing platform regulation.</b> The new Audiovisual Media Services Directive (AVMSD) introduces requirements for video-sharing platforms (VSPs) to protect children from potentially harmful content and to protect the general public from content containing illegal material and incitement to violence or hatred. Government has proposed for Ofcom to act as an interim regulator for VSPs until a future online harms regulator is appointed and we will outline milestones upon confirmation of this.</p>	AVMSD transposition Q2 2020/21
<p><b>Number-Independent Interpersonal Communications Services (NIICS).</b> We will carry out and publish research to understand the services that compose the NIICS market, as well as consumers' experience of these, in the context of new provisions under the EECC due to come into force in December 2020.</p>	Research findings Q1 2020/21

## Enabling strong, secure networks

Project Details	Milestones
<p><b>Building cyber security capability; continuing to ensure communications providers and operators of essential services are managing security risks.</b></p> <p>We will continue to engage with communications providers to carry out the TBEST scheme (a threat intelligence-led penetration testing scheme). We will work with industry to identify gaps in standards and best practice and lead on initiatives to close the gap.</p>	Ongoing
<p><b>Network Security &amp; Resilience Programme.</b> We will provide strategic and operational support for network security and resilience and emergency access.</p>	Ongoing

## Sustaining the universal postal service

Project Details	Milestones
<p><b>Review of User Needs.</b> We will examine research on user needs and assess whether the postal services market is meeting the reasonable needs of postal users.</p>	Report in 2020
<p><b>Review of the future regulatory framework for post.</b> 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 all 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 consumers and businesses

Project Details	Milestones
<p><b>Data Innovation Hub.</b> We will build a central team to contribute to data science initiatives and support colleagues around the organisation interested in maximising insight and efficiency from data related activities. This will improve our tools and processes to support policy development.</p>	Ongoing

<p><b>Testing a new approach to improve UK telephone number management and improving trust in telephone numbers.</b> Number portability enables consumers to change service provider while keeping their existing number, fostering choice and effective competition without cost or inconvenience. Following successful 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 proposals for a strategic solution to number portability, to address inefficient call routing and the level of failures in business porting.</p>	<p>Consultation Q1 2020/21</p>
<p><b>Salisbury copper retirement trial.</b> 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>	<p>Ongoing</p>
<p><b>Emergency Call Handling Performance.</b> We will review and propose improved capabilities for emergency call handling, so that consumers and citizens have confidence in being able to contact the emergency services in an emergency.</p>	<p>Ongoing</p>
<p><b>Innovation in regulatory approaches.</b> We will coordinate Ofcom's innovative work, and identify new opportunities to innovate in our regulatory approaches.</p>	<p>Ongoing</p>

## Increasing diversity and inclusion

Project Details	Milestones
<p><b>Diversity and Inclusion Report.</b> We published our first progress report on our four-year Diversity and Inclusion Programme in July 2019. Our diversity and inclusion programme covering the period 2018-2022 outlines our Action Plan, including a detailed account of our objectives and programme of work, both as an employer and as the UK's communications regulator. We will publish our annual diversity report. The report helps us determine our strategic diversity and inclusion priorities and objectives for the coming year. It looks at the diversity profile of colleagues at Ofcom overall and in areas such as recruitment, performance and promotions. We will also confirm new 5 year diversity targets for Ofcom, as the current targets which were set in 2015 expire at the end of 2020.</p>	<p>Report Q2 2020/21</p>

<p><b>Equal Pay and Gender-ethnicity Pay.</b> 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><b>Monitoring diversity and equality of opportunity in broadcasting.</b> 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 Q2 2020/21</p>
<p><b>On Demand Programme Services (ODPS) accessibility Code.</b> Following the introduction of new requirements in relation to accessibility of ODPS, we will publish our ODPS accessibility Code.</p>	<p>Anticipated Q2 2020/21</p>

## Support through Brexit and continued international relationships

Project Details	Milestones
<p><b>Implementation of relevant European legislation.</b> Where appropriate and necessary, 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 the needs of consumers and citizens now and in the future.</p>	<p>Ongoing</p>
<p><b>Strategic implications of the changing nature of our relationship with the EU.</b> Ofcom takes no views on the means or merits of Brexit. We will provide advice to 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 our stakeholders to understand their positions and priorities.</p>	<p>Ongoing</p>

## A3. Responding to this consultation

### How to respond

- A3.1 Ofcom would like to receive views and comments on the issues raised in this document, by 5pm on 25 February 2020.
- A3.2 You can download a response form from <https://www.ofcom.org.uk/consultations-and-statements/category-2/plan-of-work-2020-21>. You can return this by email or post to the address provided in the response form.
- A3.3 If your response is a large file, or has supporting charts, tables or other data, please email it to [annualplan2020@ofcom.org.uk](mailto:annualplan2020@ofcom.org.uk), as an attachment in Microsoft Word format, together with the cover sheet (<https://www.ofcom.org.uk/consultations-and-statements/consultation-response-coversheet>). This email address is for this consultation only, and will not be valid after April 2020.
- A3.4 Responses may alternatively be posted to the address below, marked with the title of the consultation:  
Plan of Work Team, Strategy and Policy Team  
Ofcom  
Riverside House  
2A Southwark Bridge Road  
London SE1 9HA
- A3.5 We welcome responses in formats other than print, for example an audio recording or a British Sign Language video. To respond in BSL:
- Send us a recording of you signing your response. This should be no longer than 5 minutes. Suitable file formats are DVDs, wmv or QuickTime files. Or
  - Upload a video of you signing your response directly to YouTube (or another hosting site) and send us the link.
- A3.6 We will publish a transcript of any audio or video responses we receive (unless your response is confidential)
- A3.7 We do not need a paper copy of your response as well as an electronic version. We will acknowledge receipt if your response is submitted via the online web form, but not otherwise.
- A3.8 It would be helpful if your response could include a reference to the section and paragraph your response refers to. It would also help if you could explain why you hold your views, and what you think the effect of Ofcom's proposals would be.
- A3.9 If you want to discuss the issues and questions raised in this consultation, please contact send an email to [annualplan2020@ofcom.org.uk](mailto:annualplan2020@ofcom.org.uk).

## Confidentiality

- A3.10 Consultations are more effective if we publish the responses before the consultation period closes. In particular, this can help people and organisations with limited resources or familiarity with the issues to respond in a more informed way. So, in the interests of transparency and good regulatory practice, and because we believe it is important that everyone who is interested in an issue can see other respondents' views, we usually publish all responses on our website, [www.ofcom.org.uk](http://www.ofcom.org.uk), as soon as we receive them.
- A3.11 If you think your response should be kept confidential, please specify which part(s) this applies to, and explain why. Please send any confidential sections as a separate annex. If you want your name, address, other contact details or job title to remain confidential, please provide them only in the cover sheet, so that we don't have to edit your response.
- A3.12 If someone asks us to keep part or all of a response confidential, we will treat this request seriously and try to respect it. But sometimes we will need to publish all responses, including those that are marked as confidential, in order to meet legal obligations.
- A3.13 Please also note that copyright and all other intellectual property in responses will be assumed to be licenced to Ofcom to use. Ofcom's intellectual property rights are explained further at <https://www.ofcom.org.uk/about-ofcom/website/terms-of-use>.

## Next steps

- A3.14 Following this consultation period, Ofcom plans to publish a statement in March 2020.
- A3.15 If you wish, you can register to receive mail updates alerting you to new Ofcom publications; for more details please see <https://www.ofcom.org.uk/about-ofcom/latest/email-updates>

## Ofcom's consultation processes

- A3.16 Ofcom aims to make responding to a consultation as easy as possible. For more information, please see our consultation principles in Annex 4.
- A3.17 If you have any comments or suggestions on how we manage our consultations, please email us at [consult@ofcom.org.uk](mailto:consult@ofcom.org.uk). We particularly welcome ideas on how Ofcom could more effectively seek the views of groups or individuals, such as small businesses and residential consumers, who are less likely to give their opinions through a formal consultation.
- A3.18 If you would like to discuss these issues, or Ofcom's consultation processes more generally, please contact the corporation secretary:

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

## A4. Ofcom's consultation principles

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

#### Before the consultation

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

#### During the consultation

- A4.2 We will be clear about whom we are consulting, why, on what questions and for how long.
- A4.3 We will make the consultation document as short and simple as possible, with a summary of no more than two pages. We will try to make it as easy as possible for people to give us a written response. If the consultation is complicated, we may provide a short Plain English / Cymraeg Clir guide, to help smaller organisations or individuals who would not otherwise be able to spare the time to share their views.
- A4.4 We will consult for up to ten weeks, depending on the potential impact of our proposals.
- A4.5 A person within Ofcom will be in charge of making sure we follow our own guidelines and aim to reach the largest possible number of people and organisations who may be interested in the outcome of our decisions. Ofcom's Consultation Champion is the main person to contact if you have views on the way we run our consultations.
- A4.6 If we are not able to follow any of these seven principles, we will explain why.

#### After the consultation

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

## A5. Consultation coversheet

### BASIC DETAILS

Consultation title: Plan of Work 2020/21

To (Ofcom contact):

Name of respondent:

Representing (self or organisation/s):

Address (if not received by email):

### CONFIDENTIALITY

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

Nothing

Name/contact details/job title

Whole response

Organisation

Part of the response

If there is no separate annex, which parts? \_\_\_\_\_

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

### DECLARATION

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

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

Name

Signed (if hard copy)