

Ofcom's Draft Annual Plan 2009/10

14 January 2009

Agenda

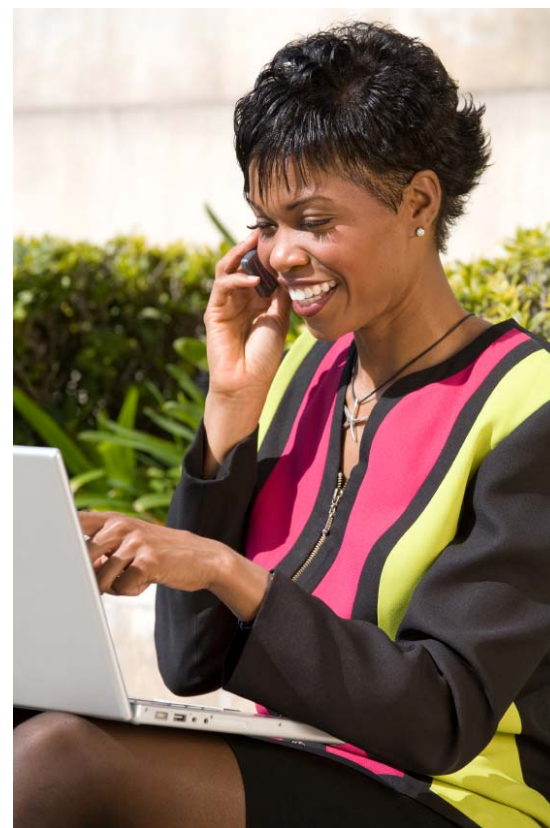
- Welcome Ed Richards
- Ofcom's 2009/10 proposed plan Peter Phillips
- Q&A Ofcom panel



Ofcom's strategic framework and the changing communications sector

The communications sector is facing significant change

- The communications sector is not immune from the challenging economic climate
- Yet innovation is still taking place and convergence is continuing apace
- We are alert to the changing circumstances and will respond quickly to any resulting consumer harm
- Our regulatory principles remain critical to our work programme
- We also intend to support forthcoming government initiatives in the communications sector



Ofcom's current strategic framework: key objectives

**Driving forward a
market-based
approach to
spectrum**

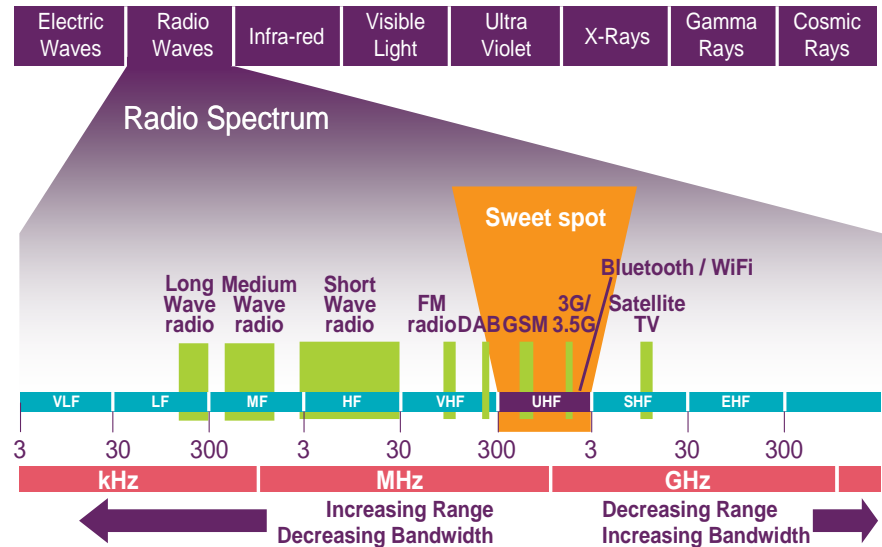
**Delivering
public interest
objectives as
platforms and
services converge**

**Empowering
citizens and
consumers and
improving
regulatory
compliance where
necessary**

**Promoting
competition and
innovation in
converging
markets**

Spectrum is a key resource for existing and new services

- Wireless services continue to grow in popularity
- Innovation opens possibilities for more uses of spectrum
- A market-based approach allows the best use of spectrum
- We aim to release to the market some key spectrum bands in the course of 2009/10

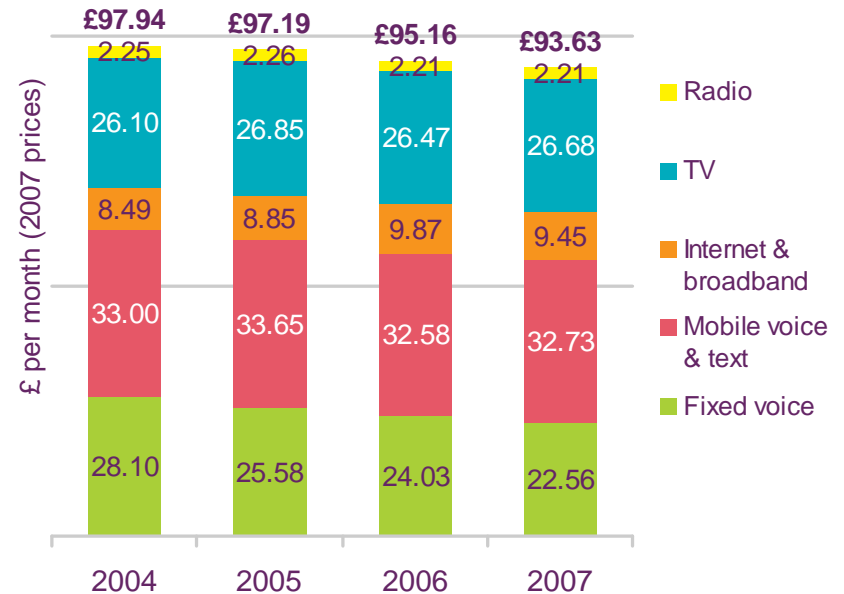


Our liberalisation programme will enable innovative spectrum uses



Competition and innovation deliver consumer benefits

- Competition is driving down prices across the communications sector
- Providers are launching exciting new services while new platforms are increasing consumer choice
- Nevertheless we have to continue regulating traditional bottlenecks...
- ...and to provide a clear, stable environment to encourage investment and innovation



We will continue to promote sustainable competition in all the markets we regulate

Delivering public interest objectives remains crucial

- Convergence poses challenges to traditional models of delivering public interest objectives
- Worsening economic conditions may cause additional pressure
- We are also responding to calls to tackle public interest issues related to online media
- Access and inclusion remain a priority



We aim for sustainable outcomes in the delivery of traditional and new public objectives



Consumer empowerment is as important as ever

- The difficult economic climate may create incentives for taking advantage of uninformed consumers
- Consumer information and media literacy are key to minimising these risks
- Swift and firm enforcement action is important to maintaining consumer confidence
- We also aim to address the remaining barriers to switching



We will be vigilant of new possible sources of consumer and citizens harm



Work programme for 2009/10

Policy priorities

Driving forward a market-based approach to spectrum

Promoting competition and innovation in converging markets

Delivering public interest objectives as platforms and services converge

Empowering citizens and consumers and improving regulatory compliance where necessary

- Releasing spectrum, including the digital dividend

- Promoting competition in fixed telecoms
- Promoting competition in pay TV
- Enabling clear regulation for next generation access and core networks
- Assessing our regulatory approach in mobile

- Promoting access and inclusion
- Preparing for the future of public service broadcasting
- Supporting the evolution of radio

- Promoting media literacy
- Developing and enforcing consumer protection policies

Other major work areas

Driving forward a market-based approach to spectrum

Promoting competition and innovation in converging markets

Delivering public interest objectives as platforms and services converge

Empowering citizens and consumers and improving regulatory compliance where necessary

- Delivering international spectrum goals
- Supporting the development of spectrum trading and liberalisation

- Business Markets

- Supporting the Digital Switchover
- Supporting new approaches for online issues

- Enforcing competition and resolving disputes
- Promoting information and improving switching procedures

Cross-cutting objectives

Simplifying regulation and minimising administrative burdens

Maximising our impact on European and wider international policy development

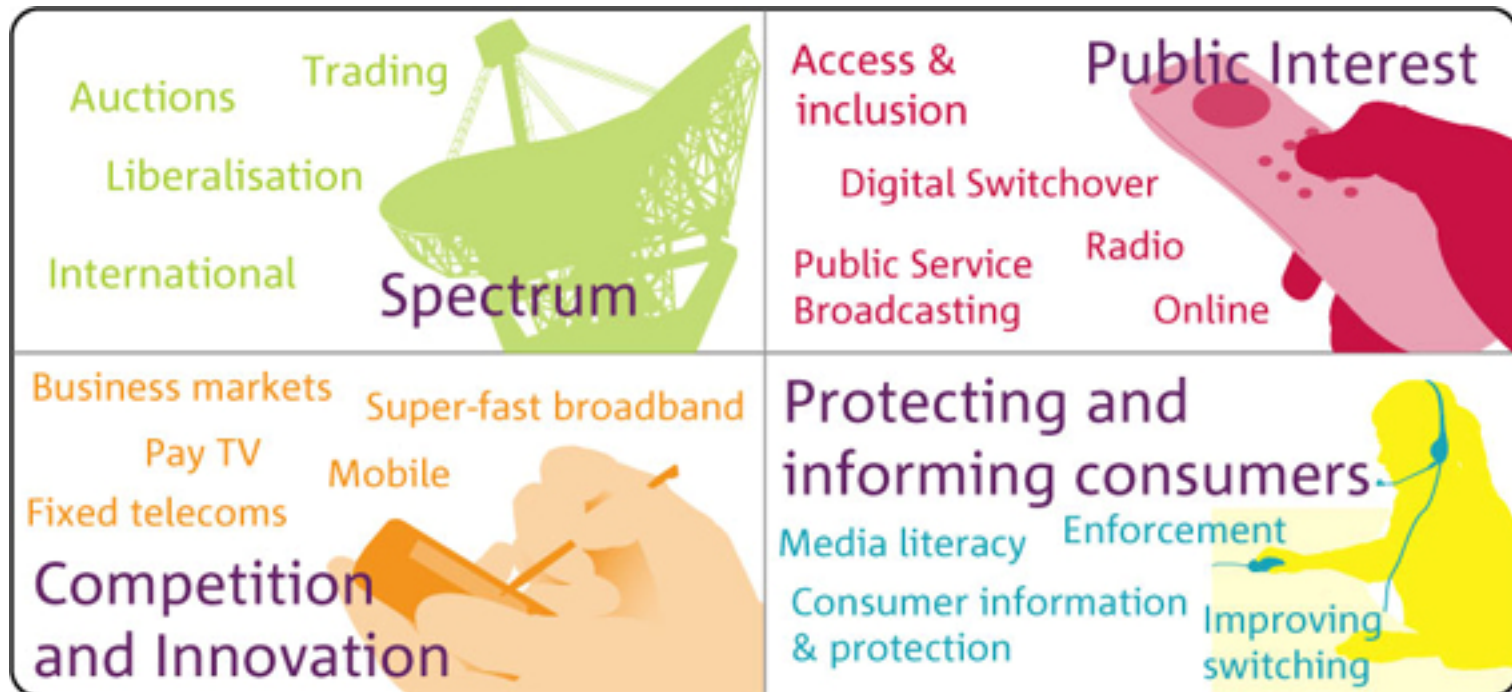
Preparing Ofcom's new strategic framework

We will continue to improve core services for stakeholders

- Keeping spectrum free of interference
- Licensing access to spectrum
- Responding to public enquiries and complaints
- Allocating telephone number ranges
- Providing information services
- Publishing market research and analysis
- Preparation for the London Olympics



Proposed work programme for 2009/10



Next steps

- Public consultation events across the UK
- Consultation closes on 12 February
- Final Plan published at the end of March





Q&A session

Ofcom panel

- Jackie Caspary
Director, Central Operations
- Martin Donnelly
Partner, International Relations
- Stuart McIntosh
Partner, Competition
- Claudio Pollack
Consumer Policy Director
- Stewart Purvis
Partner, Content and Standards
- Philip Rutnam
Partner, Spectrum Policy Group