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COMMUNICATIONS POLICY

Regulatory and institutional structure

Summarise the regulatory framework for the communications sector. Do any foreign ownership restrictions apply to communications services?

Communications law and regulation in the United Kingdom is principally founded on the Communications Act 2003 (CA 2003). This legislation implemented several EU laws aimed at harmonising, simplifying and increasing the usability of telecoms regimes across all EU member states and continues to provide the core statutory framework for the regulation of electronic communications networks and services in the United Kingdom. The Electronic Communications and Wireless Telegraphy (Amendment etc) (EU Exit) Regulations 2019 and the Broadcasting (Amendment) (EU Exit) Regulations 2019 were made on 12 February 2019 and came into force on 31 January 2020, both of which amended certain deficiencies within CA 2003 and addressed implications of Brexit. Additionally, the United Kingdom implemented Directive (EU) 2018/1972 (the European Electronic Communications Code (EECC)) through the Electronic Communications and Wireless Telegraphy (Amendment) (European Electronic Communications Code and EU Exit) Regulations 2020, which were made on 2 December 2020 and came into force on 21 December 2020. The EECC replaced the previous EU authorisation directives, but the authorisation regime remained largely unchanged.

CA 2003 grants authority to the Office of Communications (Ofcom), the UK's national regulatory authority for communications. The role of Ofcom is to set and enforce regulatory rules in all sectors for which it is responsible and, along with the Competition and Markets Authority (CMA), to promote fair competition across the industry by enforcing competition laws. As part of Ofcom's regulatory principles, Ofcom must take the least intrusive approach to intervention and will only do so where the intervention would be evidence-based, proportionate, consistent and transparent.

Although Ofcom is accountable to Parliament, the Department for Science, Innovation and Technology (DSIT) is the UK government department with overall responsibility for developing the telecoms regulatory framework within the United Kingdom. Ofcom is restricted to acting within the powers conferred on it by Parliament.

Ofcom's Plan of Work 2026/27 outlines four main priorities for the coming year, and how the delivery of such priorities will be supported by various projects and programmes that Ofcom will run during the course of 2026-27. These four areas are:

- "Internet and post we can rely on": including promoting seamless, reliable mobile connectivity and investment and competition in gigabit-capable fixed broadband networks, along with appropriate security and resilience measures to protect such demand. A particular note was given to the implementation of the Telecoms Access Review 2026 (TAR 2026), including monitoring Openreach's compliance with TAR 2026's rules and requirements. Ofcom will also continue its work on consumer protection and affordability (eg, around in-contract price rises, the treatment of vulnerable customers and tackling scam calls and texts), and on managing the migration from legacy services such as public switched telephone network and 2G and 3G. Understanding consumer impact of AI in telecoms is also an ongoing programme, and in January 2026, Ofcom published an invitation to contribute on the

impact AI could have on the experience of residential and business broadband, mobile and pay TV customers.

- "Media we trust and value": including ensuring continued access to broadcast and on-demand media, along with appropriate protections against harmful content being presented on such platforms. A particular note was given to ensuring access to trusted, duly accurate and duly impartial broadcast news.
- "We live a safer life online": including ensuring compliance with the Online Safety Act 2023 (OSA), publishing the register of "categorised services" under the OSA and consulting on applicable additional duties. A particular note was given to ensuring that, within this framework, children are appropriately protected online including through highly effective age-assurance, stronger protections against child sexual abuse material and grooming, and safeguards around personalised feeds and recommender systems. Ofcom will also roll out additional safety measures to strengthen its illegal harms and children's protection codes, implement transparency reporting and fees regimes for in-scope online services, and use enforcement (from informal engagement to formal investigations) to drive compliance, with a particular focus on protecting children and improving online safety for women and girls.
- "Enabling wireless in the UK economy": including ensuring that radio spectrum remains an enabler for wireless services in the United Kingdom, and examining international engagement not only in the commercial market, but also in the public sector (for emergency services, armed forces, etc). A particular note was given as to how this will involve meeting greater demand in the market, and that Ofcom will explore whether spectrum sharing could improve connectivity where it is hard to provide, for example, in some rural locations.

The Ofcom Plan of Work broadly aligns with the UK government's Statement of Strategic Priorities for Online Safety, designated on 2 July 2025, which outlines the following priorities: safety by design; transparency and accountability; agile regulation; inclusivity and resilience; and technology and innovation.

The Ofcom Plan of Work additionally aligns with the UK government's Draft Statement of Strategic Priorities for telecommunications, the management of radio spectrum, and postal services, laid before Parliament on 11 February 2026. This outlines the priorities of: world-class digital infrastructure; furthering the interests of telecoms consumers; maximising access to spectrum; secure and resilient telecoms infrastructure; and resilient and sustainable postal services.

What we see then, are overlapping themes of safety in content, resilience of infrastructure and the applicability of agile regulation in order to encourage an active and competitive market.

The UK government implemented a ban on the purchase of Huawei 5G equipment by UK operators (after 31 December 2020) and a requirement that all Huawei equipment be removed from 5G networks (by the end of 2027) through the Telecommunications (Security) Act 2021 (TSA 2021), which came into effect on 1 October 2022. TSA 2021 replaced sections of CA 2003 and provides for a duty to take security measures, allowing for the UK government to prohibit or restrict communications providers from using goods, services or facilities on national security grounds. There are also duties on the provider to inform users of a security compromise.

The implementation of the powers under TSA 2021 involved the UK government marking Huawei with a "Designation Notice" on 13 October 2022, and simultaneously releasing an accompanying "Designated Vendor Direction", that was both published online and directly sent to 35 public communications providers. This contained a series of 12 specific requirements around the use of the goods and services of the "Designated" Huawei group.

Ofcom published a follow-up statement on 12 December 2022, which outlined the procedures it expects to follow in carrying out its monitoring and enforcement activities under CA 2003, as amended by TSA 2021. The statement contains general guidance about which security compromises providers would be expected to report to Ofcom and how to do so. Further to this, the UK government published the "Monitoring direction" that it had issued to Ofcom on 31 October 2023, which outlined the specific role and duties that had been assigned to Ofcom in order to enforce the Huawei "Designated Enforcement Direction" under TSA 2021. In particular, this noted how certain public communications providers had been designated as "Relevant Service Providers", and that Ofcom was now responsible for obtaining regular reporting information from said providers in order to ensure ongoing compliance with the Designated Vendor Direction.

The National Security and Investment Act 2021 (NSIA 2021), which came into effect on 4 January 2022, reformed the UK government's ability to scrutinise foreign investment in, among other things, the communications and data infrastructure sectors. If an acquisition of a company falls within communication or data infrastructure (two of the 17 sectors called out in the NSIA 2021 (Notifiable Acquisition) (Specification of Qualifying Entities) Regulations 2021 (NARs)), the NSIA 2021 may apply, granting the Cabinet Office (acting through the Investment Security Unit) powers to scrutinise and review the transaction if one of the "mandatory filing" trigger events occurs where a threshold of 25%, 50% or 75% of votes or shares in a qualifying entity is hit or passed through, or where there is an acquisition of voting shares that prevents the passage of a resolution governing the affairs of the qualifying entity. A voluntary NSIA 2021 filing is also potentially required where material influence is acquired over a qualifying entity, or control acquired of a qualifying asset. A telecoms service provider could fall within the definition of a qualifying entity if it is carrying on activities in the United Kingdom or supplying goods and services to the United Kingdom. If NSIA 2021 applies, companies must either make a mandatory notification or can make a voluntary notification to the Investment Security Unit. The Secretary of State will review the transaction and can either approve, approve with conditions or prohibit the entities from completing the acquisition.

On 21 May 2024, the UK government published updated guidance and resources related to NSIA 2021, including a new "section 3 statement'"on the exercise of the call-in power and guidance on compliance and enforcement. Key updates include:

- section 3 statement: an updated statement outlined when the Secretary of State is likely to exercise the power to call in acquisitions for scrutiny, detailing the factors considered to protect national security;
- guidance on compliance and enforcement: new guidance provided information on compliance with NSIA, including notices, orders, offences and enforcement actions, emphasising the importance of adherence to the Act;
- NARs: the first statutory review of the NARs was completed, with findings published to refine the system;

- call for evidence response: the government responded to a call for evidence, outlining future work to enhance the effectiveness of NSIA;
- market guidance: additional information was provided on the application of NSIA to the higher education sector and other topics, ensuring clarity for stakeholders; and
- outward direct investment: guidance noted that NSIA may apply to outward direct investment by UK investors, expanding the scope of scrutiny.

On 22 July 2025, the UK government launched a consultation providing stakeholders with the opportunity to share their views on its proposed updates to the NARs. As detailed in the Consultation response published on 12 March 2026, respondents largely supported the proposed changes, which sought to reduce scope where possible, increase scope where necessary and improve clarity for businesses. No changes were proposed to the Communications sector. The Data Infrastructure sector will be amended to include third-party operated data centres alongside certain Cloud Service Providers and Managed Service Providers, and to remove public sector authorities from its scope. Secondary legislation to enact these changes will be laid before Parliament later in 2026.

Law stated - 30 April 2026

Authorisation/licensing regime

Describe the authorisation or licensing regime.

The general authorisation regime under CA 2003 makes no distinction between fixed, mobile and satellite networks and services. All electronic communications networks (ECNs), electronic communication services (ECSs) and associated facilities (AFs) fall under the scope of CA 2003, irrespective of the means of transmission. Moreover, under the general authorisation regime, there is no requirement for specific licensing of ECNs, ECSs and AFs, provided they comply with Ofcom's General Conditions.

The broad definition of ECNs to include any transmission system for the conveyance of signals between a transmitter, a medium and a receiver, by use of electrical, magnetic or electromagnetic energy, is in line with the EU's overarching principle of technology neutrality. Equally widely defined, an ECS is a service whose principal feature is the conveyance of signals through an ECN, excluding content services (the provision of material such as information or entertainment). Under CA 2003, an AF is a facility, element or service that is, or may be, used to enable the provision of an ECN or ECS or other services on that network or service, or supports the provision of such services.

ECNs or ECSs can provide networks or services to the public without the need for prior authorisation from Ofcom where they have complied with the General Conditions of Entitlement (the General Conditions). ECNs or ECSs may, however, need a licence in relation to the particular network or service that they are operating.

The General Conditions continue to receive regular updates from Ofcom, and a copy of the most recent unofficial consolidated version can be found on its website, along with a log of changes and accompanying statements that explain any historical amendments. The most recent edition of the unofficial consolidated version of the General Conditions was published on 22 April 2025, which reflects recent changes to General Condition B.1 in order to implement bans on "Global Title" leasing arrangements, or the use of "Global Titles" that

have already been created from sub-allocated numbers, that were coming into force that day, with phased commencement dates, providing for later application to existing arrangements.

There are currently 17 General Conditions in force, the majority of which must be complied with by all ECNs and ECSs. The remainder apply in more limited circumstances, such as for public pay telephones. Under CA 2003, Ofcom has the power to amend or revoke any of the General Conditions as appropriate. For example, in the update on 1 February 2025, Ofcom removed references to the Phone-Paid Services Authority and modified the language of Conditions C2.11 and C2.12, along with the overarching definitions, to reflect the fact that Ofcom has taken over the regulation of premium-rate phone services in accordance with the Regulation of Premium Rate Services Order 2024.

In the smaller number of cases where an ECN or ECS is subject to specific conditions, Ofcom will notify that provider of the fact that those conditions are to be imposed. The General Conditions apply to ECNs by reference to the provision of the network, rather than ownership of the underlying network assets making up the ECN. The ECS will generally be the entity with a direct contractual relationship with the end user, or the reseller or other intermediary in the case of a wholesale provider. Ofcom provides further guidelines on which organisations will fall within these categories.

ECSs expressly include internet access services, interpersonal communications services (differentiated into number-based or number-independent) and services consisting wholly or mainly in the conveyance of signals. Number-independent interpersonal communications are subject to a more limited subset of regulatory obligations and are generally outside the scope of the General Conditions as they "do not benefit from the use of public numbering resources and do not participate in a publicly assured interoperable ecosystem".

Entities using radio spectrum, such as mobile network operators or satellite service providers, will require the grant of a licence from Ofcom under the Wireless Telegraphy Act 2006 (WTA 2006). Each grant will detail the specific frequency, use, fees and duration of the licence. Some services, such as receive-only earth stations, may not fall within the scope of the WTA 2006 licence condition, but may instead be authorised through alternative mechanisms (such as Recognised Spectrum Access) in limited circumstances. The use of certain frequencies in the radio spectrum for short-range devices, such as alarms and radio frequency identification equipment, is exempt from the need to obtain licences. On 17 January 2025, Ofcom launched a consultation (which has since concluded) on updating and changing the relevant equipment licence exemptions. Following this process, Ofcom published a statement on 27 October 2025 confirming a range of changes including new licence-exempt uses and amendments to existing technical conditions, with a focus on international harmonisation and simplification of the regime. For completeness, the processes for obtaining licences for amateur users is handled separately, and an upgraded platform for doing so, Licensing Platform Evolution 3 was launched on 7 April 2025.

Ofcom's approach to spectrum award is to allow the market as much flexibility in how the spectrum is used without assigning it to a particular technology or application. While spectrum licences are most commonly awarded via auction, Ofcom can design these in such a way as to ensure that there is the greatest possible competition within the market. In March 2022, Ofcom released its Spectrum Roadmap, which was subsequently updated on 10 November 2022, to outline the work that Ofcom plans to do to deliver on the strategy to manage the UK's spectrum. There are three key themes:

- network evolution and divergence;

- accelerating innovation and sharing with spectrum sandboxes; and
- better data for better spectrum management.

In addition, the UK government's 2026 Statement of Strategic Priorities requires Ofcom to have regard to objectives including:

- driving growth through world-class fixed and wireless digital infrastructure;
- driving growth through maximising access to spectrum;
- supporting economic growth through transparent, competitive and fair retail market for consumers;
- maximising growth opportunities through secure and resilient telecoms infrastructure; and
- supporting growth through resilient and sustainable postal services.

Licence duration

Licences issued by Ofcom under WTA 2006 have varying durations depending on the type of licence granted. The mobile 3G licences granted in 2000 were subject to a fixed term of 20 years. Following the WTA (Directions to Ofcom) Order 2010, and subsequent consultation by Ofcom, mobile licences will continue for an indefinite period but remain subject to annual renewal fees and conditions of variation by Ofcom. ECNs and ECSs under the general authorisation regime are not subject to licensing requirements and, therefore, there is no set licence duration applicable to the provision of ECNs and ECSs.

On 11 January 2024, Ofcom published its response to the UK government's invitation to review its market-based approach to mobile spectrum management. Amongst other topics, Ofcom was invited to consider its current approach to the duration of licences granted. Following analysis of its own practices and comparison to the practices used in other European countries, Ofcom announced that it was planning on changing its approach, and that the licences being auctioned in its upcoming September 2025 auction will be for a fixed term of 15 years, and will then be reallocated.

Spectrum management

On 11 November 2024, Ofcom published the Information Memorandum for the award of licences in the 25.1–27.5GHz and 40.5–43.5GHz bands, providing details for parties considering bidding in the auction regarding the relevant spectrum, licence terms, and the award process. This was part of Ofcom's broader strategy to make 6.25GHz of spectrum available for mobile services globally, enhancing 5G deployment in Europe.

Ofcom's work on mmWave spectrum has progressed materially since May 2025. Following publication of the Information Memorandum in November 2024 for the award of licences in the 25.1–27.5GHz and 40.5–43.5GHz bands, Ofcom decided to implement new regulations, namely the Wireless Telegraphy (Limitation of Number of Licences) Order 2025 and the Wireless Telegraphy (Mobile Spectrum Trading) (Amendment) Regulations 2025, to facilitate the use of the 25.1–27.5GHz and 40.5–43.5GHz bands in major towns and cities. The Order authorises Ofcom to grant a limited number of spectrum access high density licences for

high-density areas, while the Trading Regulations enable these licences to be traded under existing mobile spectrum trading regulations.

Following the CMA's landmark approval of the merger between two major telecom entities on 5 December 2024, the UK mobile market successfully transitioned to a three-player market, deciding not to impose additional competition measures. The award process for the 26GHz and 40GHz bands reached critical milestones in late 2025. Following the submission of applications in September, the principal stage of the auction commenced in October 2025, under the Wireless Telegraphy (Limitation of Number of Licences) Order 2025 framework. The process was supported by the streamlined guidance introduced on 20 March 2025, which updated the process guidance for the auction, streamlining the timeline for withdrawals, bidder packs, and additional deposits. Optimising the timeline for bidder deposits and withdrawal protocols.

As of April 2026, the regulatory framework has continued to evolve in support of high-density 5G deployment. In March 2026, Ofcom finalised amendments to the terminal licence exemption regulations to extend coverage to the 26GHz and 40GHz bands, enabling wider commercial deployment of mmWave-capable equipment in major UK cities.

Modification of licences

Although ECNs and ECSs will not be subject to any direct licence modification, under CA 2003 Ofcom may impose changes to the General Conditions or specific conditions from time to time. CA 2003 requires that Ofcom publish a notice, outlining the proposed changes and justifying its reasons for these, providing a period for proposals from those providers affected of not less than one month. Variations to significant market power (SMP) conditions are subject to additional requirements, including that Ofcom must consider all representations made to it about the proposal and have regard to every international obligation of the United Kingdom as notified to it by the Secretary of State. Licences under WTA 2006 may be varied by Ofcom providing written notice to the licence holder or publishing a general notice to all holders of a class of licence.

Fees

Under the Digital Economy Act 2017 (DEA 2017), Ofcom is entirely funded through industry fees and charges. Communications service providers (with a revenue of more than £5 million) must pay a fee based on a percentage of relevant turnover set annually by Ofcom under its regulatory charging regime (0.1014% of relevant turnover for the year ending 31 December 2024). Operators that have Code powers under the Electronic Communications Code (conferring benefits such as not having to apply for a street works licence to install certain equipment) must also pay an annual fee to Ofcom, being a fixed annual charge set by Ofcom and updated periodically. The charge for 2026-27 is £1,000, or such other amount as may be set by Ofcom for the relevant charging year. Operators must also pay a one-off charge of (currently) £10,000 for Ofcom's cost of dealing with the application for Code powers.

Radio communications

Ofcom has the power under WTA 2006 to set fees concerning wireless telegraphy licences, other than for those awarded by auction. Under WTA 2006, Ofcom can prescribe

administered incentive pricing, allowing for fees to be set at above administrative costs to encourage efficient use of the spectrum. Ofcom must set out the fees through published regulations. Ofcom can either update existing regulations or publish new ones. Most recently, the Wireless Telegraphy (Licence Charges) Regulations 2020 came into force on 21 October 2020, and these have since been subject to periodic amendment as part of Ofcom's ongoing spectrum charging regime.

On 13 December 2024, Ofcom launched a formal review of its annual licence fees, and laid out proposals for revised fees for licence holders in the 900MHz, 1,800MHz and 2,100MHz spectrum. This included reducing the fees charged for licence holders in the 900MHz and 1,800MHz spectrum by 21%, and increasing the fees charged for licence holders in the 2,100MHz spectrum by 12%, resulting in a net reduction of fees paid of circa £40 million. The closing date for responses to these proposals was 7 March 2025, and Ofcom published its final statement and implemented decisions in July 2025 to revise the Annual Licence Fees it charges for use of the 900MHz, 1800MHz and 2100MHz bands as follows:

- for 900MHz spectrum, we will reduce the ALFs to £1.032 million per MHz (a 26% reduction from current levels);
- for 1800MHz spectrum, we will reduce ALFs to £0.760 million per MHz (also a 26% reduction from current levels); and
- for 2100MHz spectrum, we will increase ALFs to £0.722 million per MHz (a 6% increase from current levels).

Overall, this will reduce the total ALFs that MNOs pay from around £325 million per year to around £265 million per year.

Television and radio

Ofcom also charges licence fees for the radio and television sectors. The percentage of annual turnover payable varies according to the turnover of the operator or the operator is charged a flat fee, depending on the particular licence that they hold.

Public Wi-Fi

The Investigatory Powers Act 2016 (IPA 2016) applies to public Wi-Fi providers, which may result in them being required to retain and disclose communications data to authorities.

Law stated - 30 April 2026

Flexibility in spectrum use

Do spectrum licences generally specify the permitted use or is permitted use (fully or partly) unrestricted? Is licensed spectrum tradable or assignable?

In its Spectrum Roadmap Management Strategy and roadmap published in 2022, Ofcom emphasised the importance of providing as much flexibility as possible in spectrum licence conditions to liberalise licence rights. This approach is intended to allow licensees

to re-purpose their spectrum use without the need to seek a licence variation, where interference risks can be appropriately managed.

Ofcom's 2022 strategy identifies three principal licensing approaches for spectrum access. First, "technically assigned licences", that allow Ofcom to coordinate the individual assignment of frequencies within the band. These will be granted where various users apply to use the same spectrum and where failure to coordinate licensed users may result in harmful interference. Second, "light licences" that are available on request and do not require any assignment or coordination by Ofcom, which will be available where there is limited risk of interference between different users. Finally, "block-assigned licences" that provide access to a defined block of specific spectrum within a specified geographical area, with licensees responsible for managing spectrum use within that block. These are generally awarded by auction. Defining interference parameters remains an important tool for allowing licence owners to understand how they can use their own network and the possible interference levels they may experience.

Alternatively, there is the licence exemption for radio equipment if its installation or use is not likely to result in undue interference to other radio equipment. A user will not need a licence if their device complies with specified technical parameters, which means that most mass-market consumer devices are licence exempt.

Spectrum trading

Spectrum trading is permitted in the United Kingdom, with the prior consent of Ofcom only required for the trading of mobile licences. The laws governing such trading are:

- WTA 2006;
- the Wireless Telegraphy (Spectrum Trading) Regulations 2012;
- the Wireless Telegraphy (Mobile Spectrum Trading) Regulations 2011 (the Mobile Trading Regulations); and
- the Wireless Telegraphy (Spectrum Trading and Register) (Amendment) Regulations 2025, which amend the 2012 trading and register regimes.

Under the trading regime, the parties to a transfer must notify Ofcom of specified information relating to the transaction. Ofcom then publishes a notice setting out key details of the trade on the Transfer Notification Register and updates the Wireless Telegraphy Register, as appropriate. For transfers involving mobile spectrum licences, Ofcom's prior consent is required and Ofcom may impose further directions or conditions on the parties. Certain types of partial transfers are also permissible under the Mobile Trading Regulations, although these may be restricted to limit the number of available licences within particular frequency bands. Ofcom's produced its guidance on spectrum trading in March 2020, which provides further details.

Significant changes to the spectrum trading and register framework were implemented by the Wireless Telegraphy (Spectrum Trading and Register) (Amendment) Regulations 2025, following a consultation launched by Ofcom on 31 October 2024. These Regulations were published by Ofcom on 16 May 2025, and came into force on 2 June 2025.

The 2025 Regulations extend the scope of licences that may be traded and recorded on Ofcom's public registers. They permit the full transfer of rights and obligations, on both

an outright and concurrent basis, under Shared Access licences, including licences in the 2.3GHz, 26GHz and 40GHz bands. They also enable outright transfers of rights and obligations for Point-to-Point Fixed Links licences in the 7900–8400MHz band. In addition, the Regulations remove Self-Coordinated Links in the 64–66GHz band from the trading and register regimes, reflecting the withdrawal of that licence class, and authorise Ofcom to update the Wireless Telegraphy Register and Transfer Notification Register to include information about these newly tradable licence classes.

These amendments further align the spectrum trading regime with Ofcom's policy objective of promoting more flexible and efficient use of spectrum, including for local and shared wireless deployments.

Law stated - 30 April 2026

Ex-ante regulatory obligations

Which communications markets and segments are subject to ex-ante regulation? What remedies may be imposed?

Ofcom has powers to impose ex-ante regulations on markets where that market is found not to display effective competition. Under these ex-ante regulatory powers, Ofcom may impose certain SMP conditions on a communications provider where that provider is deemed to have SMP such that it can dominate a market, namely, it has a position of economic strength affording it the power to behave to an appreciable extent independently of competitors, consumers and customers. Before imposing any SMP regulation, Ofcom is required by the EECC to carry out market reviews to assess the level of competition in the relevant market. If a market is found effectively competitive (ie, no operator has SMP), Ofcom may not impose ex ante regulation and must remove existing SMP conditions where they are no longer justified. In 2002, the European Commission published guidance on how national regulatory authorities (NRAs) should approach imposing SMP conditions on a provider. These were updated in 2018 to reflect the developments into EU competition law generally as well as changes to the telecoms sector. While these materials continue to inform Ofcom's analytical approach, Ofcom's SMP decisions are no longer subject to EU institutional oversight following the UK's departure from the European Union on 31 December 2020.

Under the EU framework, the European Commission identified the set of markets in which ex-ante regulation may be warranted. In its Recommendation on Relevant Markets, adopted on 21 December 2020, only two markets were identified:

- wholesale local access provided at a fixed location (to ensure access-based competition in the broadband mass market); and
- wholesale dedicated capacity (which is mainly relevant for business use requiring a higher quality of connectivity).

As the UK NRA, Ofcom is required to carry out SMP assessments and review and report on existing SMP determinations on a five-year cycle.

The current position on SMP markets in the United Kingdom is as follows.

Business connectivity markets

On 28 June 2019, Ofcom published the final statement and concluded that it will continue to regulate what Openreach can charge providers to use their leased-line networks and imposed requirements on Openreach for repairs and installations. Openreach will also be required to give competitors in certain areas physical access to its fibre-optic cables.

Physical infrastructure market

On 28 June 2019, Ofcom decided on regulation that will allow all telecoms providers access to Openreach's network of underground ducts and telegraph poles.

Wholesale fixed telecoms market (Hull)

The Ofcom consultation published in July 2020 setting out regulation plans for five years from April 2021, including proposals to remove regulation from the wholesale fixed analogue exchange line, integrated services digital network 2 and 30, wholesale call origination and wholesale broadband access markets. Regulation to remedy KCOM's (formerly Kingston Communications) SMP will continue.

Wholesale fixed telecoms market (United Kingdom excluding Hull)

The Ofcom statement published on 18 March 2021 continues to allow all network operators access to Openreach's network of underground ducts and telegraph poles. Depending on local competition, Openreach may continue to be required to provide wholesale access to its network or be subject to a cost-based charge control. Ofcom did not impose price caps on full-fibre connections provided by Openreach.

Wholesale voice market

The Ofcom statement published on 30 March 2021 states the decision to deregulate wholesale call origination and remove mobile donor conveyance charges price cap, although these continue to be required to be set at cost. Regulation and charge controls on mobile call termination and wholesale call termination were retained. New internet protocol interconnection regulations were introduced.

TAR 2026

On 17 March 2026, Ofcom published TAR 2026, setting the regulatory framework for UK fixed telecoms markets for the period from April 2026 to March 2031. The review builds on the 2021 Wholesale Fixed Telecoms Market Review and largely maintains the existing regulatory model, introducing targeted adjustments rather than fundamental change. The TAR also expands the geographic scope of lighter-touch wholesale regulation in areas where infrastructure competition has developed, while strengthening certain competition safeguards and supporting the ongoing transition from legacy copper networks to fibre-based services.

Law stated - 30 April 2026

Structural or functional separation

Is there a legal basis for requiring structural or functional separation between an operator's network and service activities? Has structural or functional separation been introduced or is it being contemplated?

In 2005, BT gave binding undertakings to Ofcom under the Enterprise Act 2002 (EA 2002) under which it agreed to implement a functional separation of its network division – Openreach – from the rest of the BT group. Organisational boundaries and information barriers comprised the basis of this functional separation, with Openreach obliged to deliver products providing access to the first-mile infrastructure to all communications providers on a non-discriminatory basis.

The status and operation of Openreach was reviewed in 2016 with Ofcom considering proposals, including retaining functional separation with increased independence of Openreach's governance, along with stricter access and quality requirements for Openreach (following several criticisms levelled at BT alleging abuse of the Openreach monopoly, underinvesting in the UK's broadband infrastructure and charging high prices with correlating poor customer service). Following Ofcom's announcement of its intention to file a formal notification to the European Commission to commence the separation process, in March 2017, BT Group agreed to implement a legal separation of Openreach from the BT Group. On 31 October 2018, Ofcom published a notice confirming that BT was released from its EA 2002 undertakings given in respect of Openreach. Ofcom continues to monitor Openreach's strategic independence to ensure that the separation is operating in practice. If Ofcom is not satisfied that this separation does not work, a further option would be a structural separation that would see Openreach being completely separated from the BT Group.

Ofcom published its most recent Annual Monitoring Report on Openreach's strategic independence on 11 September 2025. In that report, Ofcom noted that it had received a limited number of reported breaches of the voluntary commitments made by BT in 2017 but concluded that there was insufficient evidence to warrant the opening of any new formal investigations during the relevant period. Ofcom stated that it continued to see evidence that the commitments were working as intended and that compliance was well-established and well-embedded across both BT and Openreach.

Furthermore, following Ofcom's open letter to industry associated with Openreach's fibre build in 2022, Ofcom reiterated in the September 2025 report that it had not identified evidence suggesting that Openreach was targeting competitors or taking decisions that were inconsistent with commercially rational behaviour. Ofcom stated that it would nevertheless remain vigilant in its monitoring, particularly in light of the continued rollout of fibre networks and the development of competition in wholesale broadband markets.

Law stated - 30 April 2026

Universal service obligations and financing

Outline any universal service obligations. How is provision of these services financed?

The law on universal service provision is partly derived from Directive 2009/136/EC (Universal Service Directive), which was incorporated into the EECC and implemented in the United Kingdom on 21 December 2020. Under the Electronic Communications (Universal Service) Order 2003, BT and KCOM, the designated Universal Service Providers in the United Kingdom, must comply with conditions aimed at ensuring the provision of universal service. The obligations include:

- special tariff schemes for low-income customers;
- reasonable geographic access to public phone boxes;
- a connection to the fixed network (including functional internet access); and
- the provision of a text relay service for customers with hearing impairment.

DEA 2017 established a power for the Secretary of State to include a broadband universal service obligation (USO) for a legally binding minimum level of broadband service with a connection of at least 10Mbps download speed and upload speeds of at least 1Mpbs by giving each household and business a new legal right to demand an affordable broadband connection up to a reasonable cost threshold. This was implemented through the Electronic Communications (Universal Service) (Broadband) Regulations 2018, which came into force on 4 December 2018. Ofcom designated BT and KCOM (in Hull) as the universal service providers to which broadband conditions are to apply. With the Broadband Delivery UK programme having brought fixed-line superfast broadband to more than 96% of the United Kingdom, the 2018 USO is geared towards achieving the final 4%.

Customers have the right to request an affordable broadband connection from BT or KCOM including requesting an upgraded connection should it not reach a download speed of 10Mbps and an upload speed of 1Mbps. If customers only have access to a service that is priced over £59.60 per month, there is the right to request a universal service connection.

The relevant provider will have 30 days from the request to confirm whether the customer is eligible. The customers will be eligible if their property does not already have access to affordable broadband and is not due to be connected by a publicly funded scheme within 12 months. The costs of providing connection will be paid for up to £3,400. If the required work costs more, the customers will have an option to either pay the additional costs or seek an alternative solution outside the universal service. Customers will pay the same price as anyone else on the same package, and this will be no more than £59.60 a month. Most people will get a connection within 12 months, but it may take up to 24 months.

The Electronic Communications (Universal Service) (Costs) Regulations 2020, which came into force on 15 June 2020, set out how universal service providers BT and KCOM will be compensated, including Ofcom rules for assessing the extent of the financial burden associated with the provision of universal services.

Law stated - 30 April 2026

Number allocation and portability

Describe the number allocation scheme and number portability regime in your jurisdiction.

Under retained EU law, end users have a right to keep their original telephone number when switching communications providers. Under its powers under CA 2003, Ofcom has laid out the conditions for number portability under General Condition B3. An end user's original service provider must provide them with a porting authorisation code in the shortest possible time when requested. The end user may then pass this code to a new provider and the porting must then take place within one business day.

In relation to mobile customers they can leave their network by sending a short, free text message without needing to call their existing provider. Ofcom has also banned mobile providers from charging for a notice period that runs after the switch date.

If a customer's request to port their number is being frustrated, the old provider will be put on notice and will have up to five days to resolve any issues. If it fails to do so, the customer has the right to trigger the process that will enable their new provider to override this obstacle. The customer will need to submit a complaint on Ofcom's website, which will be assessed by an independent industry panel.

Ofcom introduced a one touch switch (OTS) process that established revised processes that residential landline and broadband customers should use as well as changes to the information service providers must give residential customers when they want to switch. The OTS process was due to be applicable from April 2023, and after some implementation delays, it formally launched on 12 September 2024 (albeit, with a further six-week transition period). Ofcom announced in an industry letter on 11 October 2024 that it would terminate the use of the interim notification of transfer service at the end of the six-week transition period (24 October 2024), following which it will investigate individual operators for breaches of the OTS process requirement.

In addition, Ofcom and the Office for Telecommunications Adjudicator (OTA2), who had been brought on board to help with this transition to the OTS, conducted a joint review on matching under the new system. In this review, though they noted that there was good performance in some areas, Ofcom and OTA2 identified further areas of improvement. In a follow- up industry letter on 2 December 2024, Ofcom shared the findings of this review and directed relevant entities to improve their compliance as a matter of urgency. Following this, Ofcom announced on 31 January 2025 that it had sent an information request to certain operators to open an investigation into the industry's failure to implement OTS by the original deadline of 3 April 2023, in a potential breach of C7.18–C7.27 of Ofcom's General Conditions. As of April 2026, that investigation remains ongoing and no final enforcement decisions have been published.

Law stated - 30 April 2026

Customer terms and conditions

Are customer terms and conditions in the communications sector subject to specific rules?

In addition to being subject to general consumer protection legislation, including the Consumer Rights Act 2015, customer contracts in the communications sector are subject to sector-specific rules imposed by Ofcom under Part C of the General Conditions of Entitlement. Condition C1 imposes minimum information provision requirements in consumer contracts, including a maximum initial duration of two years and conditions for

termination. One of the matters to be disclosed includes details of prices and tariffs, which is further extrapolated under Condition C2. Under this condition, all operators must make available clear and up-to-date information on their prices and tariffs, as well as on their standard terms and conditions of access to, and use of, publicly available telephone services.

Condition C4 and CA 2003 further require that dispute resolution mechanisms provided by the communications provider or otherwise are accessible to their domestic and small business customers (ie, businesses with 10 or fewer employees). The two dispute resolution schemes approved by Ofcom for this purpose are the Ombudsman Services and the Communication and Internet Services Adjudication Scheme.

Ofcom has set out a number of fairness rules that require providers to (among other things):

- provide clear and honest information to prospective broadband customers concerning a minimum guaranteed speed before they commit to a contract;
- compensate broadband and landline customers when they experience difficulties and delays in receiving the service;
- inform customers before their contract comes to an end and explain their best available deal (including those available to new customers); and
- allow mobile phone customers to switch provider with a text message.

Any terms that are deemed to be unfair will not be binding on consumers and Ofcom has a duty to consider any complaint that it receives from a consumer about unfair standard terms and conditions. Under Part 8 of the EA 2002, Ofcom has enforcement powers against sellers and suppliers who breach consumer protection legislation.

In determining whether customers are treated fairly by communications service providers, Ofcom will consider the following aspects:

- how providers treat their customers throughout the customer journey;
- who is being harmed;
- the extent of the harm;
- the importance of the service; and
- whether the service depends on risky new investment.

Ofcom also publishes guidance on treating vulnerable consumers fairly. The latest version was adopted in September 2022 and, influenced by the cost-of-living crisis at the time, four key areas were revised to include additional good practice measures. These areas were:

- engagement with customers and proactively emphasising the support providers offer;
- strengthening links to the free debt-advice sector;
- measures taken by providers to effect payment; and
- social tariffs, whereby in essence, communications providers should assist those who are facing financial hardship in a more proactive way.

As a recent example of its powers being implemented to protect consumers, Ofcom issued a statement on 17 January 2025 that noted that it amended the General Conditions in order

to ban telecoms and pay TV providers from including inflation-linked or percentage-based mid-contract price rises in the terms of new agreements. This included amendments to C1 and the definitions under the General Conditions.

Law stated - 30 April 2026

Net neutrality

Are there limits on an internet service provider's freedom to control or prioritise the type or source of data that it delivers? Are there any other specific regulations or guidelines on net neutrality?

The principle of net neutrality was enshrined into law by Regulation (EU) No. 2015/2120 (the 2015 EU Roaming and Open Internet Access Regulation) (the 2015 Regulation) (implemented in the United Kingdom by the Open Internet Access (EU Regulation) Regulations 2016 – necessary for designating Ofcom as the UK national regulatory authority), which prohibits discrimination, interference or paid prioritisation affecting end-user access. It includes transparency rules requiring internet access services to publish information on any traffic management measure that could affect end users (in terms of quality, privacy and data protection), as well as information on fair use policies, actual speeds, data caps and download limits (among others). It further requires Ofcom to monitor and enforce the rules.

In October 2023, Ofcom issued guidance on net neutrality and open internet regulations. The guidance allowed internet service providers (ISPs) to offer premium quality retail packages and provided clarity on the development of "specialised services" with the advent of 5G and full fibre networks, which could include real-time communications, virtual reality, and driverless vehicles. The guidance further clarified the use of traffic management measures by ISPs to maintain good service quality and addressed zero-rating offers, where data used by certain websites or apps does not count towards a customer's overall data allowance, stating that such offers will generally be allowed.

Ofcom published its ninth Annual Monitoring Report on Net Neutrality in early 2026, covering the 2025-26 monitoring period. In that report, Ofcom concluded that the net-neutrality framework continued to operate effectively in the United Kingdom. It found no evidence of systemic non-compliance by ISPs and noted that growing data consumption had largely been accommodated without material degradation of service quality or widespread congestion. Ofcom observed continued improvements in network capability, including expanded gigabit-capable broadband availability and increased mobile data performance, alongside limited and proportionate use of traffic management measures.

The report also confirmed that retail offers and commercial practices generally remained consistent with net-neutrality requirements and that the use of specialised services continued to be relatively limited. Ofcom indicated that it would maintain its established approach of annual monitoring and data collection, including oversight of traffic management practices, zero-rating offers and the interaction between internet access services and specialised services, to ensure that end-user rights are protected as networks and services continue to evolve.

The 2015 Regulation now applies as retained EU law, as amended by the Open Internet Access (Amendment etc) (EU Exit) Regulations 2018 to address issues arising from

the United Kingdom exiting the European Union and provide for amendments such as removing references to "national regulatory authority", "common rules" and requirements for Ofcom to follow requirements set by the European Commission and the Body of European Regulators for Electronic Communications (BEREC). Following Brexit, Ofcom does not need to implement the BEREC guidelines but still considers them in compliance reviews where appropriate.

Law stated - 30 April 2026

Platform regulation

Is there specific legislation or regulation in place, and have there been any enforcement initiatives relating to digital platforms?

Ofcom's remit covers the following platforms:

- digital terrestrial television;
- digital audio broadcasting;
- radio; and
- video-on-demand (VOD) services.

Any other digital platforms are subsequently only subject to general competition law and sector-specific regulations.

Competition

The complex nature of digital platforms and the difficulties in understanding their competitive effects has led the UK government and the CMA to take a flexible and case-by-case approach to policing digital platforms.

The CMA published a report of its online platforms study in July 2020, recommending the implementation of a new pro-competition regulatory regime. The report proposed that a Digital Markets Unit (DMU) should be empowered to enforce a code of conduct to govern online platforms with market power and make pro-competitive interventions to tackle sources of market power. The government responded in November 2020, accepting the CMA's findings and commissioning the Digital Markets Taskforce to provide advice on the code of conduct. The DMU was established within the CMA on 7 April 2021 to focus on operationalising and preparing for the new regulatory regime. The Digital Markets, Competition and Consumers Bill received Royal Assent on 24 May 2024 and the regime came into force on 1 January 2025.

On 11 January 2024, the CMA published an overview of how it intended to implement the digital markets competition regime provided for under Part 1 of the Digital Markets, Competition and Consumers Act 2024 (DMCCA), including the outcomes the CMA seeks to achieve and a set of 11 principles underpinning how it will carry out its new role. The DMCCA empowers the CMA to designate firms with strategic market status (SMS) and impose conduct requirements to benefit UK consumers and businesses. Investigations into Apple and Google's SMS designation began in January 2025, and, in October 2025, the

CMA designated Google with SMS status in respect of general search services and mobile platforms and Apple with SMS status in respect of its mobile platforms, each until 2030.

The CMA launched a consultation on its proposals for conduct requirements for Google, following Google's SMS designation in general search services, in January 2026, and published responses received in March 2026. The CMA additionally opened a call for evidence on Apple's and Google's proposed commitments, made in response to their SMS designations, in February 2026, and published the companies' final commitments in April 2026. The CMA launched a further call for evidence in April 2026 seeking views on changes that Apple and Google have made (or propose to make) in relation to their app store rules. The CMA additionally announced that it will launch an SMS investigation into Microsoft's business software ecosystem in May 2026.

Wider digital regulation

On 6 July 2021, the UK government published its Plan for Digital Regulation, which aims to drive agile regulation, offering clarity and confidence to consumers and businesses. Regulation will be underpinned by three principles:

- actively promoting innovation;
- achieving forward-looking and coherent outcomes; and
- exploiting opportunities and address challenges in the international arena.

The Plan set out a timeline of strategy reviews and consultations that the government intended to undertake across three, six and 12 months, including areas such as artificial intelligence, cybersecurity, media literacy, innovation and national data. Further direction was outlined in June 2022 under the Digital Strategy, a cross-government strategy that sets out the government's agenda for digital policy. The strategy focuses on a number of key areas, including reforming and improving skills and talent provision for the digital economy. Progress against these objectives has been monitored through the government's Outcomes Monitoring Framework, most recently updated in October 2023.The UK government introduced new legislation for online safety, the OSA, in September 2023. The OSA establishes a new regulatory regime to combat illegal and harmful content online, and is the first regulation in the United Kingdom to specifically target providers of online platforms and search services by requiring them to actively monitor content through their platforms to ensure user safety.

On 18 March 2024, the UK government introduced its Digital Development Strategy 2024–2030, focusing on inclusive, responsible, and sustainable digital transformation. The strategy's four objectives were digital transformation, inclusion, responsibility and sustainability. It aimed to reduce the digital divide, enhance infrastructure, establish AI labs and support women's digital participation, while addressing connectivity, democracy, cybersecurity and green initiatives, leveraging UK expertise for global development.

From 2025 onwards, the UK government has progressively implemented the framework set out in its 2021 Plan for Digital Regulation, with a particular focus on strengthening digital governance and regulatory effectiveness. This has included the phased implementation of the DMCCA and the OSA, which together have significantly expanded the powers of the CMA and Ofcom. The digital markets and competition provisions of the DMCCA entered into force on 1 January 2025, empowering the CMA to designate firms with SMS and to impose

conduct requirements and pro-competitive interventions, while the consumer enforcement provisions followed on 6 April 2025. Further elements of the Act, including the subscription contracts regime, are expected to commence in the autumn of 2026.The CMA has moved rapidly into enforcement under the new regime. As of early 2026, it has completed its first round of SMS investigations, with Apple and Google formally designated as having SMS in relation to mobile platforms. Associated conduct requirements took effect from 1 April 2026. The CMA has also begun exercising its enhanced consumer enforcement powers, including the imposition of significant financial penalties.

Alongside competition reform, the UK government has continued to advance its digital transformation and artificial intelligence policy. In January 2026, it launched the Roadmap for Modern Digital Government (2025–2030), superseding earlier strategies. The roadmap mandates increased adoption of application programming interfaces across public services and establishes a new "school of government" to build AI capability and expertise within the public sector. In April 2026, the Technology Secretary announced ambitions for the United Kingdom to play a leading role in setting global standards for AI deployment, alongside a renewed focus on supporting domestic AI hardware capability and international collaboration with other mid-sized digital economies.

Law stated - 30 April 2026

Next-Generation-Access (NGA) networks

Are there specific regulatory obligations applicable to NGA networks? Is there a government financial scheme to promote basic broadband or NGA broadband penetration?

There is no legislation specifically directed at NGA networks in the United Kingdom. However, NGA and gigabit-capable broadband networks are regulated under the CA 2003 through technology-neutral competition law and sector-specific regulation applied by Ofcom, primarily through periodic market reviews. Ofcom has consistently stated that its role is not to direct or mandate particular investment decisions, but to ensure that incentives for efficient investment are not distorted by disproportionate regulation.

Pursuant to the undertakings entered into between BT and Ofcom in 2002, BT must allow its competitors access to its virtual unbundled local access points to foster competition over the supply of superfast broadband services to consumers. BT is also required to allow other providers the option of investing in NGA by giving access to its ducts and poles and other physical infrastructures.

In April 2021, the UK government announced the launch of the £5 billion Project Gigabit, in collaboration with Building Digital UK (BDUK) – now an executive agency within the DSIT. Project Gigabit is intended to support the rollout of gigabit-capable broadband to premises unlikely to be reached by commercial investment alone, primarily in hard-to-reach and rural areas. According to Ofcom's Connected Nation 2025 report, by July 2025, approximately 85.9% of UK premises had access to a gigabit-capable broadband connection. Following revisions to policy confirmed in the 2025 Spending Review, the government's longer-term objective is now to achieve at least 99% nationwide gigabit coverage by 2023.

The Gigabit Broadband Voucher Scheme continues to operate alongside Project Gigabit, supporting eligible homes and businesses by contributing to the costs of installing gigabit-capable connections in areas not covered by commercial or contracted deployments.

BDUK also continues to conduct National Rolling Open Market Reviews on a regular basis to assess existing and planned commercial broadband infrastructure and to determine eligibility for public subsidy across Project Gigabit and related interventions.

On 17 March 2026, Ofcom published its final Telecoms Access Review 2026–31, setting the regulatory framework for UK fixed and wholesale telecoms markets for the period from April 2026 to March 2031. The review is intended to maintain a pro-competition regulatory environment while supporting continued investment in gigabit-capable and full-fibre networks.

Ofcom confirmed that BT continues to have SMP in a number of wholesale markets and that access-based regulation remains necessary. The final measures include maintaining and strengthening rules governing Openreach's wholesale arrangements, retaining mandatory access to ducts and poles through Physical Infrastructure Access, and extending charge controls on wholesale broadband products to services supporting download speeds of up to 80Mbit/s. Higher-speed fibre products remain unregulated on price in order to preserve investment incentives.

The review also supports the migration from copper to fibre networks, including the closure of copper networks and exchange exit, building on the framework established in the 2021 Wholesale Fixed Telecoms Market Review. Ofcom has stated that it expects effective competition to develop across most wholesale markets by the end of the review period, but has retained discretion to continue regulatory intervention beyond 2031 where effective competition does not emerge.

Law stated - 30 April 2026

Data protection

Is there a specific data protection regime applicable to the communications sector?

Regulation (EU) No. 2016/679 (General Data Protection Regulation (GDPR)) governs data protection in the United Kingdom with effect from 25 May 2018. The GDPR was implemented into UK law under the European Union (Withdrawal) Act 2018 and the Data Protection Act 2018 (DPA 2018), which received Royal Assent on 23 May 2018 and came into force on 25 May 2018.The GDPR generally imposes stringent compliance obligations on both data controllers and data processors, alongside onerous information requirements, to ensure that the personal data of data subjects is afforded an adequate level of protection.

The UK GDPR and DPA 2018 are supplemented, in the communications context, by the Privacy and Electronic Communications (EC Directive) Regulations 2003 (as amended) (PECR), which implement the e-privacy framework. The PECR contains sector-specific rules relevant to providers of public electronic communications services, provide for measures such as:

- the safeguarding the security of a service by public ECSs;

- notice requirements, should there be any breaches of security;
- prohibitions on unsolicited or direct marketing communications;
- restrictions on the processing of user identity and location; and
- how long personal data may be held or held without modification.

Since May 2025, the data protection framework has been materially amended by the Data (Use and Access) Act 2025, which updates the UK GDPR, DPA 2018 and PECR. The Act is intended to reduce regulatory friction while maintaining core protections, and introduces, among other changes:

- greater flexibility around certain forms of automated decision-making;
- amendments to the PECR consent regime (including in relation to cookies);
- a new lawful basis of "recognised legitimate interests"; and
- enhanced enforcement and investigatory powers for the Information Commissioner, including higher maximum fines under the PECR.

IPA 2016 deals with data retention, interception and acquisition of communications data. The powers provided for in this law have been subject to various challenges since its inception. IPA 2016 was challenged in the courts in November 2018 when a human rights group won the right to a judicial review of Part 4 of IPA 2016, which gives government agencies powers to collect electronic communications and records without reason for suspicion. Following that, the Data Retention and Acquisition Regulations 2018 increased the threshold for accessing communications data to serious crime only and imposed a requirement on authorities to consult with an independent Investigatory Powers Commissioner before requesting data. In July 2019, the High Court dismissed a human rights group's further challenge against IPA 2016 powers on the basis that IPA 2016 includes several safeguards against the possible abuse of power and was therefore not in breach of the Human Rights Act 1998.

The Investigatory Powers (Amendment) Act 2024, which received Royal Assent in April 2024, introduced targeted amendments to IPA 2016. These changes aimed to address evolving threats from new technologies and sophisticated criminal groups. Key updates included the introduction of notification notices, which required operators to notify the Secretary of State of relevant changes to systems or services, helping to mitigate risks posed by technology that precludes lawful data access.

The Act also emphasised the importance of statutory codes of practice, providing guidance on the use of powers and ensuring safeguards to protect human rights. It introduced new regimes for handling bulk personal datasets, focusing on datasets with low or no expectation of privacy, and established criteria for assessing privacy expectations. Access to third-party bulk personal datasets was also controlled, requiring compliance with data protection laws.

Additionally, the review process for technical capability notices was clarified, ensuring operators had a clear framework for addressing concerns. These changes reflect a balance between enabling effective law enforcement and safeguarding individual rights, ensuring that the UK's investigatory powers remain robust and adaptable to future challenges.

Ofcom also has the responsibility of making sure the UK's telecoms networks are safe and secure, under TSA 2021. Ofcom has the power to monitor and enforce how providers comply with the TSA rules, including fines and enforcing interim steps to address security gaps.

Law stated - 30 April 2026

Cybersecurity

Is there specific legislation or regulation in place concerning cybersecurity or network security in your jurisdiction?

There is no single piece of legislation or regulation in place concerning cybersecurity or network security in the United Kingdom. It is instead covered by several pieces of legislation, such as CA 2003 (as amended by TSA 2021), the Privacy and Electronic Communications Regulations, the UK GDPR and the Network and Information Systems Regulations 2018 (the NIS Regulations). The NIS Regulations impose cybersecurity and incident reporting obligations on two classes of operator in the United Kingdom:

- relevant digital service providers; and
- operators of essential services (provided they operate in certain sectors and meet threshold requirements).

On 31 May 2023, Ofcom published its updated guidance for the NIS Regulations, including changes to the incident reporting thresholds for the digital infrastructure subsector. Ofcom offers guidance on how communications providers should implement technical and organisational security measures to manage the security risks of public ECNs and ECSs. On 6 September 2024, Ofcom published an updated Network and Service Resilience Guidance for Communications Providers. The Guidance aims to enhance network resilience by outlining measures such as designing networks to avoid single points of failure, implementing automatic failover functionality, and setting processes, tools and training for resilience. It specifically prioritises voice services, especially emergency calls, over other traffic types. Providers are encouraged to inform customers about service reliability and potential risks. While there may be additional costs for providers to amend their infrastructure, the benefits are considered to outweigh these costs. The guidance is flexible, applying to all types of communications networks and services, and providers are expected to consider it in their security duties. Furthermore, Ofcom initiated a Call for Input on power backup for mobile radio access networks, seeking to address potential harms from power outages, particularly in rural areas. The feedback highlighted the need for a broader approach to power backup beyond the telecoms sector. Ofcom plans to further analyse the information to determine if additional resilience measures are needed, working with government and industry to find suitable solutions.

CA 2003 requires public ECN and ECS providers to take appropriate technical and organisational measures to manage the ECNs and ECSs, the focus of which is to minimise the impact of security breaches on end users and the interconnections of public electronic communications networks. CA 2003 also imposes several notification requirements on these providers. TSA 2021 amended the CA 2003 to introduce new, overarching security duties on public ECN and ECS providers, including by taking appropriate measures to identify and reduce the risks of security breaches occurring. The PECR similarly impose

obligations on public ECSs to ensure that personal data is handled appropriately and subject to appropriate security policies.

Under the UK GDPR, data controllers and data processors must ensure that appropriate technical and security measures are put in place when handling a data subject's personal data. Where transfers are outside of the United Kingdom and are being sent to a country that does not have an adequacy decision given by the UK government, there is a need to have appropriate safeguards in place (eg, "standard contractual clauses" approved by the UK government), and following the ***Schrems II*** decision (an EU decision but which is followed through UK Information Commissioner's Office (ICO) guidance) this can include requirements for "supplementary measures" to protect the data. While supplementary measures can be contractual, there may also be requirements to have additional technical, organisational and security measures in place.

In July 2024, the UK government announced the introduction of a Cyber Security and Resilience Bill during the King's Speech, aiming to strengthen the UK's cyber defences and protect critical infrastructure and digital services. On 1 April 2025, the UK government published the Cyber Security and Resilience Policy Statement, detailing the legislative proposals for the Bill. The Bill addresses increasing threats from cyber criminals and state actors targeting essential services, including hospitals and government departments, and is intended to strengthen the UK's cybersecurity framework. As of April 2026, the Bill has not yet been enacted but remains a central component of the government's proposed reforms to cybersecurity regulation.

Key measures of the Bill include expanding the regulatory framework to cover more digital services and supply chains, enhancing the powers of regulators, and increasing incident reporting requirements to better understand cyber threats. Additionally, the government is considering further measures, such as bringing data centres into the regulatory framework and empowering the Secretary of State to direct regulated entities and regulators to take action for national security. These measures aim to ensure the regulatory framework can adapt to emerging threats and technological advancements. The Bill is part of the government's broader strategy to secure the digital economy, foster economic growth, and protect public services from cyber threats.

Law stated - 30 April 2026

Big data

Is there specific legislation or regulation in place, and have there been any enforcement initiatives in your jurisdiction, addressing the legal challenges raised by big data?

For the most part, the use of big data is primarily regulated through generally applicable data protection, competition and digital regulation frameworks.

However, the UK Data Use and Access Act 2025, alongside introducing changes to the UK GDPR, established new mechanisms for business and customer data sharing and created a digital identity verification framework. The Secretary of State is given powers to establish sector-specific Smart Data schemes through secondary legislation. These schemes will mandate the sharing of customer data and business data. Customer data is broadly defined as transactional data, usage data and contract and pricing data and business data includes

non-personal operational and pricing data. The intention being to create big-data market enablement.

In its Furman Report, published in March 2019, the Digital Competition Expert Panel recognised the importance of data as a competitive tool in the UK's digital market. Specifically, it saw how digital markets tended towards concentration, with limited degrees of in-market competition, leading to significant barriers to entry because of the accumulation of data by incumbent firms. Some recommendations, therefore, sought to enable greater personal data mobility and systems with open standards. The Panel also encouraged policies of data openness in granting access to non-personal or anonymised data to new market participants. The government accepted the recommendations of the Furman Report and announced the establishment of a new DMU that has a statutory footing following the implementation of the DMCCA on 1 January 2025. The DMU oversees the new regime for digital markets and monitors compliance with conduct requirements to govern the behaviour of platforms designated as having strategic market status.

The DMCCA introduced significant reforms to UK competition and consumer protection laws, particularly in the digital sphere. The digital markets and competition law provisions of the Act (including Parts 1 and 2) came into force in 2025, while the CMA's new direct consumer enforcement powers (Part 3) and updates to consumer protection law (Part 4) took effect in April 2025. The remaining provisions of the Act were brought into force in January 2026.

Key elements of the Act include empowering the CMA with enhanced enforcement powers, allowing it to decide on consumer protection law infringements and impose fines without court proceedings. The Act also establishes a new digital markets regulatory system and strengthens consumer protections, including in relation to "subscription traps" and fake reviews. In addition, it amends existing competition laws with the aim of promoting fair competition for businesses, supporting economic growth by promoting trust and confidence in the market.

The CMA has committed to a framework of proportionality, predictability, process, and pace (the "4Ps") with the aim of providing a supportive and transparent regulatory environment. Immediate next steps include continuing to open enforcement cases under the new regime but under the framework of the 4Ps, and working with stakeholders to address consumer law advice needs.

Law stated - 30 April 2026

Data localisation

Are there any laws or regulations that require data to be stored locally in the jurisdiction?

There are no data localisation requirements in the United Kingdom. However, the UK GDPR (as amended by the Data (Use and Access) Act 2025) restricts the transfer of personal data outside the United Kingdom unless specific conditions are met.

For restricted transfers, Organisations must ensure the destination country has a UK adequacy regulation or that appropriate safeguards – such as the International Data Transfer Agreement or the UK addendum, are in place. Under the 2025 reforms, Exporters must

perform a data protection test to ensure the level of protection in the receiving country is "not materially lower" than that required in the United Kingdom, and following the ***Schrems II*** decision (an EU decision but which is followed through UK ICO guidance) this can include requirements for "supplementary measures" to protect the data. Those supplementary measures can be either contractual or technical and organisational.

Law stated - 30 April 2026

Key trends and expected changes

Summarise the key emerging trends and hot topics in communications regulation in your jurisdiction.

AI regulation in the United Kingdom

On 6 June 2025, Ofcom published its Strategic Approach to AI for 2025/26, outlining its commitment to supporting innovation while mitigating risks arising from the use of AI across the sectors it regulates. Key elements of Ofcom's approach include the following:

- Regulation of AI technologies: Ofcom reiterates that it regulates services and regulatory outcomes rather than underlying AI technologies. Providers are therefore free to deploy AI without Ofcom's prior approval provided they comply with existing legal and regulatory duties. It reserves the ability to act quickly and proportionately where AI use undermines consumer protection, online safety or network security.
- Opportunities and risks from AI: Ofcom highlights significant opportunities for AI across spectrum, telecoms, post, broadcasting and online services. At the same time, it confirms that synthetic media, personalisation, and security and resilience remain cross-cutting AI risk areas, particularly in relation to deepfakes, AI-enabled scams and the impact of recommender systems on exposure to harmful content and media plurality. These risks are being addressed in part through codes of practice and guidance developed under the online safety regime.
- Capability to address AI risks: Ofcom is investing in technical AI research and testbeds, publishing large machine-readable datasets to support AI model development, and working with organisations such as the Digital Regulation Cooperation Forum (DRCF) and the Alan Turing Institute to provide regulatory clarity. Internally, Ofcom has developed significant technical capability, with around 60 AI experts within a wider team of over 100 technology specialists, and is trialling the use of AI tools to improve its own productivity and reduce regulatory burdens, while ensuring safe and secure deployment.
- Cooperation on AI issues: Ofcom continues to engage with the UK government (including on the AI Opportunities Action Plan and forthcoming AI legislation), other domestic regulators and international bodies on AI policy, standards and governance, including through the DRCF and international online safety networks. fora on AI policy and standards.
- Planned AI work: Ofcom's planned AI work includes further media literacy resources focused on AI, follow-on support for innovators after the DRCF AI and Digital Hub pilot,

continued horizon-scanning, and additional online safety research and guidance on AI-enabled harms, including harmful deepfakes.

Implementation of the OSA

Ofcom published an update on the progress of implementing the OSA in November 2025. The OSA imposes legal duties on online service providers to assess and mitigate risks of harm to UK users, including children, regardless of where the provider is based.

Phase One: Illegal Harms

In December 2024, Ofcom published the illegal harms statement, detailing the duties related to illegal content. Relevant service providers were required to complete an illegal content risk assessment by 16 March 2025. Ofcom has consulted on policy proposals for minimum standards of accuracy for accredited technology that deals with child sexual exploitation and abuse and terrorism content, and on draft guidance regarding the exercise of its technology notice powers. It was due to publish its final guidance by April 2026, although this is still awaited as at the date of writing.

Phase Two: Child Safety and Protection

Final guidance on age assurance for pornographic content was published in January 2025, and Ofcom is monitoring compliance. Children's access assessments were required to be completed by April 2025, with risk assessments due by July 2025. Draft guidance on protecting women and girls was published in February 2025, with final guidance published in November 2025. Ofcom has committed to publish a report on the effectiveness of age-assurance measures by July 2026, a report on the prevalence of content harmful to children by October 2026, and a report on children's use of app stores by January 2027.

Phase Three: Categorisation and Additional Duties

A select group of services were categorised as category 1, 2A, or 2B, and subject to additional requirements for safety and transparency. The UK government's secondary legislation setting the thresholds that determine which services would be categorised under the OSA was subject to legal challenge, which has delayed implementation. As at April 2026, Ofcom has confirmed that it plans to publish a register of categorised services in July 2026, with categorised services required to publish their first transparency reports by summer 2027.

The UK government announced in October 2025 that it would expand the list of "priority offences" under the OSA, to include content encouraging or assisting serious self-harm, cyberflashing, and online pornographic content depicting strangulation or suffocation. As at April 2026, Ofcom is considering how to give effect to these changes as part of the ongoing implementation of the OSA.

Cloud services market probe

Following a reference from Ofcom, which had carried out a market study on cloud services, the CMA published its final decision from its investigation into the UK cloud services market in July 2025, revealing that competition is not functioning optimally. The investigation found that the largest public cloud computing service providers dominate the market, each holding significant shares of customer spend, and that barriers to switching, technical constraints and certain software licensing practices restrict competition and limit customer choice.

To address these issues, the CMA is considering using new digital markets powers to designate these major providers with SMS and implement interventions. The CMA launched an investigation into Microsoft's business software ecosystem in March 2026, acting on a concern from its cloud market investigation that Microsoft's use of software licensing is reducing competition in cloud services. Furthermore, following engagement with the CMA, Microsoft and Amazon have set out actions on cloud egress fees and interoperability to support greater choice for businesses and public-sector organisations in the United Kingdom.

Ofcom Communications Market Report

Ofcom's annual statistical survey of developments in the communications sector was published in July 2025. The report is an interactive data portal containing all the major datasets for the UK communications markets. Ofcom identified certain key findings in its report, which include the following:

- decreases in the use of traditional communications services have continued;
- the demand for data across fixed and mobile connections continues to grow;
- growth in the use of data has been enabled by continued take-up of faster broadband connections; and
- overall audiovisual revenues nominally grew, while radio revenues nominally declined.

Ofcom's proposed Plan of Work 2026/27

In March 2026, Ofcom published its Plan of Work 2026/27, setting out how it intends to deliver on its three-year strategy to ensure effective communication.

Ofcom's proposed Plan of Work 2026/27 focuses on the following telecommunications and media topics:

- resilient, high-quality and affordable telecoms services, including implementing the TAR 2026 framework, and improving mobile connectivity;
- sustainable, affordable postal services across the United Kingdom that meet evolving customer need;
- trusted, high-quality media and protection for audiences across the United Kingdom;
- living a safer life online, with platforms incentivised to reduce harms and comply with the OSA; and
- enabling wireless services in the wider economy by meeting growing demand for spectrum and supporting innovation in mobile, satellite and other wireless services.

The UK government has published a draft Statements of Strategic Priorities (SSP) for telecommunications, the management of radio spectrum and postal services, which covers:

- fixed and wireless digital infrastructure, including gigabit-capable fixed telecoms connections, high-quality 5G networks, and modernisation of fixed and wireless telecoms networks;
- a transparent, competitive, and fair retail market for consumers;
- maximising access to spectrum;
- secure and resilient telecoms infrastructure; and
- resilient and sustainable postal services

The UK government's SSP for Online Safety was designated in July 2025, covering:

- safety by design;
- transparency and accountability;
- agile regulation;
- inclusivity and resilience; and
- technology and innovation

In March 2026, the UK government announced its intention to designate an SSP for Cyber Security and Resilience to drive better consistency in how regulators, including Ofcom, implement the NIS Regulations.

Ofcom is required to include in its annual reports an assessment of the steps it has taken in consequence of any designated SSPs. Ofcom's Three-Year Plan 2025–2028, which followed a consultation in December 2024, sets out its longer-term ambitions and priorities, including:

- internet and post: ensuring reliable, high-quality networks and fair consumer treatment, and maintain affordable postal services;
- media: promoting diverse and trusted content, fair competition and audience protection;
- online safety: enhancing platform transparency and governance and design services with user safety in mind;
- wireless economy: managing spectrum access efficiently, and supporting innovation and international engagement; and
- cross-cutting: supporting digital market regulation, promoting media literacy, and facilitating digital transitions.

Law stated - 30 April 2026

MEDIA

Regulatory and institutional structure

Summarise the regulatory framework for the media sector in your jurisdiction.

Broadcasting is regulated by the legislation set out in the above question with additional regulation from the Broadcasting Act 1990 (as amended by the Broadcasting Act 1996 and the Communications Act 2003 (CA 2003)) and the Media Act 2024.

Law stated - 30 April 2026

Ownership restrictions

Do any foreign ownership restrictions apply to media services? Is the ownership or control of broadcasters otherwise restricted? Are there any regulations in relation to the cross-ownership of media companies, including radio, television and newspapers?

Restrictions as to who can hold a broadcasting licence and control a broadcaster are set out in both the 1990 and 1996 Broadcasting Acts; these were revised by CA 2003, which relaxed these provisions. If at any point there is a change in control over the licence or the owner of the licence, they must notify the Office of Communications (Ofcom), which will ensure that no person disqualified from holding the licence has taken control. Ofcom will also undertake a review to ensure that change of control will not negatively affect the programme content. If Ofcom does believe certain aspects of the programming may change, it could vary the licence.

Those who will be disqualified from holding a broadcasting licence will generally fall under two categories:

- religious or political groups; and
- advertising agencies.

Although religious bodies are generally restricted from holding a broadcasting licence, there are exceptions to this rule. They may own licences for:

- local analogue radio and satellite;
- cable broadcasting;
- local digital sound programme;
- national digital sound programme;
- television restricted service;
- digital programme service; and
- digital additional service licences.

Ofcom also has a duty to ensure that any licence holder is a "fit and proper person", although there is no further guidance on this in the legislation. In the licence change of control form, Ofcom asks whether any of the new directors, shareholders, members or other relevant individuals have criminal convictions or if they have been declared bankrupt. However, the form notes that this will "not necessarily prevent" someone from holding a licence.

The Enterprise Act 2002 (EA 2002) includes specific restrictions on foreign state ownership of, or control or influence over, UK newspapers and news magazines. These provisions, introduced by the Digital Markets, Competition and Consumers Act 2024 (DMCCA) with

effect from 13 March 2024, require the Secretary of State to issue a foreign state intervention notice to the Competition and Markets Authority (CMA) where there are reasonable grounds to suspect that a "foreign state newspaper merger situation" has been, or may be, created. Following its investigation, if the CMA confirms that such a situation exists, the Secretary of State must make an order to prevent or unwind the merger.

On 23 July 2025, the Enterprise Act 2002 (Mergers Involving Newspaper Enterprises and Foreign Powers) Regulations 2025 were made, substantively to be treated as having come into force on 13 March 2024. The Regulations create limited exceptions to the prohibition on foreign state newspaper merger situations, inserted by the DMCCA. The exceptions include where:

- the foreign power's interest in the newspaper owner is held indirectly via a state-owned investor that holds no more than 15% of the shares or voting rights;
- the foreign power holds its interest by a person associated with the foreign power who owns no more than 0.1% of the interests in the newspaper owner; and
- the foreign power holds shares through an associated person and the associated person holds the shares via certain types of investment funds (eg. Individual Savings Accounts).

The stated policy aim of the Regulations is to avoid unintended consequences for broader foreign investment in the UK media sector.

In addition to the above, it is worth noting that the National Security and Investment Act 2021 (NSIA 2021) gives the UK government powers to review investments and intervene in transactions that may give rise to a national security risk. NSIA 2021 provides a mandatory notification regime that will apply to certain transactions involving entities that carry on activities in one of 17 "sensitive sectors". In March 2026, the Cabinet Office published a consultation response confirming amendments to some of the "sensitive sectors" and creation of two new split-out and one entirely new sector. "Communications" is listed as one of the original 17 sensitive sectors, meaning that acquisitions in this sector may require mandatory notification to the UK government for review. Following a review of the filed notification, the Secretary of State may:

- approve;
- approve with conditions; or
- outright prohibit or unwind the transaction.

Completing an acquisition that requires mandatory notification without approval (and without 'reasonable excuse') is a criminal offence under the regime.

On 21 May 2024, the UK government published guidance on how it would interpret the power to give a "call-in" notice under section 3 of NSIA 2021 (ie, the circumstances under which it will be able to investigate certain dealings in intellectual property where there is a perceived risk of harm to national security). It is anticipated that this will be reviewed at least every five years. In the guidance, there were not widespread changes made to the understanding of how this power would be applied. Rather, the UK government attempted to consolidate the existing legislation into a more digestible format, and particularly noted that there are three primary risk factors that it will consider when analysing each case on an individual basis:

- target risk;
- acquirer risk; and
- control risk.

Law stated - 30 April 2026

Licensing requirements

What are the licensing requirements for broadcasting, including the fees payable and the timescale for the necessary authorisations?

BBC

The main document that regulates the BBC is the founding charter. The current charter came into force on 1 January 2017 and will end on 31 December 2027. Under the current charter a unitary board was formed to replace the BBC Trust and BBC Executive. The board ensures that the BBC's strategy, activity and output are in the public interest. The Charter is subject to a government review, which opened on 16 December 2025, with the government expected to publish a white paper on the subject in 2026. The new draft Charter will also be debated in Parliament prior to the expiry of the current Charter. The BBC has called for:

- the removal of the Charter's fixed end date;
- changes to board appointments;
- the funding decision-making process; and
- the modernisation of applicable regulations in line with evolving audience behaviours.

In parallel, the Department for Culture, Media and Sport (DCMS) is also reviewing the BBC's funding model (with any changes to be made after the expiry of the current licence period) to consider alternatives to the current licence fee model.

Also, from 2017, the BBC fell under the remit of Ofcom and the BBC must comply with an operating licence that is set by Ofcom. The most recent licence came into effect in March 2024, and was last amended on 18 December 2025 (where Ofcom approved changes to the BBC's current affairs and local radio programming quotas, and removing the requirement for the BBC to report the number of hours of live commentary for each sport on BBC Radio 5 Live).

Channel 4

The most recent licence for Channel 4 came into effect in January 2025, following a 2023 consultation and 2024 decision by Ofcom. Channel 4 previously operated on a digital replacement licence that replaced its original analogue broadcasting licence in 2004. The 2017 variation to the previous licence provided for the clearance of the 700MHz band for mobile data use by 1 May 2020 (note that the 700MHz digital terrestial television (DTT) Clearance Programme was completed on 20 August 2020).

On 6 December 2023, Ofcom published a consultation on the renewal of Channel 4's licence, which was due to expire on 31 December 2024. The proposals aimed to allow Channel Four Corporation to transition to being a "digital-first" broadcaster, whilst ensuring continued investment in its UK content and protection of the delivery of the core elements of its output on Channel 4. Following the consultation period through early 2024, Ofcom published its decision regarding a new 10-year broadcast licence for Channel 4 on 15 October 2024. Amongst other changes, this included an acknowledgement of Channel 4's aspiration to transition to being a "genuinely digital-first public service streamer" by 2030, and an increase in the quotas for productions being outside England to ensure that Channel 4 is supporting the creative economy beyond London and England.

An amendment to the licence, to update it in light of the Media Act 2024, was entered on 17 December 2025.

Channels 3 and 5

The most recent licences for both Channels 3 and 5 came into effect in January 2025 and will remain in place until 31 December 2034, following the conclusion of a multi-stage relicensing process by Ofcom. These licences replace Channels 3 and 5's digital replacement licences, which came into effect in 2004 to replace the original analogue Channel 3 and 5 licences. The current licence maintains the regional programming commitments in Channel 3 licences for English regions; and the creation of a more localised Channel 3 news service, which also lowered obligations. These arrangements were originally implemented following Ofcom's approval of ITV's proposals to deliver more tailored regional news, alongside a reduction in other regional programming obligations. Earlier variations made in 2017 addressed technical matters, including the provision for the clearance of the 700MHz band for mobile data use by 1 May 2020 (note that the 700MHz DTT Clearance Programme was completed on 20 August 2020). Ofcom published a report in 2022 in anticipation of this new licensing round for the Channel 3 and Channel 5 services. On 1 March 2024, Ofcom confirmed that it had decided to renew the licences for Channels 3 and 5 for a further 10 years. The formal licences were published on 1 September 2024, and included a review of the financial terms under which the licences were being granted.

An amendment to the Channel 5 licence was published on 19 December 2025, to update it in light of the Media Services Act 2024.

Digital television programme services

Other than those provided by Channels 3, 4 or 5, digital television programme services (DTPS) licences cover the provision of television programme services. The broadcasts covered will be in digital form for general reception on a digital television terrestrial multiplex. They will also cover ancillary services such as subtitling.

Digital television additional services licences cover television services text and data services including teletext and electronic programme guides. These are not covered by DTPS licences as they are not considered an ancillary service or digital television programme services. They are broadcast in a digital form on a digital television multiplex.

Where these are delivered via VOD services, these programmes will be subject to additional regulation via the Media Act 2024 (considered further below).

Television licensable content services

A television licensable content services (TLCS) licence covers services broadcast from a satellite, distributed using an electronic communications network (ECN) or electronic communication service made available by a radio multiplex. Its principal purpose must be the provision of television programmes or electronic programme guides or both. The service must also be available for reception by members of the public.

Services such as Channels 3, 4 and 5, covered by the other licences outlined in this section, do not require a TLCS licence. Internet services, pure VOD services and two-way services, such as videophone, do not require a TLCS licence.

The most recent version of the Ofcom guidance on applying for a TLCS licence was published on 22 September 2025.

A new local television licence regime was created as part of the Local Digital Television Programme Services (L-DTPS) Order 2012. An L-DTPS will have sufficient capacity at its location for one standard-definition digital service on the local multiplex. These are operated on Multiplex L.

Under the Broadcasting Act 1990, Ofcom must not grant a licence to any person unless it is satisfied that the person is a "fit and proper" person to hold it and is not disqualified by statute from holding the licence. The proposed service cannot be contrary to the standards objectives laid out in CA 2003.

The complete Ofcom tariff table, as regularly updated, is available online. The tariffs for 2026-27 were published on 26 March 2026.

Radio

Under CA 2003, Ofcom has the authority to regulate the following concerning independent radio services:

- analogue sound broadcasting services at a national or local level;
- radio licensable content services (services provided in digital or analogue form, broadcast from a satellite or via an ECN, for use by the public and consisting of sound programmes);
- additional radio services (a service consisting of the sending of signals for transmission by wireless telegraphy using space capacity within signals carrying any sound broadcasting service);
- digital radio multiplex services;
- digital sound and digital additional sound services at both a national and local level (text and data services not intended to be related to programming); and
- radio restricted services (licences intended to cover small-scale community uses).

Fees, duration and permissible content vary depending on the type of licence to be granted. Ofcom suggests that the easiest way to set up a radio service is to start an online radio station. Ofcom currently does not regulate online-only radio services that, therefore, do not require a licence from Ofcom.

Law stated - 30 April 2026

Foreign programmes and local content requirements

Are there any regulations concerning the broadcasting of foreign-produced programmes? Do the rules require a minimum amount of local content? What types of media fall outside this regime?

CA 2003 contains a limited number of provisions covering the broadcasting of foreign programmes. Regulations set out in Directive 2010/13/EU (Audiovisual Media Services) (as amended by Directive (EU) 2018/1808 and incorporated into the Broadcasting Code), require that where practicable, European production (referred to as European Works) should account for over 50% of the transmission hours of each broadcaster established in that market (subject to certain exclusions).

The amending Directive (EU) 2018/1808 provided, among other things, for an increased European Works content quota for on-demand services, raised from 20% to 30%. The United Kingdom was required to fully implement the amending Audiovisual Media Services Directive despite its exit from the European Union, as the date for implementation (19 September 2020) fell before the end of the Brexit transition period. Despite the UK's exit from the European Union, works produced in the United Kingdom are still considered to fulfil the definition of European Works, as European Works are defined by reference to production by ECTT countries, rather than EU member states. As a result, there may not be a significant downturn in demand for UK-produced works, as they will continue to help fulfil European Works quotas post-Brexit.

Also, the Secretary of State maintains powers under CA 2003 to disallow foreign television and radio should it fall foul of provisions in CA 2003 (eg, those that offend against taste or decency). There are no equivalent foreign restrictions for online and mobile content.

Ofcom also has the power to require local programming to be included in the output of broadcasters where appropriate. An example of this is in Ofcom's inclusion in every Channel 3 licence of a condition requiring a regional channel with programmes targeted at persons living in the area. The BBC's licence (which is also set by Ofcom) also contains quotas to broadcast local and regional programmes; this was updated on 18 December 2025 to exclude shared programming from the local programming quota for broadcasts between 6am and 2pm on weekdays, which are key listening hours.

The Media Act 2024 was introduced with the aim of giving domestic public service broadcasters a more flexible remit for the programmes they produce and show by replacing the "purposes" and "objectives" from CA 2003. The Act received Royal Assent on 24 May 2024. Ofcom's implementation roadmap for the Media Act has been rolled out across 2025 and is scheduled to continue to be delivered over the course of 2026.

The first related regulations were published under the Media Act 2024 (Commencement No. 1) Regulations 2024 on 15 August 2024. Ofcom publishes regular updates, including an interactive timeline of consultations and proposed implementations of various sections, on its website, including a review of its progress to date in February 2026.

Law stated - 30 April 2026

Advertising

How is broadcast media advertising regulated? Is online advertising subject to the same regulation?

Ofcom's role under CA 2003 is to regulate advertising on broadcast media to ensure advertising rules and standards are met. These rules and standards can be found across several instruments. Primarily, broadcast media must follow the UK Code of Broadcast Advertising (the BCAP Code), which covers misleading advertising, protection of children, harmful and offensive content, a ban on political advertising, and rules on environmental claims, to name but a few. Additional rules are contained in Ofcom's Broadcast Codes, which cover issues such as taste, decency and product placement. Enforcement of the aforementioned rules, while ultimately Ofcom's responsibility, has been largely contracted out to the Advertising Standards Authority and its associated bodies.

One of the key amendments to the Audiovisual Media Services Directive, which were approved by the European Parliament in October 2018, was to introduce new rules concerning the proportion of daily broadcasting time that would be taken up by advertisements. Under the new rules, advertising can take up a maximum of 20% of the daily broadcasting period between 6am and 6pm, but broadcasters can adjust their advertising slots within this time period so long as they do not exceed the total 20% limit. The new rules also introduce a prime-time window between 6pm and midnight, during which advertising will also only be allowed to take up a maximum of 20% of broadcasting time.

Product placement, while allowed in films, series made for television, sports programmes and light entertainment programmes (both foreign and national), is prohibited in news, children's, current affairs, religious and consumer affairs programmes. There are also rules requiring special logos to be shown at the beginning and end of the programme, as well as at the end of each advertising break to signify the use of product placement.

There are strict rules on advertising and product placement in children's television programmes and content available on VOD platforms introduced under the amendment to the Audiovisual Media Services Directive approved in November 2018.

Ofcom released a statement in December 2020, setting out the amendments to the Broadcasting Code and the Code on the Scheduling of Television Advertising. These amendments included changes to the rules in the Broadcast Code to reflect revised definitions, and product placement restrictions resulting from the Audiovisual Media Services Regulations.

Online advertising is subject to the Code of Non-broadcast Advertising and Direct and Promotional Marketing (CAP Code), which imposes similar standards and rules. The CAP Code also contains the rules that apply to VOD services. While there are some differences between the codes, the BCAP Code states that BCAP works closely with CAP to provide, as is practicable and desirable, a consistent and coordinated approach to standards-setting across non-broadcast and broadcast media.

Online advertising is also subject to the DMCCA, which prohibits advertising practices such as fake or misleading reviews and "drip pricing". Entities designated as possessing "strategic market status" will need to comply with additional rules on facilitating transparency and open choices. The CMA has published guidance on compliance with the DMCCA and enforcement,

as well as an update in April 2026 of its consumer protection activities to date. The CAP and BCAP Codes have been updated to incorporate the new requirements under the DMCCA.

The OSA also includes measures aimed to combat fraudulent advertising, and the Advertising Standards Authority offers a tool for consumers to report fraudulent adverts that they encounter online.

Following the UK government's consultation on possible options for reform to the regulatory framework for paid-for online advertising in March 2022, the UK government published its formal response to the consultation in July 2023. In that response, the government committed to addressing harmful advertising practices, particularly those affecting children.

As part of this, the DCMS established the Online Advertising Taskforce. The taskforce was created to deliver a programme of work to help address "in-scope harms" (eg, illegal advertising or children being served advertising for products or services that it would be illegal for them to purchase, or both). As well as its existing working groups on age assurance, gold standard, influencer marketing, information sharing, intermediary and platform principles, its remit was expanded in 2025 with the addition of an AI group. Its Terms of Reference were refreshed in November 2025 to establish a new working group on Ad Fraud and Standards, as part of the government's wider Fraud Strategy.

Law stated - 30 April 2026

Must-carry obligations

Are there regulations specifying a basic package of programmes that must be carried by operators' broadcasting distribution networks? Is there a mechanism for financing the costs of such obligations?

Under CA 2003, public service broadcasters (PSBs), including (but not limited to) the BBC, ITV, Channel 4 and Channel 5, must provide PSB channels to all the main distribution platforms. As a result, such channels have a right to be carried on all the main platforms on a free-to-air basis. Ofcom has a responsibility under CA 2003 to review and report on the extent to which the PSBs have fulfilled the purposes of PSB and make recommendations regarding how to maintain and strengthen the quality of PSB in the future, with reviews taking place every five years. The purposes of PSB in the United Kingdom are:

- to provide a variety of programmes on a wide range of subject matters;
- to provide television services that are likely to meet the needs and interests of as many different audiences as practicable (as well as those of the actual available audiences); and
- to maintain high standards in respect of programme content, development and skill, and editorial integrity.

On 17 December 2024, Ofcom published its Review of Public Service Media 2019–2023, which concluded that the PSBs had continued to deliver their public service purposes but face growing challenges in reaching audiences as viewing shifts from linear television to on-demand and online services and competition from global streamers and video-sharing platforms (VSPs) intensifies. The review found that PSB content – in particular trusted, duly accurate and impartial news and UK-originated programming that reflects the whole

of the United Kingdom – remains highly valued, but warned that declining TV licence and advertising revenues and rising content and distribution costs threaten the long-term sustainability of public service media (PSM). Ofcom indicated that the next phase of its work, including a further report due in 2025, would consider how the regulatory framework (alongside the new availability and prominence provisions introduced by the Media Act 2024) can support the continued universal availability and discoverability of PSB services across both traditional broadcast and online distribution, and help maintain and strengthen investment in UK-originated content.

Published on 21 July 2025, Ofcom's report (Transmission Critical: The future of Public Service Media) warned that, although PSBs remain the main providers of trusted news and UK content, rapid shifts to on-demand and VSPs and declining real-terms licence fee and advertising revenues are putting the universality and financial sustainability of PSM at risk. The report calls for stronger prominence for PSB content on connected TVs and major third-party platforms such as YouTube, more stable funding (particularly for news, local news and children's programming), and early clarity on the long-term future of TV distribution, including any move away from DTT, so that PSB services remain widely available and easy to find.

In relation to developments affecting "must-carry" in the online environment, implementation of the Media Act 2024 has progressed materially over the past year, creating a new online availability and prominence regime for designated PSB on-demand players on designated connected TV platforms (television selection services). In December 2025, Ofcom published its final report to the Secretary of State recommending 15 television selection services for designation, and in January 2026 Ofcom opened a consultation on a draft code of practice and draft guidance (including on the statutory "agreement objectives") intended to guide how designated platforms and PSBs agree the practical and commercial arrangements for inclusion and prominence of designated PSB players. Government has also indicated it intends to designate the relevant services by statutory instrument and is minded to agree with Ofcom's recommended list.

Alongside the decline in viewership of PSB channels, the debate concerning the television licence fee has increased. The government has continued to state that it is committed to upholding the licence fee until the end of the BBC charter period (2027). In February 2026, the DCMS confirmed the cost of a standard colour TV licence will rise to £180 from 1 April 2026 (in line with inflation, consistent with the existing settlement), and reiterated continued support for the "Simple Payment Plan" to assist households in severe financial difficulty.

Law stated - 30 April 2026

Regulation of new media content

Is new media content and its delivery regulated differently from traditional broadcast media? How?

New media content is regulated under the same broadcast content rules and legislation as broadcast media, so, for example, internet protocol television services simply require the same licences as they would for the same content offline. Following the Audiovisual Media Services Directive, the United Kingdom (through Ofcom) regulates VOD content and advertising. Rules include several minimum content standards, and on-demand services are

subject to the UK Code of Non-Broadcast Advertising, Sales Promotion and Digital Marketing. The amendments made to the Audiovisual Media Services Directive in November 2018 extended its scope to VSPs in addition to VOD providers.

The Media Act 2024 builds on this framework by introducing statutory Standards and Accessibility Codes specifically for larger ("Tier 1") VOD services, bringing them more in line with the standards expected of traditional broadcasters. Secondary legislation (in force from 1 April 2026) provides that an on-demand programme service (including certain non-UK services) is a Tier 1 service if it has an average number of monthly UK uses exceeding 500,000 (with BBC on-demand services excluded). The Standards Code includes regulations on harmful content, age-appropriate ratings, and impartiality, and the Accessibility Code includes regulations on features like subtitles, audio descriptions, and sign language. Ofcom is granted the authority under the Act to enforce these standards, which includes imposing fines and mandating content removal when necessary. These reforms are designed to update regulations in response to evolving viewer habits and ensure that major streaming platforms like Netflix, Amazon Prime Video and Disney+ adhere to consistent content and safety standards alongside traditional UK broadcasters. In October 2023, Parliament passed the Online Safety Act (OSA). This applies to providers including search engines, messaging services, websites and online forums and captures not only services based in the United Kingdom but those based elsewhere that target UK users.

The OSA introduces a host of new duties, including obligations to prevent fraudulent advertising, remove illegal and harmful content quickly and implement and enforce age limits, as well as creating new criminal offences. The provisions are wide-ranging but focus on protecting users (in particular children) from online harm.

Ofcom is also granted new responsibilities as the independent regulator for online safety. Under the OSA, Ofcom is given the power to fine companies up to £18 million, or 10% of qualifying revenue (whichever is greater), if they fail in their new duty of care.

In light of the OSA, VSPs are subject to the new communications offences, Ofcom's new information and enforcement powers, and fee notification requirements. Amendments to the Audiovisual Media Services Directive that extended its scope to VSPs have now been superseded in the United Kingdom by the OSA framework, with Ofcom confirming that the UK VSP regime was repealed on 25 July 2025, and in-scope VSPs are now regulated in full under the OSA.

Illegal content and protection of children duties have applied since March 2025 and July 2025 respectively. Illegal content duties require providers of relevant in-scope services to:

- carry out an illegal content risk assessment;
- implement proportionate safety measures under the relevant duties; and
- comply with associated record-keeping and review obligations.

Protection of children duties require providers of services likely to be accessed by children to:

- carry out a children's risk assessment within the applicable statutory time frame;
- put in place protections for children on the service; and
- comply with the associated record-keeping and review obligations.

Once the official register of categorised services is published by Ofcom (expected in July 2026), those services categorised as 1 or 2A will be subject to additional duties related to transparency reporting and risk assessments.

Law stated - 30 April 2026

Digital switchover

When is the switchover from analogue to digital broadcasting required or when did it occur? How will radio frequencies freed up by the switchover be reallocated?

The UK digital television switchover commenced in 2008 and was completed in 2012. The 600MHz band was auctioned in 2013 on an interim basis (running until 2026), and the remaining freed analogue television channels have yet to be allocated.

Under the Digital Economy Act 2010, the Secretary of State was given the power to nominate the digital switchover for radio broadcasting. The UK government set the following criteria to be met before the switchover could commence:

- digital listening must reach 50% of all radio listening (including via television and digital audio broadcasting (DAB));
- national DAB coverage must be equal to analogue coverage; and
- local DAB must reach 90% of the population.

Ofcom's Communications Market Report, published on 30 September 2020, indicated that DAB radio listening had reached 58%. Despite this, the DCMS announced in October 2021 that the digital switchover had been put on pause until at least 2030. In February 2026, however, DCMS launched a further review of the radio and audio sector to consider, among other things, whether there should be a managed transition away from FM in the 2030s and, if so, over what timescale, with the review expected to conclude in autumn 2026.

Law stated - 30 April 2026

Digital formats

Does regulation restrict how broadcasters can use their spectrum?

Although licences may set out certain restrictions in terms of information requirements and governing codes or guidance, broadcasting licences are not restrictive in terms of how the spectrum may be used for programme delivery. However, use of spectrum for terrestrial broadcasting is subject to technical requirements, and relevant multiplex operators are required to comply with Ofcom's broadcast technical codes.

Law stated - 30 April 2026

Media plurality

Is there any process for assessing or regulating media plurality (or a similar concept) in your jurisdiction? May the authorities require companies to take any steps as a result of such an assessment?

In line with its statutory obligation to review the operation of the media ownership rules every three years under section 391 of CA 2003, Ofcom released a statement in November 2021 on the future of media plurality in the United Kingdom following a call for evidence in June 2021. In this statement, Ofcom identified three features of the modern UK media landscape that may present a risk to media plurality, but are not captured under the existing regulatory framework, namely:

- online intermediaries and their algorithms control the prominence given to different news sources and stories;
- the basis on which online intermediaries serve news via their algorithms is not sufficiently transparent; and
- consumers do not always critically engage with the accuracy and partiality of online news.

As such, in its 2021 report, Ofcom recommended that Parliament update the current media ownership rules (to capture a broader range of new creators, beyond print newspapers and broadcasters) with the objective of promoting plurality, and that the Secretary of State broadens the scope of the existing public interest test for media mergers framework. Ofcom published an updated review of the media ownership rules in November 2024, with this report reiterating the recommendations of the 2021 report and proposing no new recommendations. The current four broad media ownership rules that Parliament has put in place in the United Kingdom (and that are set out in Ofcom's November 2024 Review of the Media Ownership Rules) are set out below:

- the national cross-media ownership rule: this rule prevents a newspaper operator with a 20% or more market share of newspaper circulation from holding a Channel 3 licence or a stake in such a licence of more than 20%, and and prevents the holder of a Channel 3 licence from holding an interest of 20% or more in a large national newspaper operator;
- the Channel 3-appointed new provider rule: this rule requires regional Channel 3 licensees to appoint a single news provider among them;
- the public interest test for media mergers: this test allows the Secretary of State to intervene in a merger involving a broadcaster or newspaper enterprise, where that merger meets certain value or market share requirements. The Secretary of State may choose to issue an intervention notice triggering a review if a merger might result in harm to the public interest; and
- the disqualified persons restrictions: certain bodies or persons must first be approved by Ofcom before holding certain kinds of broadcast licence to prevent undue influence over broadcasting services.

Following Ofcom's 2024 report, secondary legislation was introduced amending EA 2002. These amendments:

- update the scope of the media public interest considerations by replacing "newspapers" with "news media" (to cover both newspapers and news programmes);

- update the definition of "newspaper" for mergers in relation to which the Secretary of State has given an intervention notice, so that "publication" expressly includes online publications; and
- create exceptions within the foreign state influence provisions, such that a foreign power will not be treated as able to "control or influence" a newspaper merely because shares are held indirectly via a state-owned investor up to 15% (plus investment-fund type exceptions).

Intervention by the Secretary of State on the grounds of public interest under the EA 2002 includes the need for accurate presentation of news and free expression of opinion in newspapers, the need for a plurality of persons who control the media and the need for UK-wide broadcasting that is both of high quality and likely to appeal to a variety of tastes and interests. Where a public interest ground applies, the Secretary of State need not assess as to whether there would be a substantial lessening of competition by the merger (as would otherwise be required).

Detailed guidelines from 2004, by the former Department for Trade and Industry, set out those situations where the Secretary of State may intervene in merger situations involving media organisations, including cross-media mergers (eg, where there is a merger between a newspaper and a Channel 3 or 5 licence holder). The Secretary of State may intervene where the merger involves entities from outside the European Economic Area. The policy is not for the Secretary of State to intervene where the mergers are related to satellite and cable television and radio services.

In a recent exercise of these powers, the Secretary of State issued a public interest intervention notice (PIIN) concerning the anticipated acquisition of Telegraph Media Group Holdings Limited (TMG) by Daily Mail and General Trust Plc on 12 February 2026. The PIIN was issued on grounds of a potential lack of plurality, and required the CMA to investigate and report on jurisdictional and competition matters, and Ofcom to report on how the transaction may affect public interest considerations. Ultimately, this transaction did not take place, with TMG instead being purchased by German media group Axel Springer prior to the deadline for Ofcom and the CMA to provide their reports.

In a previous example, which also concerned an anticipated acquisition of Telegraph Media Group Limited, a PIIN was issued on 26 January 2024. This was in relation to the proposed sale of the Telegraph media group, including the Daily Telegraph newspaper, to RB Investco Limited (RBIL). RBIL was ultimately owned by RedBird Capital IMI – a joint venture between RedBird Capital and a state-funded enterprise of the UAE. As a result and alongside concerns over foreign ownership of a UK newspaper, legislation was eventually proposed to amend the 2002 Enterprise Act to allow the UK government to prevent such foreign control over a UK newspaper. As a result, RBIL eventually pulled out of the deal.

Law stated - 30 April 2026

Key trends and expected changes

Provide a summary of key emerging trends and hot topics in media regulation in your country.

Media Act 2024

The DCMS published the draft Media Bill on 29 March 2023, based on the 2022 white paper "Up next – the government's vision for the broadcasting sector". The draft Bill aimed to modernise the CA 2003 and promote UK PSBs and UK radio.

The draft was formally introduced in Parliament late in 2023, and it received Royal Assent on 24 May 2024, becoming the Media Act 2024.

The Act consists of seven Parts, which include provisions around radio licensing and regulation, increased quotas to ensure VOD is accessible to those with disabilities and requirements for smart-speaker platforms to give listeners access to UK radio stations.

The Act introduces provisions to extend the "prominence" regime – which guarantees a prime spot for PSB channels on electronic programme guides – to VOD services. The current regime is governed by Ofcom's code of practice under CA 2003 and to the new rules require VOD providers to comply as part of their regulatory obligations.

As part of implementation, Ofcom has progressed work on the new prominence regime for PSB on-demand services on connected TV platforms ("television selection services"), including publishing its final report to the Secretary of State in December 2025 recommending platforms for designation and consulted (from January to March 2026) on a draft code of practice and draft guidance on prominence, accessibility and the statutory agreement objectives.

The Act has updated the regulatory framework for PSBs to make it more flexible. The Act provides greater freedom on how to fulfil the public service remit laid out in CA 2003. This has been done by updating certain quotas to include VOD as well as linear programming and streamlining purposes and objectives.

The Act introduces new rules for Channel 4 and imposes a new duty on the Channel 4 board to consider its long-term sustainability and secure its ability to meet costs, which must also be included in its annual report to be laid before Parliament. The Act also removes restrictions on Channel 4's involvement in content production – its current status as a "publisher-broadcaster" limits the channel to content from third parties, but the Act now allows Channel 4 to produce its own content in-house.

The Act also gives Ofcom new powers to regulate VOD (eg, Netflix, Amazon Prime or Disney+), including VOD providers that are based outside of the United Kingdom. This extends Ofcom's jurisdiction and could have significant impact on providers who will be regulated by both the European Union and the United Kingdom simultaneously. Ofcom may enforce a new code to regulate VOD services to the same standards as traditional linear broadcasting, to level the playing field between the two. The government has confirmed that services with more than 500,000 average monthly UK users will be designated as "Tier 1" VOD services under secondary legislation, with Ofcom progressing consultation work on a new VOD Standards Code and a VOD Accessibility Code as part of the Media Act rollout. Ofcom also has accompanying enforcement powers, which would enable them to impose fines of up to £250,000 or 5% of qualifying revenue worldwide.

In February 2024, Ofcom published its roadmap to regulation in relation to the Media Bill, which sets out its implementation plan of each part of the Act. In particular, the plan details proposed timeline for the implementation process for regulation in relation to public service television, listed events, Channel 4, VOD, radio services, and radio selection services.

The first related regulations were made on 15 August 2024, under the Media Act 2024 (Commencement No. 1) Regulations 2024. This marked the beginning of a staggered rollout, with Ofcom publishing ongoing consultation plans, updates, and implementation guidance over the next two years. These materials are available on Ofcom's website and will include codes, updates, and relevant reports.

OSA

The OSA was passed on 26 October 2023, with Ofcom as the designated regulator to enforce the Act in the United Kingdom. This imposes new duties around social media, online advertising, messaging and search services. Provisions include new communications offences and obligations to prevent fraudulent advertising as well as protections for news publisher content. Key illegal content duties have applied since March 2025 and child safety duties have applied since July 2025 (supported by Ofcom's issued codes of practice and associated guidance).

The majority of duties under the OSA continue to be implemented in phases. Ofcom's current published roadmap highlights the remaining "Phase 3" deliverables, including publication of the register of categorised services (expected in July 2026) and the subsequent rollout of transparency notices and reporting requirements for those categorised services.

Radio – future distribution

In February 2026, the DCMS launched a Radio Review (to be completed by the end of 2026) to examine future scenarios for UK radio and audio consumption into the 2030s and to consider, among other topics, whether there should be a managed transition away from FM in the 2030s, the impact of any future decision on DTT on radio distribution, and the role of emerging technologies including AI.

Law stated - 30 April 2026

REGULATORY AGENCIES AND COMPETITION LAW

Regulatory agencies

Which body or bodies regulate the communications and media sectors? Is the communications regulator separate from the broadcasting or antitrust regulator? Are there mechanisms to avoid conflicting jurisdiction? Is there a specific mechanism to ensure the consistent application of competition and sectoral regulation?

The Office of Communications (Ofcom) and the Competition and Markets Authority (CMA) have been the bodies responsible for the regulation of the media and communications sectors in the United Kingdom since 1 April 2014.

Ofcom

Aside from its regulatory functions, Ofcom also has competition law enforcement powers, which it holds concurrently with the CMA. These concurrently held powers allow the CMA

and sector-specific regulators in their respective areas to enforce the competition law prohibitions contained in the Competition Act 1998 (CA 1998). In Ofcom's case, these powers are limited to activities concerned with communications matters.

In the last year, Ofcom's regulatory remit has also been exercised more prominently in relation to online safety, as the independent regulator under the Online Safety Act 2023 (OSA), with core duties now in force and active compliance and enforcement activity underway.

The Communications Act 2003 (CA 2003) sets out Ofcom's principal duty of furthering citizen and consumer interests by regulating communications, protecting consumers from harm and by promoting competition. The Secretary of State retains some powers in certain circumstances, for instance, where a merger may raise public interest questions relating to the plurality of the media or if the Secretary of State considers it necessary to remove any concurrency functions.

Ofcom's "protecting consumers from harm" functions have also expanded in practice through implementation of the Media Act 2024, including new workstreams on connected TV prominence and accessibility and enhanced regulation of the largest video-on-demand services.

Ofcom's competition law powers cover the prohibitions against anti-competitive agreements and abuse of a dominant position. These powers are derived from CA 1998.

In addition to enforcing the competition law prohibitions, Ofcom also has investigative powers over markets by conducting market studies, with the ability to make references to the CMA for an in-depth market investigation, under EA 2002.

One of Ofcom's competition law functions under CA 2003 is to "further the interests of consumers in relevant markets, where appropriate by promoting competition". Both the Enterprise and Regulatory Reform Act 2013 (ERRA 2013) and the government's 2015 Strategic Steer encourage the concurrent regulatory authorities to coordinate in the exercise of their general competition powers, rather than their purely sector-specific regulatory powers. To facilitate this, ERRA 2013 encourages information-sharing between Ofcom, the CMA and the other regulatory bodies. The UK Competition Network and UK Regulator's Network provide the fora within which this coordination can take place such that cases may more effectively be resolved.

CMA

The CMA is the overarching UK competition regulatory body, coordinating competition policy and encouraging consistent enforcement between itself and the sector-specific regulators. The CMA's powers include the ability to act on a case after consultation with the sectoral regulators if the CMA believes that the case would be better tackled centrally, and the ability to withdraw a competition case from a sectoral regulator and progress the case itself.

The legal basis on which the concurrency regime is operated is set out in the Competition Act 1998 (Concurrency) Regulations 2014. Details of the relationship between Ofcom and the CMA concerning competition law can be found in the "Memorandum of understanding between the [CMA] and [Ofcom] – concurrent competition powers" (published on 2 February 2016). The memorandum sets out how the concurrency regulations are to be applied to the Ofcom–CMA relationship. Both will endeavour to reach an agreement as to which body will exercise its concurrent competition powers in any given case, which will include taking into

consideration the relative expertise and circumstances of the bodies. On an occasion where a decision is not adequately reached within two months, the CMA "must notify [Ofcom] that it intends to determine which [of the bodies] is to exercise" their concurrent powers. The concurrency regulations expressly prevent the possibility of "double jeopardy" (where two regulatory bodies review the same case simultaneously) and also provide for rules regarding case transfers between concurrent regulatory bodies.

A memorandum of understanding for regulatory coordination was published by the CMA in December 2024, setting out the arrangements by which the CMA and Ofcom will give effect to the provisions in Part 1 of the Digital Markets, Competition and Consumer Act 2024 (DMCCA 2024) with regard to regulatory cooperation.

In December 2024, the CMA also published its 10-year review of the competition concurrency arrangements in which it sets out its findings and recommendations. There are three areas where the CMA identified scope for improvement:

- the sector regulators' capacity for the exercise of their concurrent powers;
- the priority sector regulators give to Competition Act enforcement; and
- cooperation between sector regulators and the CMA on markets work.

Despite submissions by a minority of stakeholders that the concurrency regime leads to under-enforcement in certain sectors, the CMA is of the opinion that the concurrency model leads to more enforcement in regulated sectors overall compared to a model where the CMA alone exercises competition powers.

The CMA's most recent "Annual report on concurrency" (published on 30 May 2025) assesses how the concurrency regime has operated between 1 April 2024 and 31 March 2025. The report highlights the findings of the CMA's 10-year review set out above. It notes the UK government's issuance of a strategic steer to the CMA in May 2025, which situates the importance of an independent competition and consumer protection regime in the context of the UK's growth mission, setting an expectation that the CMA should work with other regulators to ensure regulatory action is coherent, timely and supportive of dynamic markets, growth and investment in the United Kingdom. The report additionally guides that the CMA is best placed to act where an intervention under the new DMCCA 2024 regime is likely to be the most effective route to delivering the desired outcome, and the issue is not squarely within scope of another UK regulator. The Department for Energy Security and Net Zero published its final report of its Ofgem Review on 22 April 2026, Ofgem being another of the sectoral regulators with concurrent powers. This has removed the stand-alone reference to promoting competition from Ofgem's statutory duties, in place since Ofgem was established, citing that a narrow focus on competition for its own sake has been shown not to work as needed in the context of energy consumers, although acknowledging that competition is, and must remain, inherent in an innovative and consumer-focussed market.

CMA panel

If it is reasonably believed that certain characteristics or conduct within a communications market may be harmful to competition, either Ofcom or the CMA board can bring a cross-market reference to the attention of an impartial CMA panel – consisting of members not involved with the initial investigations. This panel may then investigate (potentially through a phase 2 enquiry under EA 2002) and can decide whether it should take action

to mitigate, prevent or remedy any adverse competition effect or negative impact on consumers – including higher prices, lower quality, reduced variety of goods or services and stifled innovation. Alternatively, it may recommend another body take remedial action or can instead indicate what type of remedial action needs to take place to rectify any issues that are uncovered.

The UK government's update on its Regulation Action Plan, published in October 2025, indicated that the Department for Business and Trade (DBT) was consulting on proposals to replace the CMA's panel model for decision-making by replicating the Digital Markets Board Committee model (as provided for under DMCCA 2024) for both the CMA's mergers and markets functions. As above, the CMA panel currently acts as an impartial decision-maker, independent from the CMA board, in phase 2 market investigations, merger inquiries and regulatory references and appeals.

The DBT published a consultation in January 2026 proposing to replace panel-led inquiry groups with decision-making involving new sub-committees of the CMA board. An effect of this proposal would be to remove the independence of decision-making in phase 2 market investigations, merger enquiries and regulatory references and appeals, from the CMA board, which would remain responsible for deciding whether to refer a market for a phase 2 investigation. The consultation closed in March 2026; this proposal has not yet been confirmed.

Law stated - 30 April 2026

Appeal procedure
How can decisions of the regulators be challenged and on what bases?

CA 2003 and the Digital Economy Act 2017 (DEA 2017) outline the appeal mechanisms for Ofcom and CMA decisions concerning electronic communications networks (ECNs), electronic communication services (ECSs) and associated facilities (AFs). Also, CA 2003 offers appeal mechanisms to those wishing to appeal decisions relating to television and radio broadcasting.

ECN, ECS and AF appeal regime

Certain Ofcom decisions may be appealed to the Competition Appeal Tribunal (CAT) on judicial review grounds, namely: illegality, irrationality and unfairness. Decisions taken by the Secretary of State can also be appealed, including decisions concerning networks and spectrum functions, any restrictions or conditions set by regulators on electronic communications, a direction of Ofcom regarding its powers to suspend or restrict electronic communications, or a specific direction under the Secretary of State's powers under the Wireless Telegraphy Act 2006. Under the CAT Rules (2015), where an appeal is made concerning price control matters, the CAT must refer the case to the CMA. The CMA will then deliberate and decide on an outcome under CA 2003.

Schedule 8 of CA 2003 lists certain (more legislative) types of decisions by the CMA, Ofcom and Secretary of State that are not appealable to the CAT, but rather by way of judicial review to the Administrative Court. These include, inter alia, the instigation of any criminal or civil proceedings, decisions relating to administrative charges orders, the publication of the

UK Plan for Frequency Authorisation, recovery of sums payable to Ofcom, giving effect to regulations and imposing penalties.

Before the passage of DEA 2017, the process for appealing Ofcom's decisions was on the merits, permitting considerable new evidence and new parties to an appeal. DEA 2017 made substantial alterations to the way an appeal is brought under CA 2003 attempting to streamline the process of gathering evidence, including the cross-examination of witnesses and experts, and the general treatment of that evidence. The CAT must apply the same principles as would be applied by a court on an application for judicial review. The CAT may dismiss the appeal or quash the whole or part of the decision to which the appeal relates, remitting the matter back to the decision-maker with a direction to reconsider and make a new decision.

Television and radio broadcasting appeal regime

Owing to the changes enacted by DEA 2017, the appeals process for television and radio broadcasting-related decisions is similar to the ECN, ECS and AF appeal regime. Ofcom must have first complied with its powers under the Broadcasting Act 1996 (BA 1996) and have considered, before exercising its BA 1996 powers for competition purposes, whether there is a more appropriate way of proceeding under CA 1998 concerning some or all of the matters in question. A party affected by an Ofcom decision may appeal to the CAT only that part of the decision relating to Ofcom's competition powers under BA 1996. If a party wishes to appeal any other type of Ofcom decision, this must be done following standard judicial review procedures.

Television and radio broadcasting appeal regime

OSA creates a separate statutory appeal framework for certain Ofcom regulatory decisions, with appeals to the Upper Tribunal (including appeals by the provider of a service in relation to specified decision and, in certain cases, appeals by persons with a "sufficient interest" in Ofcom's decisions). In February 2026, the Tribunal Procedure Committee launched a consultation on proposed amendments to the Tribunal Procedure (Upper Tribunal) Rules 2008 to support these Online Safety Act appeal rights, including proposals on time limits and costs rules for OSA cases.

Law stated - 30 April 2026

Competition law developments

Describe the main competition law trends and key merger and antitrust decisions in the communications and media sectors in your jurisdiction over the past year.

Mergers

CMA annual merger investigation outcomes

The CMA cleared all 36 mergers it reviewed in 2025, marking the first year since 2017 in which no deals were blocked. The number of CMA interventions, where the CMA demands changes before a deal can close, also fell in 2025 with only six cases where deals were cleared to proceed subject to conditions.

CMA Merger Charter and updated remedies guidance

The CMA's willingness to clear the Vodafone/CK Hutchison joint venture in March 2025 by accepting novel remedies may have been the first sign of change of its approach to assessing remedies. This is also against the backdrop of the CMA coming under political pressure to support and contribute to the overriding national priority of the UK government – economic growth. This has been acknowledged in recent commentary including the CMA Strategy 2026 to 2029, published in November 2025, and underscored by the replacement of the CMA Chair in January 2025 with Doug Gurr, previously an Amazon executive, confirmed as permanent Chair for a five-year term in February 2026.

On 12 March 2025, the CMA published its Mergers Charter, which details principles that the CMA applies when engaging with businesses during a merger review, and what it expects from businesses in return.

On the same day, the CMA announced that it was seeking comments on its approach to merger remedies, specifically in relation to three areas, including:

- how the CMA approaches remedies;
- how remedies can be used to preserve pro-competitive effects of a merger; and
- how the process of assessing remedies can be made as quick and efficient as possible.

The CMA published draft revised merger remedies guidance in October 2025, together with a consultation on the guidance, and published its final updated merger remedies guidance in December 2025. The updated guidance is substantially different from the previous version, published in 2018. Particularly, it:

- provides further guidance on the CMA's approach to sequentially considering the effectiveness and proportionality of merger remedies;
- recognises that behavioural remedies, while regarded as secondary to structural remedies, can be effective, and sets out factors to reduce the risks of their use;
- assesses the effectiveness of carve-out and divestiture remedies; encourages the early appointment of experts to assist assessment of remedy proposals; and
- details the CMA's procedures for monitoring and reviewing remedies.

CMA merger efficiencies review

The CMA opened a call for evidence on its approach to the assessment of rivalry-enhancing efficiencies in mergers in January 2026, seeking views on:

- the CMA's analytical approach to rivalry-enhancing efficiencies, including the types of evidence considered and how dynamic efficiencies are assessed; and

- the CMA's process for assessing rivalry-enhancing efficiencies, including how merging parties on efficiency claims are engaged with.

The CMA will develop specific proposals for consultation in the spring, aiming to implement changes by summer 2026.

UK government Regulation Action Plan – progress update and next steps

In October 2025, the UK government published a progress update on its Regulation Action Plan, published in March 2025, including proposed reforms to the CMA's independent panel model for phase 2 decision-making. The reforms would replace the impartial panel with a sub-committee comprised of CMA board non-executive directors, executives and experts. This proposal replicates the Digital Markets Board Committee model in the context of the digital markets competition regime under the DMCCA. Decision makers on such a sub-committee would operate within the CMA's "4Ps" framework. An effect of this proposal would be to remove the independence of decision-making in phase 2 market investigations, merger inquiries and regulatory references and appeals, from the CMA board. The DBT additionally published a consultation in January 2026 echoing the proposal to replace CMA panel-led inquiry groups with decision-making involving new sub-committees of the CMA board. The consultation closed in March 2026; this proposal has not yet been confirmed.

The progress update to the Regulation Action Plan reaffirmed the UK government's commitment to consult on proposals designed to provide greater certainty with respect to whether transactions will be subject to CMA merger control jurisdiction. This includes legislative reforms to the "share of supply" and "material influence" tests. The "share of supply" and "material influence" tests have faced criticism for being overreaching and giving rise to uncertainty. In pursuit of the same aims, the DBT's January 2026 consultation also outlined the proposal to give the CMA discretion in determining whether to take forward market reviews when markets are referred for investigation by concurrent sector regulators.

Getty Images/Shutterstock

On 22 August 2025, the CMA launched a phase 1 investigation into the anticipated acquisition of by Getty Images Holdings, Inc of Shutterstock, Inc. The CMA's phase 1 findings suggested that the potential merger could lead to a substantial lessening of competition in relation to the supply of editorial content in the United Kingdom and stock content globally. The companies are close competitors in the editorial content and stock content markets, which the CMA found to have relatively high barriers to entry and expansion. Concerns arose that the merger may result in the merged entity being able to obtain more exclusive rights to the best positions at large events, and reduced customer choice, raising the risk of increased prices due to customers losing negotiation leverage.

On 3 November 2025, the CMA referred the anticipated transaction to a phase 2 investigation and on 19 February 2026 provisionally found competition concerns in respect of the supply of editorial content in the United Kingdom, but not in respect of the supply of stock content globally, as part of its in-depth investigation. The CMA published an invitation to comment on remedies in March 2026, which set out the remedies under consideration by the CMA to address the competition concerns identified in the provisional findings. These comprised the parties' own remedy proposal, Shutterstock's divestiture of Splash News and Backgrid,

a proposed wider divestiture, any other practicable remedies, and prohibition of the merger. The CMA has until 14 June 2026 to publish its final report and complete the investigation.

Daily Mail and General Trust plc/Telegraph Media Group

On 20 January 2026, the Secretary of State for Culture, Media and Sport announced she was "minded to" issue a Public Interest Intervention Notice (PIIN) regarding the proposed acquisition by Daily Mail and General Trust plc of Telegraph Media Group Holdings Limited. The PIIN was given on 12 February 2026, on the basis of there being reasonable grounds to suspect that the transaction may result in the creation of a relevant merger situation and there may be the following public interest considerations: the need for a sufficient plurality of views in news media; and the need for there to be a sufficient plurality of persons with control of the media enterprises.

Ofcom and the CMA are required to investigate and report to the Secretary of State, covering how the transaction may affect the public interest considerations outlined above, and whether the transaction may result in the creation of a relevant merger situation and, if so, whether the creation of that situation may be expected to result in a substantial lessening of competition, respectively. The PIIN requires the CMA's and Ofcom's reports to the Secretary of State by 10 June 2026.

Paramount/Warner Bros Discovery

On 13 April 2026, the CMA issued an invitation to comment on the proposed acquisition by Paramount Skydance Corporation of Warner Bros Discovery, Inc, the first stage in the CMA's information-gathering process. The invitation to comment closed on 27 April 2026.

The CMA has not yet launched a phase 1 investigation into the transaction.

Virgin Media O2/Daisy Group

On 12 May 2025, Virgin Media O2 and Daisy Group announced plans to merge their complementary direct business-to-business operations, and the merger, launching the combined business named O2 Daisy, officially launched in August 2025. As of April 2026, the business has rebranded to O2 Business. Virgin Media O2 holds a 70% stake, and Daisy Group holds a 30% stake, in O2 Business.

nexfibre/Netomnia

On 23 April 2026, the CMA opened an invitation to comment on the anticipated acquisition by Liberty Global, Telefónica and InfraVia, through their joint venture of nexfibre, of Substantial (including Netomnia, Brsk, Brsk ISP and YouFibre), the first stage in the CMA's information-gathering process. Liberty Global and Telefónica are the joint owners of Virgin Media O2 and, together with InfraVia, joint owners of nexfibre. The invitation to comment will close on 8 May 2026.

The CMA has not yet launched a phase 1 investigation into the transaction.

Axel Springer/Telegraph Media Group

On 14 April 2026, the Secretary of State for Culture, Media and Sport provided her written consent to the proposed sale by RB Investco Ltd of its call option to purchase Telegraph Media Group Holdings Ltd to Axel Springer. The Secretary of State assessed the proposed merger between Axel Springer and the Telegraph Media Group (TMG) under the public interest media mergers regime and the foreign state influence regime as set out in EA 2002, and was not minded to intervene under either regime.

The sale of TMG to Axel Springer follows RedBird Capital Partners withdrawing its £500 million bid to acquire ***The Daily Telegraph*** and ***The Sunday Telegraph*** in November 2025. The UK government intervened in the proposed deal due to the majority-funding by Abu Dhabi's IMI group, owned by the Abu Dhabi royal family, creating national security concerns under the foreign state influence regime as set out in EA 2002.

FTDI Holding Limited loses challenge to NSIA prohibition decision

The High Court of Justice handed down its judgment in the second challenge to a UK government decision under the National Security and Investment Act (NSIA 2021) in July 2025. Both cases in which a Final Order has been challenged have involved divestment orders imposed in respect of transactions that completed prior to the entry into force of the NSIA 2021.

On 6 November 2024, the Secretary of State made a Final Order requiring Chinese-owned FTDI Holding Limited to divest its 80.2% shareholding in FTDI, a Scottish semiconductor company, with FTDI Holding Limited subsequently bringing a judicial review challenge of the decision.

The Final Order held that there were two national security concerns requiring the divestiture: the deployment of UK-developed semiconductor technology and IP in ways contrary to UK national security; and the potential for FTDI Holding Limited's ownership to pose a risk to critical UK infrastructure that uses FTDI products.

The High Court ruled that FTDI Holding Limited must sell its stake in FTDI. The judgment held that, despite there being some procedural errors in the decision-making process, such as a failure to set out adequate reasons in the Final Order, these were not sufficient to invalidate the Final Order.

FTDI Holding Limited previously brought an application for interim relief against the Final Order, seeking an interim injunction suspending the divestment requirement of the Final Order, pending the determination of its judicial review proceedings challenging the decision. The High Court dismissed this application in February 2025. This was the first ever application for interim relief made against a final order under the NSIA 2021.

Markets

Inquiry into mobile browsers and cloud gaming

The CMA published its final report on mobile browsers and the cloud gaming market in March 2025, following its provisional report issued in November 2024. The report found that several mobile browser markets are not working well for consumers and businesses. Of particular

concern was Apple's policies on how mobile browsers work on Apple's devices. The inquiry group has confirmed its concerns in all areas but two found in the provisional report. Specific aspects of Apple and Google's choice architecture practices are no longer a concern after Apple released a software update to enable users to switch their default browser, and Google provided evidence relating to prompts used to encourage users to set Chrome as their default browser for Android.

On 22 October 2025, the CMA designated both Apple and Google with Strategic Market Status (SMS) in each of their mobile platforms, which cover operating systems, app distribution, browsers and browser engines on smartphones and tablets.

On 10 February 2026, the CMA announced that it had secured a package of commitments from Apple and Google aimed at delivering immediate improvements in certainty, transparency and fairness for UK app developers that rely on their app stores, following the firms' designation with SMS. The commitments require Apple and Google to review and rank apps in a fair, objective and transparent way, and to safeguard app data obtained through the review process so it is not used unfairly. The CMA will closely monitor implementation, with Apple and Google required to report metrics on app review outcomes, timing, complaints and interoperability requests. The commitments are effective from 1 April 2026.

Google designated with SMS in search and search advertising

The first probe under the digital markets competition regime sought to establish whether Google has SMS in search and search advertising activities and whether these services are delivering good outcomes for people and businesses in the United Kingdom. The CMA published an invitation to comment on 14 January 2025, setting out the scope of its initial SMS investigation and held a series of roundtable events for groups of stakeholders to explore the issues and hear their views.. The final decision designating Google with SMS in general search services was published on 10 October 2025.

In January and February 2026, the CMA launched a consultation and hosted stakeholder roundtables on conduct requirements for Google's general search and search advertising services. The final conduct requirements are yet to be published.

CMA investigating SMS in mobile ecosystems

In January 2025, the CMA launched an SMS investigation into Apple and Google in relation to their mobile ecosystems. The regulator will assess the impact on people who use mobile devices and on businesses that develop services or content such as apps for them. The CMA will explore the extent of competition between Apple's and Google's mobile ecosystems and plans to assess the potential barriers that are preventing other competitors from offering rival products and services on Apple's and Google's platforms. The investigation will also encompass any potential exploitative conduct, such as whether Apple or Google are requiring app developers to sign up to unfair terms and conditions to distribute their apps on Apple's and Google's app stores, or whether users are presented with architecture that makes it difficult to make active choices about the apps on their devices.

On 22 October 2025, the CMA designed both Apple and Google with SMS in each of their mobile platforms, which cover operating systems, app distribution, browsers and browser engines on smartphones and tablets.

On 10 February 2026, the CMA announced that it had secured a package of commitments from Apple and Google aimed at delivering immediate improvements in certainty, transparency and fairness for UK app developers that rely on their app stores, following the firms' designation with SMS. The commitments require Apple and Google to review and rank apps in a fair, objective and transparent way, and to safeguard app data obtained through the review process so it is not used unfairly. The CMA will closely monitor implementation, with Apple and Google required to report metrics on app review outcomes, timing, complaints and interoperability requests. The commitments are effective from 1 April 2026.

Meta compliance with requirements imposed under information request notices investigation

On 23 January 2026, Ofcom opened in investigation into Meta Platforms Inc concerning its compliance with requirements under information request notices requiring the provision of information to inform Ofcom's market monitoring of the retail business messaging market and subsequent Wholesale A2P SMS Termination Market Review. The notices requested a range of data concerning Meta's WhatsApp Business. Ofcom notes that available evidence suggests that Meta may not have complied with certain requirements, in that some of the information provided by Meta in response to the notices may not have been complete and accurate. The investigation is ongoing, and further updates will be provided as more information is gathered.

Cloud services market investigation

On 5 October 2023, Ofcom referred the UK cloud services market to the CMA for an in-depth examination following its market study in October 2022 that identified certain features and practices that hinder customer switching and the use of multiple cloud suppliers. The investigation has revealed that Amazon Web Services and Microsoft are the leading cloud infrastructure providers in the United Kingdom, with Google as their closest competitor. While competition has brought benefits such as innovative products and discounts, certain aspects of the market raised concerns.

To address Ofcom's concerns the CMA's investigation was based on the three market features that Ofcom expressed the most concern about, along with the potential impact of software licensing practices on cloud competition. The CMA's investigation scrutinised whether technical barriers and egress fees hinder customers from switching providers or using multiple cloud services, and whether these factors contribute to customer lock-in and impede competition. Additionally, it examined whether the discount structures of existing providers obstruct market entry and expansion, and whether software licensing practices discourage the use of rival cloud providers.

The CMA published its provisional report on cloud infrastructure services in January 2025 and its final report in July 2025, and found that there are "as-efficient competitors" arising from certain features in the cloud services markets in the United Kingdom, and proposed remedies to address the harms to competition that have been identified such as switching costs and barriers to entry for new providers. The proposed remedies focus on appropriately designating SMS when applicable to allow the CMA to take targeted interventions to address competition concerns in the cloud services market.

In March 2026, Microsoft and Amazon made announcements outlining steps the companies will take to address interoperability and cloud egress fees for UK customers, following the findings of the CMA's market investigation into cloud services and ongoing engagement with the CMA. The CMA will continue active engagement with Microsoft and Amazon to ensure the steps announced by the companies benefit UK customers.

At the same time, the CMA announced that it will launch an SMS investigation into Microsoft's business software ecosystem, commencing in May 2026. An SMS designation would allow the CMA to act on a major concern from its cloud market investigation, that Microsoft's use of software licensing reduces competition in cloud, and would provide a route to ensuring a level playing field among providers at a time when innovation in AI is reshaping competition in productivity software.

Consumer protection enforcement investigations

In November 2025, the CMA announced that it had opened investigations into eight businesses that it has reason to suspect have infringed consumer law in relation to their use of fees, use of misleading time-limited offers or the practice of automatically opting consumers in for optional charges, or both, under DMCCA 2024. This follows the CMA's major cross-economy review of more than 400 businesses to assess compliance with the rules on price transparency. The investigations are the first enforcement cases opened using the CMA's new powers under DMCCA 2024.

The eight businesses are StubHub, viagogo, AA Driving School, BSM Driving School, Gold's Gym, Wayfair, Marks Electrical and Appliances Direct. StubHub and viagogo are being investigated over mandatory additional charges applied when consumers buy tickets; AA Driving School and BSM Driving School are under review for their presentation of mandatory fees on their websites. Gold's Gym is being investigated over its presentation of a one-off joining fee for its annual membership, and Wayfair, Appliances Direct, and Marks Electrical are being investigated to determine whether their time-limited sales ended when they said they would.

The CMA will engage with the businesses and gather evidence to consider whether the companies have infringed consumer protection law.

Fake and misleading reviews investigations

The CMA launched investigations in March 2026 into the handling of online reviews and star ratings by Autotrader, Feefo, Dignity, Just Eat and Pasta Evangelists. The investigations have been launched under DMCCA 2024, which classes several practices relating to online reviews as "banned practices", including undisclosed paid-for reviews, fake reviews and the hiding of negative feedback.

The CMA is examining:

- whether Autotrader and Feefo failed to publish or count certain 1-star reviews, potentially inflating star ratings;
- whether Dignity asked staff to post positive reviews of its crematoria services, giving a misleading impression of genuine customer feedback;
-

whether Just Eat's ratings system has artificially boosted some restaurants' and grocers' star ratings; and

- whether Pasta Evangelists offered discounts in exchange for 5-star reviews on delivery apps without clearly disclosing that those reviews were incentivised.

The CMA will engage with the businesses and gather evidence to consider whether the companies have infringed consumer protection law.

Ofcom's Telecoms Access Review 2026

In March 2024, Ofcom initiated a review of the regulations set to govern the UK's wholesale telecoms markets from April 2026 to March 2031. The review was designed to ensure that the UK's broadband infrastructure is future-ready, fostering competition and investment in gigabit-capable broadband to enhance services and consumer choice. Since the previous review in 2021, Openreach and several other companies have accelerated the deployment of their next-generation networks.

Ofcom released its final decisions on 17 March 2026, applicable from 1 April 2026, concluding that BT has significant market power in a number of markets, and so Ofcom is imposing conditions as required by Part 2 of CA 2003 to address the resulting competition concerns of BT's significant market power. This framework continues Ofcom's previous approach of regulating wholesale broadband and leased lines differently in different parts of the United Kingdom to reflect the level of current or prospective competition. With Ofcom's remedies from Telecoms Access Review in place, it expects competition from new providers to continue to develop.

Antitrustand litigation

UK Supreme Court judgment handed down on approach to opt-in versus opt-out competition collective actions

In December 2025, the UK Supreme Court handed down its judgment in ***Evans v Barclays Bank Plc***, an important decision on when competition collective proceedings should be brought on an opt-in or opt-out basis. In opt-in collective proceedings, potential claimants must actively sign up to be part of the class. In opt-out proceedings, all persons within the defined class are automatically included unless they take steps to opt out. Opt-out proceedings therefore tend to produce much larger classes and higher aggregate claim values.

Phillip Evans filed an application to the CAT in December 2019 to commence collective proceedings against Barclays, Citibank, JP Morgan, NatWest, RBS and UBS. The follow-on claims for damages stemmed from two European Commission decisions adopted in May 2019, concerning the exchange of commercially sensitive information about trading activities in relation to foreign exchange spot trading, and coordination of trading activities through private chatrooms, found to constitute a single and continuous infringement of article 101 of the Treaty on the Functioning of the European Union and article 53 of the EEA Agreement (the Application).

In March 2022, the CAT held that the claim could proceed only on an opt-in basis. In November 2023, the Court of Appeal overturned the CAT's decision and held that the claim

could proceed on an opt-out basis, remitting the case to the CAT for case management. The banks then appealed to the Supreme Court.

The Supreme Court allowed the appeal and reinstated the CAT's original decision to refuse an opt-out compulsory purchase order (CPO). It confirmed that the relative weakness of the claim, as assessed by the CAT, was a factor that could properly weigh strongly against opt-out proceedings. It also held that the CAT was entitled to take into account that many large, sophisticated financial institutions – who stood to recover substantial sums if the claim succeeded – were not interested in opting in, and although smaller entities and individuals might in practice find it difficult to opt in, the CAT could still conclude that, looking at the class as a whole, it was not impracticable to bring opt-in proceedings.

The Supreme Court further held that the policy of facilitating access to justice and deterring infringements does not create a presumption in favour of opt-out proceedings. The CAT should start from a position of neutrality, with no default in favour of either opt-in or opt-out, and decide between them based on the statutory criteria and the facts of the case. The judgment confirms that opt-out collective proceedings are not the norm in competition damages claims and that the CAT has a wide margin of discretion in choosing the appropriate mechanism. Several other collective actions currently proceeding on an opt-out basis are now being appealed/reviewed in light of this decision.

Class action against Vodafone, EE, Three, and O2 over alleged abusive out-of-contract pricing

In December 2023, Justin Gutmann filed an application at the CAT to commence class action proceedings against the UK's four mobile network operators – Three, Vodafone, EE and O2/Telefónica. The class representative alleges that these operators exploited their market dominance by overcharging customers who did not terminate their handset and airtime services contracts after their minimum terms expired. The claim, representing millions of customers, seeks approximately £3 billion in damages for the alleged abusive out-of-contract pricing. In March 2025, Three, Vodafone, EE, and O2 attempted to have the claim thrown out, arguing that the lawsuit is fundamentally flawed, alongside the CPO hearing. The judgment on the CPO hearing was handed down in November 2025, granting CPO Applications in all four proceedings, striking out claims for losses arising before 1 October 2015 for being time-barred as per the first of the defendants' applications for strike-out, but refusing an application by Vodafone, EE and Three for further strike-out of claims for losses that arose between 1 October 2015 and 8 March 2017. The CAT refused the further strike-out application as limitation turned on fact-sensitive issues that the CAT found could not be fairly decided without disclosure. There is a case-management conference (CMC) listed for 1 July 2026. No trial date has yet been listed.

CMA objects to Google's ad-tech practices

The CMA published a statement on 6 September 2024 announcing that it had issued a series of objections alleging that Google has abused its dominance in online display advertising to favour its own ad-tech services.

The CMA's provisional findings relate to the way in which Google "self-preferences" its own ad exchange when a page is loading, which harms competition and, as a result, the performance of advertisers and publishers on Google's platforms and services. The CMA

alleges that, during the series of auctions and transactions that take place to determine which advertisements are shown to the user, Google has been "preferring" its own ad exchange, AdX, to prevent competition from other ad exchanges.

The CMA has considered representations from Google, and is considering next steps whilst monitoring international developments.

Relatedly, the CMA published its decision to release commitments it previously accepted in respect of Google's Privacy Sandbox Proposals (PSPs) in October 2025. The Privacy Sandbox is a set of proposed changes to Google's web browser (Chrome) that was intended to limit cross-site tracking by replacing third-party cookies (TPCs) with alternative technologies. TPCs are a fundamental building block to support the effectiveness of advertising services offered by publishers and ad techs that compete with Google. The CMA was concerned that without scrutiny and oversight, the PSPs would allow Google to self-preference its own ad inventory and ad-tech services. The CMA accepted commitments from Google to ensure that Google's Privacy Sandbox was developed in a way that did not distort competition in online advertising markets, however, since the CMA accepted its commitments, Google has changed its approach to the Privacy Sandbox, and particularly, in July 2024, Google announced that it would no longer remove TPCs from Chrome. The CMA concluded that it therefore has reasonable grounds for believing that its competition concerns no longer arise, and so released the commitments.

Apple UK class actions on App Store fees, iCloud service and Apple Pay

In October 2024, a £785 million class action in the United Kingdom targeting Apple over its App Store fees was cleared for trial, following a ruling from the CAT. The class representative, Sean Ennis, alleged that the tech giant has been abusing its dominant market position by overcharging UK-based app developers, while Apple argued that an aggregate award of damages would be unsuitable given certain proposed class members and developers actually benefit from Apple's alleged conduct. A CMC took place on 14 April 2025, and a hearing took place on 22 April 2026 to consider Apple's application to decertify the proceedings on the grounds that the conditions for certification on an opt-out basis are not met, in light of the judgment of the UK Supreme Court of 18 December 2025 in ***Evans v Barclays Bank Plc***. No judgment has yet been handed down. A further CMC is listed for 6 May 2026.

In April 2026, a collective proceedings action submitted by consumer group ***Which?*** against Apple, relating to alleged anti-competitive conduct in its iCloud service in December 2024, was cleared for trial. The approximately £3 billion claim alleges that Apple abused competition rules by locking millions of consumers into its iCloud service at excessive prices, making it difficult for them to use alternative providers and forcing them to pay more than they would have paid under competitive conditions. Apple applied to strike out the claim, on the grounds that the non-paying users' claim is, in substance, a claim that depends on each consumer's subjective valuation of iCloud, and that such loss is not recognised under English law because there is no change in the claimant's asset position, even when advanced on a class-wide basis. The strike-out hearing took place in March 2026, and the judgment has yet to be handed down.

In January 2026, an application to commence collective proceedings on an opt-out basis was made to the CAT by James Daley Class Representative LLP against Apple, relating to Apple's

alleged abuse of its dominant position by refusing to supply third parties with access to near field communication input and or favouring its own services to preclude competition in issuer and consumer mobile wallet services, and tying mobile wallet services to digital wallet services. The claim alleges that, as a result, Apple has been able to impose higher Apple Pay fees on issuers, and the overcharge has been passed on, in full or in part, to customers of consumer finance products. The claim's value is estimated as up to £1.5 billion.

Class action launched against Amazon over Amazon Marketplace

On 14 August 2025, the CAT received an application from the Association of Consumer Support Organisations Ltd to commence collective proceedings on an opt-out basis against Amazon. The claim, worth up to £7.5 billion, alleges that Amazon has abused its dominant position in the market for online marketplace services provided to third-party retailers in the United Kingdom through its price parity policies. The price parity policies allegedly prevent or strongly discourage third-party sellers from offering lower prices for their products on other e-commerce platforms and their own websites, unlawfully protecting Amazon from price competition from other e-commerce platforms. Amazon applied to strike out the proceedings, however, the CAT handed down its judgment refusing Amazon's application in March 2026.

UK and EU sign Competition Cooperation Agreement

In February 2026, the UK government and the European Union signed the UK-EU Competition Cooperation Agreement (CCA), which is the first supplementary agreement to the overarching UK-EU Trade and Cooperation Agreement. The CCA allows for greater dialogue and more rigorous enforcement of antitrust issues between the CMA, and the European Commission, particularly on similar or parallel cases.

There are concerns that the CCA does not go far enough on the UK side as it only covers the CMA and not other regulators, for example, Ofcom.

The CCA will enter into force once both sides complete their respective ratification procedures.

Meta class action on user personal data

In November 2024, the Court of Appeal handed down a judgment denying Meta leave to appeal a circa £2.3 billion data access class action brought by class representative Dr Liza Lovdahl Gormsen, following a February 2024 judgment in the CAT. The opt-out action alleges that Meta exploited UK Facebook users' personal data outside of the platform in an "unfair bargain", on the basis that users had no choice but to submit to Meta's collection and processing of their information for the company's ad profit because of its market dominance in social networking. The current class is all UK Facebook users who accessed their Facebook account between 14 February 2016 and 6 October 2023 while in the United Kingdom.

In September 2025, the CAT handed down a judgment permitting the class representative to amend her claim form to introduce a new head of damage, for "user damages". Meta applied to appeal this decision, but the CAT refused its application in October 2025. Several CMCs

have since taken place to consider issues relating to disclosure, including a CMC in relation to factual and expert evidence on 20 April 2026. No trial date has yet been listed.

Microsoft UK class actions on cloud fees and perpetual licences

Microsoft is facing a £1 billion class action in the United Kingdom over how it charges customers who buy cloud software services that rival its own Azure platform. The class action, which was announced in December 2024, alleges that Microsoft is abusing its dominance in computer operating systems and unfairly overcharging business customers if they purchase its Windows Server and use it with the cloud platforms of Microsoft's main rivals, including Amazon, Google and Alibaba.

A CMC was listed on 10 June 2025 but was vacated by consent. The parties agreed directions to the CPO Hearing, which was heard in December 2025, with judgment yet to be handed down.

The CAT published a Consent Order in January 2026, requesting that the parties file and exchange written submissions addressing the potential impact of the UK Supreme Court's judgment in ***Evans v Barclays Bank Plc*** in relation to the issue of opt-in versus opt-out proceedings.

Microsoft is additionally facing a UK class action valued at up to £3.5 billion, brought by Alexander Wolfson as class representative. The claim alleges that Microsoft is abusing its dominance in one or more of the markets for personal computer operating systems, personal computer productivity suites and or Microsoft client access licences, with the purpose or effect of limiting the number of pre-owned perpetual licences for certain versions and editions of Windows, Office and client access licences.

The collective proceedings claim form was filed with the CAT in May 2025. Microsoft has since written to the CAT to indicate its intention to file a challenge to the CAT's jurisdiction to determine non-competition law issues that arise in the proposed collective proceedings.

CMA issues first fine using new fining powers under DMCCA 2024

The CMA issued its first fine using powers granted by DMCCA 2024 for when businesses fail to comply with legal requests for information. A penalty of £473,000 was imposed on Euro Car Parks in December 2025.

The CMA issued Euro Car Parks with an information notice in July 2025, and despite seven separate attempts to secure a response, Euro Car Parks failed to respond to the notice for three months. Euro Car Parks stated that it had blocked the CMA's emails, believing they were an attempt to scam the firm, but the CMA did not consider this to be a reasonable excuse and proceeded to impose the fine. Under its enforcement powers, the CMA can issue a fixed penalty of up to 1% of a company's annual turnover for this type of breach.

The CMA is in the process of analysing the information it has obtained to determine whether a case should be launched.

Regulatory

Digital Regulation Cooperation Forum

In July 2020, the CMA, Ofcom and the Information Commissioner's Office (ICO) established the Digital Regulation Cooperation Forum (DRCF) to deliver a step-change in coordination and cooperation between regulators in digital markets. The Financial Conduct Authority – initially an observer member – joined as a full member in April 2021. The DRCF is a non-statutory voluntary network – it does not have a decision-making role and does not provide formal advice or direction to members. Rather, the forum aims to achieve coherent, informed and responsive regulation of the UK digital economy; specifically, the organisations believe that the challenges posed by the regulation of online platforms require a greater level of regulatory cooperation.

On 27 April 2023, the DRCF published its key outputs across the period 2022-23. It highlighted the CMA-Ofcom joint statement on "Online safety and competition in digital markets", the publishing of the DRCF Terms of Reference, and the ICO-Ofcom joint statement on interaction between "Online safety and data protection regimes".

The DRCF also published its 2024/25 Workplan, which set out the organisation's strategic vision for the following three years. The 2025/26 Workplan, published in April 2025, sets out how the three-year vision is being implemented currently. This vision is steering the long-term aims of the DRCF's annual work package and the plans it is developing and delivering for the years 2025-26 and 2026-27. The key areas of focus in the DRCF's three-year vision include protecting and empowering people online, unlocking digital innovation and economic growth, supporting regulator effectiveness, leading domestic and international discussions, and anticipating future developments.

The DMCCA

The DMCCA came into force on 1 January 2025 and became effective on 6 April 2025 after receiving Royal Assent in May 2024. The DMCCA is a piece of UK legislation that aims to promote free and fair competition among businesses, both online and offline, while also protecting consumers from unfair practices. There are three primary areas of focus for the legislation.

First is consumer protection. The Act empowers the CMA to take enforcement action against businesses that use unfair practices to deceive consumers, such as fake reviews, subscription traps, and pressure selling. It also allows the CMA to determine when consumer law has been violated, rather than having to take each case to court, which speeds up the process of protecting consumers and ensuring that fair-dealing businesses are not at a disadvantage. The Act also includes provisions that allow the CMA to fine businesses that break the law up to 10% of their global turnover.

The second is digital markets. The Act established a new regime overseen by the Digital Markets Unit (DMU) within the CMA, which is designed to hold digital firms accountable for their actions and prevent firms with SMS from using their size and power to limit digital innovation or market access. The DMU uses a proportionate approach to regulate digital firms, enabling all businesses to compete fairly in digital markets.

In January 2024, the CMA published an overview of the CMA's provisional approach to implement the new Digital Markets competition regime as proposed by the DMCCA. This regime is only applicable to firms identified by the CMA as having SMS in one or more digital activities, after a thorough investigation and public consultation. If a firm is found to be

exploiting its SMS, the CMA will intervene with targeted actions. These actions may include imposing conduct requirements, such as preventing SMS firms from favouring their own products, requiring them to allow interoperability with other firms' products, or mandating increased transparency in their algorithms.

Finally, the DMCCA aims to promote competition in the economy more broadly. It gives the CMA stronger investigative and enforcement powers, which allows it to conduct faster and more flexible competition investigations and identify and stop unlawful anticompetitive conduct more quickly.

The DMCCA introduced amendments to EA 2002 to restrict foreign state ownership of UK newspapers. These amendments aim to prevent the influence or control over UK newspaper enterprises. To trigger intervention, the Secretary of State must have a reason to believe that a merger would lead to foreign state control or influence. If this is the case, then a "foreign state intervention notice" will have to be issued to the CMA.

In the first 15 months since the DMCCA's implementation, the CMA has launched investigations against 14 businesses under its new consumer powers, designated two businesses with SMS in respect of three activities, imposed its first fine using its new powers, and has been served with a PIIN and is correspondingly investigating an anticipated acquisition of a UK newspaper business.

The DMU has responded to the SMS designations above by consulting on conduct requirements for Google and Apple and has secured various commitments by the companies to address many of the issues identified as of highest priority.

Consultation response on NARs 2021

On 12 March 2026, the Cabinet Office published its response to the consultation on its proposed amendments to the National Security and Investment Act 2021 (Notifiable Acquisition) (Specification of Qualifying Entities) Regulations 2021 (NARs 2021), aimed at reducing low-risk notifications while maintaining protection against emerging technology-related threats.

The Cabinet Office confirmed that it will:

- carve out separate Critical Minerals and Semiconductors schedules from the Advanced Materials schedule;
- incorporate activities covered by the Computer Hardware schedule into the new Semiconductors schedule;
- add a new Water schedule; and
- make targeted amendments to other schedules.

The amendments include narrowing the scope of mandatory notification in the Artificial Intelligence schedule.

In particular, the Cabinet Office will revise the Artificial Intelligence schedule so that the use of "off-the-shelf" or licensed third-party AI systems for routine business activities is excluded from mandatory notification, and will also exclude certain minor modifications and testing carried out as part of normal deployment and IT policies.

The Cabinet Office signalled that it will publish further guidance to clarify the scope and definitions of the new and amended schedules.

Law stated - 30 April 2026