



Department for
Digital, Culture,
Media & Sport

Rt Hon Oliver Dowden CBE MP
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Dame Melanie Dawes
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Dear Melanie,

On 24 June, the Government announced its intention to develop a long-term vision for the development, deployment and adoption of wireless networks in the UK. We are at a critical juncture in the development of future wireless networks, and our Wireless Infrastructure Strategy will set out a policy framework to ensure that, by 2030, advanced wireless infrastructure is an integral part of the fabric of the UK's economy and society and making a significant contribution to the Government's growth and levelling up agendas.

I welcome Ofcom's launch of its strategic review of the mobile market, and the work you are undertaking to develop your Spectrum Roadmap and Spectrum Management Strategy. Both Government and Ofcom have a role to play in ensuring that the UK continues to reap the maximum benefits from competition and innovation in the market. The Government will set a clear policy direction through its Wireless Infrastructure Strategy, including in relation to any necessary changes to the regulatory framework to support those ambitions.

To support this work, I would be grateful if Ofcom could provide evidence and analysis on the following areas.

- 1. Future wireless connectivity needs** - Ofcom's assessment of the potential level of service that may need to be provided to meet the needs and expectations of consumers, businesses and sectors by 2030 in terms of speed, reliability and latency.
- 2. Market Developments** - Ofcom's assessment of the changes and trends impacting the UK mobile market, the impact these changes are likely to have on competition in the market and investment in new technologies.

These might include, for example: changes in the MVNO market; the growth of over the top services; network convergence; the emergence of new players such as neutral host providers, hyperscalers, systems integrators / private network operators, localised MNOs; and changes to network design such as softwarisation and open networks.

- 3. Spectrum** - given the criticality of spectrum to future wireless networks:
- a. Ofcom's assessment of whether the UK spectrum management framework will remain fit for purpose to enable the best outcomes for the UK, and any changes to the framework that may need to be considered, given the emerging and anticipated changes in the MNO and private network markets, networks, technology and industry ecosystem.
 - b. Ofcom's preliminary assessment of the potential spectrum requirements over the coming 15 years for mobile networks and how, in terms of spectrum bands and mechanisms, these might be accommodated.
 - c. Efficient use of spectrum: Ofcom's assessment of whether there is scope to improve the effectiveness of spectrum use in existing licensed spectrum holdings, and Ofcom's assessment of the options to do this. Ofcom's assessment of what new technological capabilities and innovations can be used to improve and modernise spectrum access and licensing, and Ofcom's plans for implementing these.

It would be helpful for Ofcom to provide your current assessment on future connectivity needs by the end of December and an initial assessment of the market developments and spectrum questions by end of January 2022, with the opportunity to provide updated assessments in 2022.

I look forward to working with you as this work develops, and I know the team here is looking forward to a collaborative and open approach to this work with Ofcom.

Yours sincerely,



Rt Hon Oliver Dowden CBE MP
Secretary of State for Digital, Culture, Media and Sport