

The Last *Dial Tone*

Britain switches off its analogue phone network on 31 January 2027. This is the complete, evidence-graded picture: what actually happens, who is genuinely at risk, and one accountable forecast of how it ends, built on 47 cited sources.

By **Dr Alex J. Martin-Smith** CMgr MBA LLM DBA · Reviewed by **Adrian James** · BroadbandSwitch.uk



The verdict, *weighted*



Probabilities published 12 June 2026 · marking scheme on page 26 · scored in public, February 2027

INDEPENDENT

EVIDENCE-GRADED

SCORED IN PUBLIC

About this report

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Important notices

Point in time. Published 16 June 2026. All data, prices, dates and product details were checked to 13 June 2026 and may change. Verify current details with your provider before acting.

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My hypothesis, stated before the evidence

Most coverage of the switch-off asks the wrong question. "Will it be delayed again?" invites a yes or a no. The evidence points somewhere more interesting.

On 31 January 2027, Britain's Public Switched Telephone Network is scheduled to retire. The date has slipped once already, from December 2025, after failures during migration put vulnerable telecare users at risk and, in two reported cases on one provider's network, contributed to deaths. So the instinct to ask whether it will slip again is understandable. It is also, I believe, the wrong frame.

My hypothesis, stated plainly so it can be marked against events: **the headline date will hold, but completion will be achieved partly on paper.** A residual tail of lines, our modelling suggests somewhere between 150,000 and 450,000, will not be migrated in time. Instead they will be caught by transitional products that BT and Openreach have quietly pre-built for exactly this purpose: an emergency-calls-only line called EVAc, and analogue-style stopgaps known as PDPL and SOTAP that run to around 2030. The platform retires on schedule. A minority keeps a dial tone through the side door. That is a soft landing, not a clean finish, and not a delay.

Why lean this way? Three reasons run through this report. First, the network is failing in plain sight: it

consumes around 1% of British energy usage, suffered more than 2,600 major incidents in a single year, and runs on parts nobody manufactures any more. Second, the date is a commercial decision, not a law, and the government has said it will not legislate a pause. Third, and decisively, the escape hatch already exists. The argument that forced the 2023 pause, that vulnerable people would be cut off, has been structurally defused by products designed to make sure nobody is.

We put the probability of this soft landing at 72%, a formal further delay at 23%, and a genuinely clean completion at just 5%. Part Three shows the working, and page 26 publishes the exact criteria by which we will score ourselves after the event. Authority is cheap to claim and expensive to demonstrate. We have chosen the expensive route.

If you read only one section, make it the briefing written for you: the regulator and industry reader starts on page 28, the business and care reader on page 34, and every UK household on page 40.



Dr Alex J. Martin-Smith

CMgr MBA LLM DBA · Founder, BroadbandSwitch.uk · Isle of Man, June 2026 · [linkedin.com/in/alexmartinsmith](https://www.linkedin.com/in/alexmartinsmith) · Reviewed by Adrian James

Dated figures. Named sources. Marked predictions. That is the whole method.

Eight months out: the state of the switch-off *on one page*

The scale and the gap. From a base above 16 million lines, roughly 1.9 million remained on 11 June 2026,^[29] several hundred thousand of them business premises. Lines are leaving at about 44,000 a week against the roughly 52,000 the deadline requires.^[30] Sustained since January, that arithmetic leaves a six-figure residual standing on 31 January 2027, and Openreach concedes reaching zero is unlikely: the final stretch is made of customers who do not want to move and equipment that resists moving.^[29]

The forcing functions. The retiring network consumes around 1% of British electricity,^[29] suffered more than 2,600 major incidents in a single year,^[21] and runs on parts no longer made. Legacy wholesale prices double across 2026, free voice-only migrations run to 31 October,^[27] and the modern line is already cheaper.^[23]

The safety net. Unmigrated voice lines will not go dead. There is no big bang: a gating process moves stragglers onto Emergency Voice Access, keeping calls and 999 alive, while analogue-style stopgaps run to December 2030.^[26] The genuine hard edge is ISDN, the business lines that cease on 1 February 2027 with no migration path at all.^[29]

The risk that remains. The first delay was bought with harm: telecare failures including two reported deaths on one provider's network,^[16] later fined £23.8 million.^[37] Around 1.8 million people rely on telecare,^[10] devices still fail over digital lines at measurable rates,^[44] and the final-quarter acceleration squeezes that cohort hardest. A serious incident is the one event that could move the date.

The verdict. Weighing the arithmetic, the lifeboat and the base rates from every comparable national migration: 72% the date holds with a managed tail, 23% formal delay, 5% clean completion, with a central residual of 150,000 to 450,000 lines. Part Three shows the working; page 26 publishes the marking scheme.

1.9m

lines still on the legacy network, 11 June 2026, from a 16m+ base^[29]

44k v 52k

actual weekly migrations against the required pace^[30]

£42m+

Ofcom penalties across four migration and resilience enforcement actions^{[32][34][35][37]}

1.8m

people relying on telecare alarms across the UK^[10]

~1%

of British energy consumed by the dying network^[29]

150-450k

our modelled residual on the morning of 1 February 2027

The whole report in one sentence

The old phone network retires on time, almost nobody gets cut off, a few hundred thousand lines land in a pre-built lifeboat, and the only thing that could change that script is a serious safety failure between now and January.

5% clean completion

72%

23%

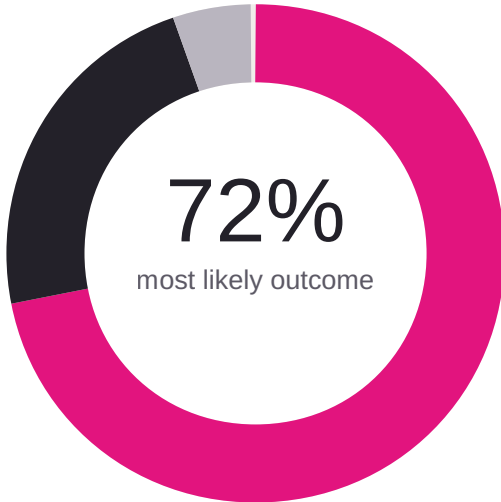
The date holds, with a managed residual tail

Formal delay

Probabilities published 12 June 2026 · marking scheme on page 26 · scored in public, February 2027

WHAT CHANGES NEXT	1 JULY 2026	3 AUGUST 2026	31 OCTOBER 2026	31 JANUARY 2027
The milestone	Legacy wholesale rental rises another 40% ^[23]	EVAc lifeboat pilots begin, Salisbury and Mildenhall ^[26]	Free voice-only migration window closes; our October decision point ^[27]	WLR withdrawn; ISDN ceases outright the next day ^[29]
What to watch	Whether price finally moves the laggards	Whether the lifeboat proves seaworthy	Residual below half a million confirms our 72%	Measure the tail, not the binary: page 32

Three futures, weighted



72% · The date holds, with a managed tail

Platform retires on or around 31 January 2027. A residual of roughly 150,000 to 450,000 lines is absorbed by EVAc, PDPL, SOTAP and surviving unbundled lines rather than fully migrated.

23% · A formal further delay

BT and Openreach publicly announce a third national date. Most plausible trigger: a serious telecare incident during the late-2026 acceleration, echoing the December 2023 pause.

5% · A genuinely clean completion

Effectively zero residual and no lifeboat reliance at national scale. Arithmetically implausible at current run rates, and without precedent internationally.

Probabilities: BroadbandSwitch.uk editorial model, June 2026. Method and resolution criteria: Part Three. Line data: Openreach via ISPReview (11 June 2026); required run rate: OTA (January 2026).



PLAIN ENGLISH

Why publish percentages at all?

Because vague predictions can never be wrong, and never being wrong is how you spot analysis that was never serious. We publish numbers, and on page 26 we publish the marking scheme. After 31 January 2027, you can grade us.

16m+ to 1.9m

the journey so far, base to remaining lines, June 2026^[29]

33 weeks

between this report and the 31 January 2027 deadline

47 sources

cited, dated and listed in full on pages 46 and 47

Three audiences, one evidence base

Everything in Parts One to Three is written to be understood by anyone. Part Four then splits into three dedicated briefings, so you can go straight to the pages written for your situation.

Industry and regulator

Dual-sourced data with reconciliation notes, the governance reality of an industry-led date, and a forecast with published resolution criteria. Starts page 28.

Business, care and housing

The ISDN hard cliff, the price doubling, telecare and lift-line duties, and an audit checklist that fits on one page. Starts page 34.

Every UK household

What Digital Voice actually means, power cuts, pendant alarms, scams to dodge, and the do-nothing outcome explained honestly. Starts page 40.



PLAIN ENGLISH

Watch for the lightbulbs

Boxes like this one appear throughout. They translate jargon into plain English in a sentence or two, so the report stays readable whether you regulate networks for a living or just own a phone that lives in the hallway.

Our sourcing rule

Two streams, always labelled. **Official:** Ofcom publications, GOV.UK charters, parliamentary material. **Industry:** Openreach and BT announcements, and high-authority trade reporting led by ISPreview and Thinkbroadband. Where the streams disagree, we show both and explain why, most often a difference of date or scope rather than a contradiction. Every figure can be traced through the APA reference list on page 51.



TAKE ACTION

While you read: is your own line ready?

Pop your postcode into [broadbandswitch.uk](https://www.broadbandswitch.uk) and see in under a minute which full fibre and digital voice deals, drawn from 35+ UK providers, already reach your address. It is the same checker used by thousands of UK households every week, and it is free.

Only have five minutes?

Read page 5 for the whole picture, page 26 for how we will be marked, and page 50 for the eight signals to watch between now and January.

DATED

SCOPED

SOURCED

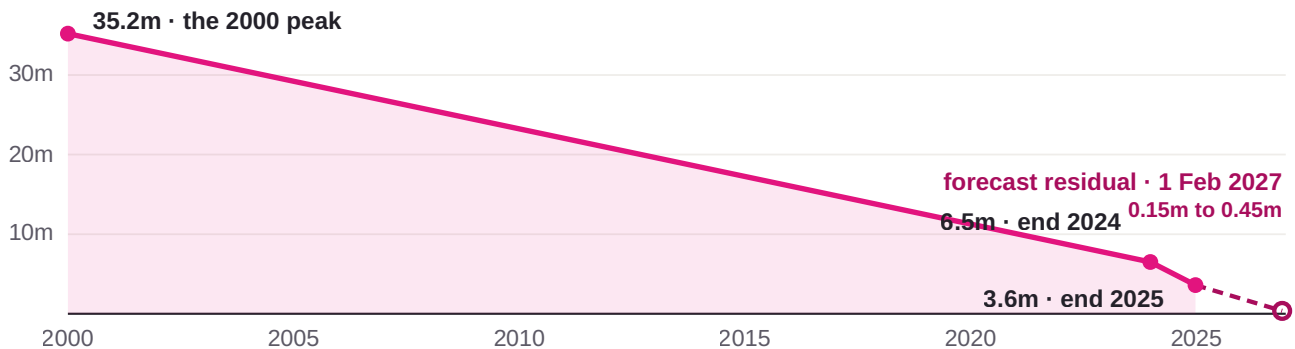
The network that outlived *its century*

The Public Switched Telephone Network is the copper-and-exchange system that has carried Britain's calls since the Victorian era. Its defining trick is that the line itself is powered: the dial tone comes down the wire from the exchange, which is why an old-fashioned corded phone keeps working in a blackout. For a century that resilience was the gold standard. Today the platform underneath it is dying of old age.

The numbers are stark. The legacy network still accounts for around 1% of British energy usage, a figure given by Openreach's own migration lead in June 2026. It suffered more than 2,600 major incidents in

2024/25, each affecting 500 or more customers^[21], and Ofcom recorded a 45% rise in significant resilience incidents in 2024. The parts that keep it alive are no longer manufactured anywhere: repairs increasingly rely on cannibalising decommissioned equipment, maintained by a generation of engineers heading into retirement.

So the question was never whether the PSTN would retire, only when, how cleanly, and who is protected on the way. The government's own line counts below show a quarter-century of managed decline arriving at its final winter.



Government line-count series: 35.2 million at the 2000 peak, 6.5 million at end 2024, 3.6 million at end 2025 (written statement HLWS1442, March 2026).^[43] Dashed continuation: this report's central forecast of a 150,000 to 450,000 residual at 1 February 2027.

That 1% is enough electricity to fully charge every iPhone ever made, around 2.5 billion of them, about 90 times over. Every year.

Working: ~2.7 TWh (1% of the UK's ~270 TWh of electricity) at ~12 Wh per full charge is ~225 billion charges, spread across the ~2.5 billion iPhones sold since 2007. Cumulative sales are an estimate; Apple stopped reporting unit figures in 2018.



PLAIN ENGLISH

What actually is the PSTN?

Think of it as the original phone system: copper wires from your house to a local exchange, where analogue calls are switched the way they have been for generations. If your phone plugs into the wall socket itself rather than into your broadband router, you are very likely still on it.



A British telephone exchange of the mid-twentieth century. The same analogue switching still carries the lines being retired in 2027: a network that has, quite literally, outlived its century.

Who actually owns 31 January 2027

Here is the fact that reframes everything: the switch-off date is not a law, and it is not an Ofcom deadline. The House of Commons Library's April 2026 briefing puts it plainly: the withdrawal of the PSTN is industry-led, and decisions on migrating customers are made by the companies that operate and provide services on the network. BT Group owns the retirement of the PSTN platform itself; Openreach is separately withdrawing the wholesale products (WLR and the ISDN family) that ride on it; and the hundreds of communication providers who resell those products migrate their own customers.

Government has explicitly declined to legislate, stating it would not be appropriate to pass legislation to cease a migration, because the underlying network is

failing regardless. Ofcom's power is over conduct during the migration, principally General Condition C5 on protecting vulnerable customers, and it has shown teeth: a £23.8 million fine for Virgin Media in December 2025. But neither the regulator nor the minister sets the calendar.

That cuts both ways for anyone hoping for, or fearing, another delay. Moving the date requires nothing more than a BT decision, exactly as happened in May 2024. But equally, no statutory lever exists to force one. In practice, the 2023 precedent shows the real mechanism: a serious incident, ministerial convening, and a voluntary industry pause within weeks. The trigger is harm, not arithmetic.



PLAIN ENGLISH

WLR in plain English

Wholesale Line Rental is how most providers sold you a landline without owning any wires: they rented BT's line and put their own name on the bill. When Openreach withdraws WLR, every provider renting it must move its customers to something newer. That is the product actually being switched off.

Delay versus exception: the distinction this report turns on

A **delay** means BT publicly announces a new national date, as in May 2024. An **exception process** means the date stands while unmigrated lines are routed onto transitional products. Headlines often blur the two. Our forecast says the second is what you should expect to see.

The governance reality, in the Commons Library's own words

The withdrawal "is industry-led. It is not the direct result of government policy"^[7]: thirteen words that explain why no minister can simply move the date, and why conduct rules are where the real power sits.

What switches off on 31 January 2027

SERVICE	WHAT HAPPENS	WHERE IT LANDS
Analogue landline (WLR voice)	Product withdrawn. Provider must have migrated you to digital voice.	Digital Voice over broadband; or EVAc lifeboat if unmigrated
ISDN2 and ISDN30 (business digital lines)	Ceased outright. Openreach confirmed in June 2026 these have no migration path and no lifeboat.	Nothing. Replacement (SIP, hosted VoIP) must be in place beforehand
Equipment dialling over the line (some alarms, lifts, terminals, tele-care)	Analogue signalling stops being guaranteed; devices must be digital-ready or replaced.	IP or mobile signalling paths, arranged with each equipment provider

Sources: Openreach via ISPreview (June 2026); House of Commons Library CBP-9471 (April 2026). Full citations: page 51.

For the typical household, the replacement is Digital Voice: the same number, usually the same handset, but plugged into the back of your broadband router instead of the wall socket. In the year to July 2025 alone, Ofcom recorded 1.9 million residential lines making that move, two-thirds of them customer-led. BT passed three million Digital Voice households in March 2026, the majority of its base.

For business, the picture is sharper-edged. The highlighted row above is the single most under-reported

fact of the entire programme: ISDN lines, the workhorses of older office phone systems, simply cease. There is no emergency fallback for them. Around 80% of BT's business voice customers had moved to all-IP by January 2026, which still leaves a long tail of those who have not, and Part Two shows that business lines are migrating at a fraction of the required pace.



PLAIN ENGLISH

Digital Voice, plainly

Your calls travel over your broadband connection instead of the old copper voice network: same number, same ring, different plumbing, and the phone now plugs into the router.

5 Sep 2023

the national stop-sell: no new analogue orders anywhere since

8,000+

switch orders a day at the March 2025 peak^[30]

31 Oct 2026

free voice-only migrations end^[27]

What does not switch off (and why the cliff is softer than the headlines)

Your broadband. The retirement is of the analogue voice platform. Copper-based broadband (FTTC, SO-GEA) continues to work after January 2027, and full fibre is untouched entirely. Nobody's internet goes dark because the PSTN retires.

Fully unbundled lines. Around 3.38 million lines (as of February 2026)^[30] are run by providers such as Sky and TalkTalk using their own equipment inside BT exchanges, a setup called MPF. Because those lines do not ride on the WLR product being withdrawn, they continue past January 2027 and only fall away when their host exchange eventually closes, mostly after 2030. That one fact materially softens the January cliff for millions of homes.

The wires and exchanges themselves. Openreach's separate exchange exit programme will eventually shrink around 5,600 exchanges to roughly 1,000, but only 108 are scheduled by December 2030 and the bulk close after that. Even the pilots are instructive: the first closure, Deddington, took 26 months for about 1,800 lines^[40], and two further pilots slipped a full year because fewer than 300 lines were not ready. The copper estate winds down over a decade, not overnight.

Anyone caught short. As the next page explains, un-migrated voice lines are gated onto an emergency lifeboat rather than disconnected. Openreach's own framing, on the record in June 2026: there will be no big bang.



PLAIN ENGLISH

So is my internet switching off?

No. This is a phone-platform retirement, not an internet switch-off. If you have broadband today you will have broadband on 1 February 2027. The thing changing is how your landline calls travel.



TAKE ACTION

Curious what your line could be doing instead?

Full fibre now passes more than three-quarters of UK homes. See what has reached your street from the 35+ UK providers we compare, and what it costs, with a free postcode check at broadbandswitch.uk/compare.

3.38m

unbundled lines continue past January 2027, unaffected^[30]

26 months

to empty Deddington, the first exchange closed, of 1,800 lines^[40]

Dec 2030

the PDPL stopgap's published end date^[5]

The safety valves: the escape hatch BT built for itself

Three transitional products sit at the heart of our forecast. Together they let the platform retire on schedule while nobody is left without a way to call for help, which is precisely why we judge a formal delay unlikely.

PRODUCT	WHAT IT IS	WHO IT IS FOR	STATUS AND LIFESPAN
SOTAP Analogue	An analogue-style line served from IP equipment in the exchange. No broadband, no new kit, no engineer visit, line-powered as before.	Vulnerable and edge-case users on existing lines	Launched nationally 28 October 2025; transitional to around 2030
PDPL (Pre-Digital Phone Line)	BT Wholesale's packaging of the same capability: a best-efforts PSTN lookalike.	Migration-only cohorts, latterly telecare users	Available until December 2030; closed to new sign-ups by mid-2026
EVAc (Emergency Voice Access)	The last-ditch lifeboat: a stripped-back, voice-only line that keeps calls, crucially 999, working. No broadband, no alarm or lift signalling.	Unmigrated WLR voice lines at the deadline, moved via a gating process: not every line transfers automatically, and capacity applies	Pilots in Salisbury and Mildenhall from 3 August 2026; becomes the residual product from February 2027

Sources: Openreach announcements and ISPReview reporting, October 2025 to June 2026; BT Wholesale PDPL product handbook. Full citations: page 51.



PLAIN ENGLISH

EVAc, explained simply

Imagine the deadline arrives and your line still has not moved. Instead of going dead, it is quietly switched to a life-raft service: you can make and receive ordinary calls and you can always dial 999, but the line does nothing else. It exists so that missing the deadline is inconvenient rather than dangerous.

Why this matters to the forecast

The 2023 pause happened because vulnerable people were put at risk of losing their lifeline. EVAc, PDPL and SOTAP remove that failure mode. With the safety argument structurally defused, the case for delaying the whole national programme to rescue the final few hundred thousand lines largely evaporates. BT has, in effect, pre-built its own contingency, and our 72% scenario is simply that contingency working as designed.

Missing the deadline is designed to be inconvenient, not dangerous.

Seven myths, retired

THE MYTH	THE FACT
"Every copper wire goes dead on 1 February 2027."	The analogue voice platform retires. Copper broadband continues, 3.38 million unbundled lines carry on past the date, and the physical copper winds down with exchange closures stretching beyond 2030.
"The internet is being switched off."	Nothing about this programme turns off broadband. If anything it accelerates upgrades: full fibre passed 78% of UK premises by July 2025 ^[36] .
"The government set the deadline."	The date is a BT Group commercial decision. Government has said it will not legislate, and Ofcom regulates conduct, not the calendar.
"If I do nothing, I will be cut off."	Unmigrated voice lines are gated onto an emergency lifeboat (EVAc) rather than disconnected. Doing nothing still costs you: features vanish and the underlying price has been doubling. But the dial tone, and 999, survive.
"My pendant alarm will definitely stop working."	Not if the migration is done properly. Engineer-checked processes (Prove Telecare) now test the alarm with its monitoring centre before completing, reverting to copper if it fails. The real risk is unmanaged moves, which is why you must tell your phone provider you have telecare.
"Digital landlines are a downgrade."	Clearer audio, the same number, and scam-call screening tools the old network never offered. The one genuine regression, power-cut behaviour, is real and has a defined fix: battery back-up, free for those who depend on the line.
"It will definitely be delayed again, like last time."	Possible, and we price it at 23%. But 2024's delay happened because no safety net existed. This time the lifeboats are built, the network is measurably failing, and the economics point one way. Hence our verdict: the date holds, softly.

Substantiation for every row appears in Parts Two and Three, with sources on page 51.

The test for any switch-off claim you read

Does it name the date, the scope and the source? Every figure in this report carries all three, which is also the fastest way to spot the ones elsewhere that carry none.

The road here: announcement, harm, pause, delay

November 2017

Industry announces the intention to retire the PSTN, with December 2025 as the working end date. From a base that stood at more than 16 million lines and channels.

5 September 2023

National stop-sell: no new WLR or PSTN-based products can be ordered anywhere in the UK. The only direction left is off.

November to December 2023

Serious telecare failures emerge during forced migrations, including two reported deaths of vulnerable customers on Virgin Media O2's network whose personal alarms failed^[16]. The programme's defining crisis.

14 December 2023

The Technology Secretary summons providers. Non-voluntary migrations are paused across the industry within days of the harm coming to light.

18 December 2023

The PSTN Charter is signed by BT, Virgin Media O2, Sky, TalkTalk, Vodafone, Shell Energy and KCOM: no forced migration without confirmed telecare protection.

March 2024

The Network Operator Charter follows, extending commitments to the firms that run the wires rather than just sell the service.

Mid-May 2024

BT announces the delay: completion moves from December 2025 to 31 January 2027, "allowing us to align the programme with full fibre broadband customer upgrades where available". Note the soft, caveated wording.

July 2024

Ofcom fines BT £17.5 million over the June 2023 999 outage, in which around 14,000 emergency calls failed to connect^[32] during a ten-hour incident. Resilience becomes the regulator's sharpest enforcement theme.

November 2024

The Critical National Infrastructure Charter and the non-voluntary migration checklist arrive: no CNI line may be ceased without notice, with escalation to government before any forced move.



PLAIN ENGLISH

Why the 2023 pause matters so much to the forecast

It set the reaction template. When real harm appeared, industry paused within weeks, voluntarily, under ministerial pressure rather than law. Any future delay would almost certainly arrive the same way: triggered by an incident, not by arithmetic.

The road back, and the road ahead

February 2025

The Telecare National Action Plan is published jointly by DSIT and the Department of Health and Social Care.

March 2025

The cross-party Digital Communities APPG publishes Care to Connect, warning that risk to life remains and demanding universal data sharing, central funding and longer battery back-up.

October 2025

Prove Telecare goes nationwide: engineers test the alarm with its monitoring centre before completing a migration, reverting to copper if it fails. SOTAP Analogue launches on 28 October.

1 December 2025

Ofcom fines Virgin Media exactly £23.8 million for systemic failures in identifying and protecting telecare users between August 2022 and December 2023^[37]. Accountability for the crisis that caused the delay.

15 December 2025

BT Redcare, the famous alarm-signalling service, closes after its own four-month slip, with around 120,000 systems migrated to successors^[1]. A completed dress rehearsal for managed withdrawal.

February 2026

Openreach declares the technical barriers to telecare migration resolved and the deadline locked. Its total PSTN count stands at around 2.8 million here, about half a million of them business; the adjudicator's narrower WLR series read about 2.7 million the month before, a difference of scope, not direction.

April to June 2026

The squeeze begins: wholesale prices up 20% on 1 April, free voice-only migrations from 8 June, and by 11 June the remaining total falls to roughly 1.9 million^[29].

1 July and 1 October 2026

Two further price rises take the old line's basic rental to roughly double its baseline. The strongest commercial lever fires last.

3 August 2026

EVAc, the emergency lifeboat line, pilots in Salisbury and Mildenhall. Its success or failure is a key watchlist signal.

31 January 2027

The PSTN platform retires and WLR is withdrawn. Our forecast: the date holds, with 150,000 to 450,000 lines landing in the lifeboats.

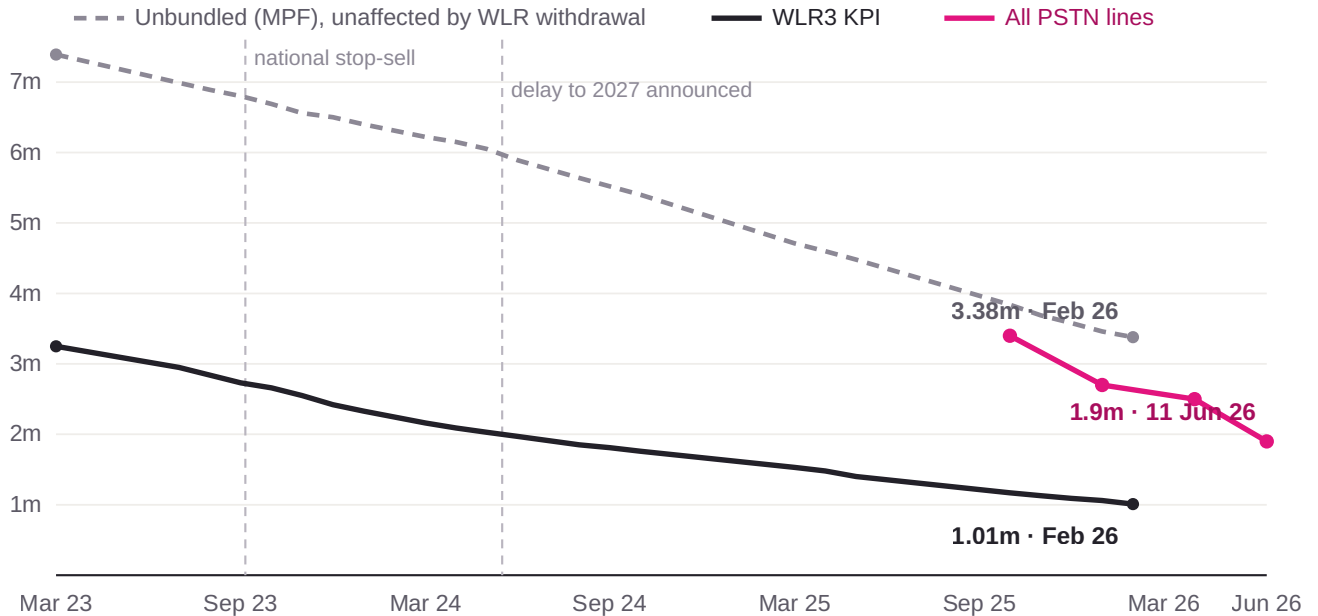
February 2027 to December 2030

EVAc becomes the residual product; PDPL and SOTAP wind down by the end of 2030 as the exchange exit programme gathers pace. The copper era closes gradually, not with a bang.

Timeline sources: GOV.UK charter publications; Ofcom enforcement notices; Openreach announcements; House of Commons Library CBP-9471; ISPreview reporting 2023 to 2026. Full citations: page 51.

The migration maths: one network, *three rulers*

Three official-looking lines describe the same retreat, and conflating them has muddled much of the public coverage. The charcoal line is the Telecommunications Adjudicator's monthly KPI for Openreach's WLR3 product. The pink line is the broader migration-tracking total for all PSTN-dependent lines across every provider, the figure that actually decides whether the deadline is met. The grey dashed line is the unbundled pool run by rival operators on their own exchange kit, draining on its own schedule and untouched by the WLR withdrawal.



Charcoal: OTA monthly WLR3 KPI, March 2023 to February 2026.^[30] Grey dashed: OTA unbundled (MPF) lines over the same span.^[30] Pink: all-PSTN migration tracking (OTA, October 2025 and January 2026) continued by Openreach figures reported by ISPReview, April to June 2026;^[29] the 1.9m endpoint is a senior manager interview figure, not a formal statistical release. Openreach separately cited around 2.8m in February 2026, illustrating the definitional spread.^[25]

Same decline, different rulers

Different scope, not contradiction: one product line versus every line that still depends on the platform. When you see a suspiciously small "remaining" number in coverage elsewhere, it is usually the KPI being mistaken for the total.

Forty-four against fifty-two: the gap that writes the ending

Required to reach zero by 31 January 2027

52,000 / week

OTA, Jan 2026

Actual, sustained since January 2026

44,000 / week

the gap:
8,000 / wk

The Office of the Telecommunications Adjudicator stated it plainly in January 2026: roughly 2.7 million WLR lines remained, falling 44,000 a week, against a required pace of around 52,000^[30]. The rate has barely moved since: 45,000 in November and December 2025, 44,000 through the new year. By June, the base was 1.9 million with about 33 weeks left.

The arithmetic from there is unforgiving. At a constant 44,000 a week, around 1.45 million lines clear by the deadline, leaving roughly 400,000 stranded. Clearing everything would demand a sustained 31% acceleration, every single week, through the hardest cohort of

all: the people and businesses who have ignored every letter so far, the niche equipment, the premises where voice and broadband sit with different providers.

That is why our forecast treats a residual tail as close to certain, and why the interesting question is its size and its safety, not its existence. Openreach's own migration lead concedes reaching zero is unlikely, calling the last stretch the hardest because it is made of customers who do not want to move or have niche products on the line.

OTA UPDATE	ACTUAL WEEKLY RATE	STATED REQUIREMENT
November 2025	45,000	about 50,000
December 2025	45,000	about 50,000
January 2026	44,000	about 52,000
February 2026	44,000	"below required" (no figure stated)
Business lines, early 2026	about 2,000	see page 18

Office of the Telecommunications Adjudicator monthly updates; Openreach via ISPReview and B4BC. Full citations: page 51.



PLAIN ENGLISH

Why the last lines are always the hardest

Big migrations follow an S-curve: the willing move early, the persuadable move when nudged, and what remains is the small core for whom every nudge has already failed. The final 10% of any national switchover routinely takes disproportionate effort, which is exactly why lifeboat products exist.

The business lag, and the only true cliff edge

~475,000

business lines still on the legacy network, February 2026 (Openreach via B4BC)

~2,000

business lines migrating per week in early 2026

4.6 yrs

time to clear that backlog at that pace. The deadline is 33 weeks away

Residential migration gets the headlines; business is where the residual will actually live. Openreach warned in February 2026 that around half a million business lines had still not moved, and the sector's weekly run rate was a rounding error against the requirement. B4BC's blunt assessment: at roughly 2,000 a week, clearing the backlog would take nearly five years^[4].

The awareness picture explains why. Survey after survey through 2025 and 2026 found large minorities of firms either unaware of the switch-off or treating it as low priority: roughly three in ten businesses unaware in Gamma's research, 42% of small firms unaware in

Spitfire's, and 72% not treating it as a priority even when told. Vendor-commissioned surveys deserve a pinch of salt, and we flag that, but the direction is consistent across every source.

And for one group the consequence is absolute. ISDN2 and ISDN30, the digital lines behind countless older office phone systems, cease outright on 1 February 2027. Openreach confirmed in June 2026 there is no migration path and no lifeboat for them: no EVAc, no PDPL, nothing. A business that has not replaced ISDN by the deadline does not get a degraded service. It gets silence.

Lifeboat or sea

Voice lines that miss the deadline land in a lifeboat; ISDN lines that miss it land in the sea. If your phone system was installed before about 2018 and you have never checked, check this week. The one-page business audit is on page 35.

~475,000

business lines still unmigrated, February 2026^[25]

~2,000/wk

the business migration rate against that backlog^[30]

1 Feb 2027

ISDN ceases outright, no lifeboat, no fallback^[29]

Telecare: the 1.8 million people who matter most

Around 1.8 million people in the UK rely on telecare: 1.3 million through alarms in their own homes and half a million in care homes^[10], supported housing and sheltered settings. These are the people the 2023 failures harmed, the reason the date slipped, and the cohort on which any future delay decision will turn.

The technical fix has matured. Prove Telecare, nationwide since October 2025 with more than 35,000 protected migrations completed by June 2026^[42], tests the alarm with its monitoring centre before a migration completes and reverts to copper if it fails. The data fix is murkier: over 96% of local authorities providing telecare had signed at least one data sharing agreement by May 2025^[21], but a council signing with one provider does not cover the others, and people who bought alarms privately sit outside every register. No national figure exists for how many of the 1.8 mil-

lion have actually been identified, contacted and safely moved: a gap the government itself concedes.

Two facts deserve plain words. First, devices still fail over digital lines at measurable rates: 2.3 to 3.4% in TSA testing, around 5% in FarrPoint's estimate, and up to 11.5% in the worst cases reported by Which?^[44]. For a device whose one job is summoning help, single digits are not small. Second, a Which? investigation in August 2025 found three of the seven largest UK telecare providers still selling analogue-only devices to consumers^[44], a year after ministers asked the practice to stop. Our research found no confirmed migration-caused death since the two 2023 cases, and an Ofcom-run incident framework now reports quarterly to government, but the ingredients for an incident have not been eliminated.

98.6%

of housing and care organisations aware of the deadline

36%

expect to complete their digital upgrade by 2027. The awareness paradox in two numbers (Housing LIN and Appello, 2026)

67%

of Scotland's 142,000 telecare users already on digital monitoring by April 2025: the national frontrunner



PLAIN ENGLISH

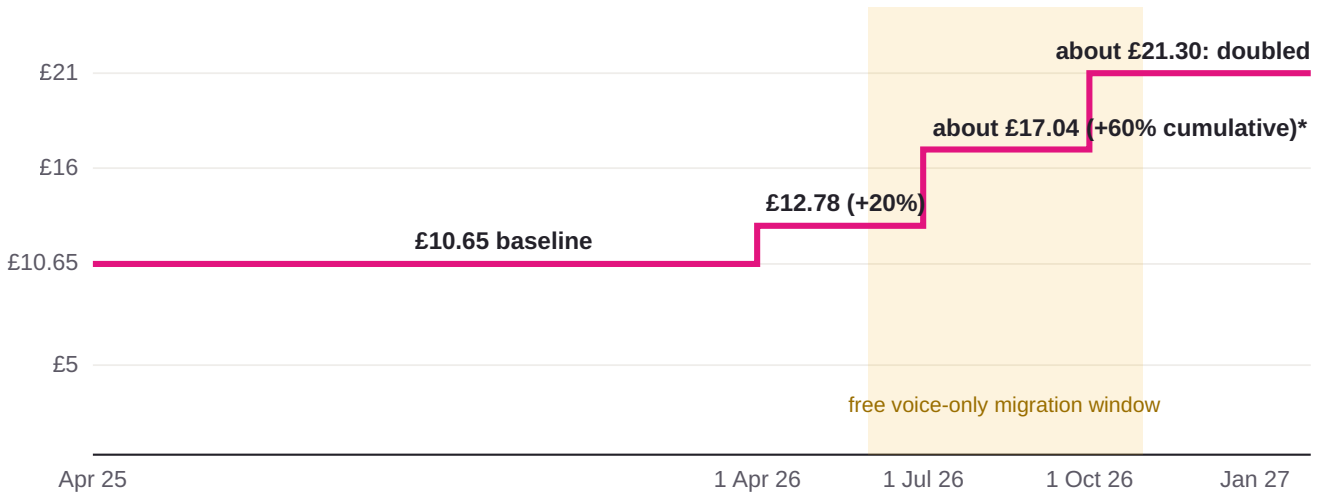
What is telecare, exactly?

A pendant, wristband or home sensor that calls a monitoring centre when pressed or triggered, summoning help around the clock. Many older devices speak an analogue dialect down the phone line, which is why every single one must be checked, and upgraded if needed, before the line beneath it changes language.

Sources: DHSC Telecare Stakeholder Action Plan; TSA; FarrPoint; Which? (August 2025); Housing LIN and Appello Digital Telecare Readiness Report 2026; Scottish Government and Digital Office for Scottish Local Government. Full citations: page 51.

Price as policy: doubling the cost of standing still

Openreach is not waiting politely. The wholesale rental for a basic legacy line is being stepped up three times in seven months, a deliberate lever to push the laggards, and the industry feedback is that it is working: Zen's chief executive credits the rises with moving providers who had been slow to act.



Openreach wholesale price announcements via Thinkbroadband and ISPreview. *July figure derived from Openreach's stated cumulative structure rather than separately published; flagged accordingly. Retail prices vary by provider.

The carrot sits alongside the stick: between 8 June and 31 October 2026, Openreach is funding free migrations for voice-only lines, the cohort least likely to move unprompted. And the modern alternative is simply cheaper: Thinkbroadband calculated a like-for-like SOGEA service undercuts the old line-plus-broadband combination by around £21 a year even before the rises bite.

For the forecast, October is the date that matters. The full doubling lands on 1 October 2026, the free window closes at the month's end, and the run rate response in the weeks either side is the single best leading indicator of how big the residual tail will be. Page 50 builds it into the watchlist.

TAKE ACTION

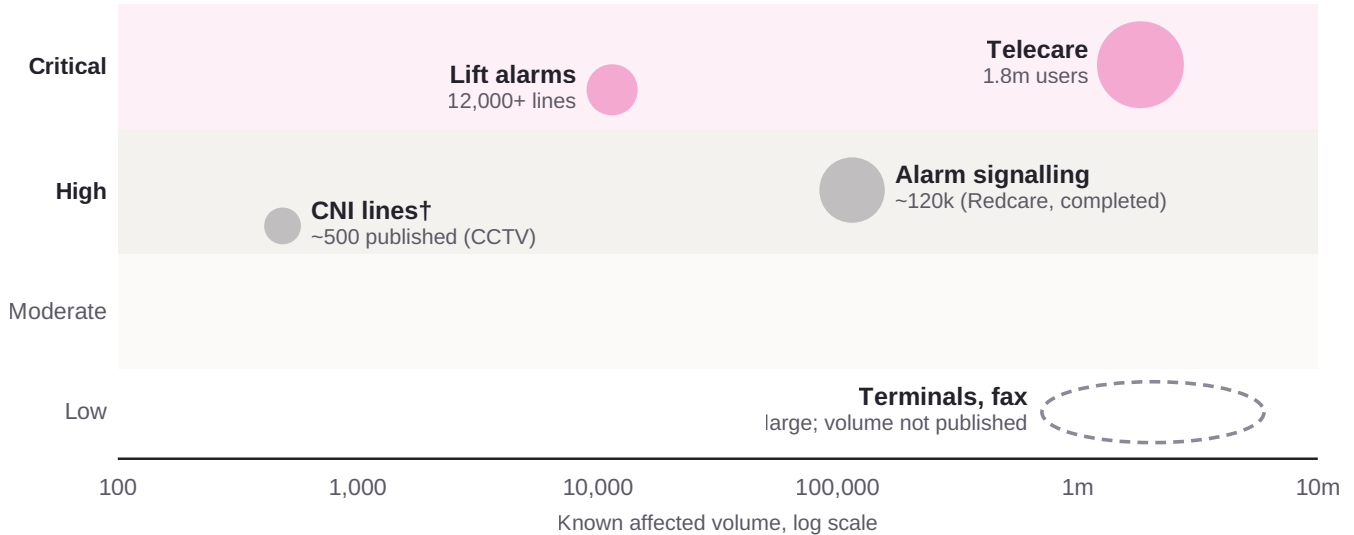


Paying legacy prices for a legacy line?

If your bills have been creeping up on an old copper service, that is the doubling working as designed. Compare what full fibre and digital voice cost at your address across 35+ UK providers in under a minute: broadbandswitch.uk.

Dependent systems: where the genuine risk concentrates

The PSTN quietly carries far more than conversation. Plotting the known affected volumes against life-safety severity shows where attention belongs, and where the headlines overstate.



Volumes: Openreach (12,000+ lift lines and around 500 CCTV lines stated February 2026); BT Redcare closure reporting (~120,000 systems, migrated by December 2025); DHSC (1.8m telecare users). †CNI plotted on its only published figure, the CCTV line count; the true critical infrastructure estate is larger but not publicly quantified, which is itself a finding. Severity assignments: BroadbandSwitch.uk editorial judgement.

The Redcare dress rehearsal

A famous analogue service, a hard close date, its own four-month slip, an insurance-driven scramble, and then: completion, without systemic safety failure, as around 120,000 systems crossed to successors. Dependent systems resolve through parallel commercial migrations around the date, not by moving the date. Expect the same pattern at national scale.

The rule that covers every system on this map

If it plugs into a phone socket, it belongs on a risk list. The one-page audit on page 35 turns this map into an afternoon's work.

What the rest of the world did

Forecasting works best from base rates: what actually happened when comparable countries retired comparable networks. The pattern is strikingly consistent.

COUNTRY	PROGRAMME	OUTCOME	LESSON FOR THE UK
Sweden (Telia)	Copper plan from 2015	Targeting completion by 2026; substantial copper retired, not yet complete	Even early movers run multi-year tails
Germany (Deutsche Telekom)	Forced migration from 2014	Substantially complete around 2018 to 2020	Forcing works, but fax and alarm failures made the headlines
Estonia (Telia)	National switch 2017	Completed	Small, digital-ready nations move fastest
Netherlands (KPN)	Voluntary, from 2007	The textbook long tail before completion	Voluntary processes leave stragglers for years
Norway (Telenor)	Closure by 2022	Completed	Early, managed, quiet
Spain (Movistar)	Copper closure	Completed 27 May 2025	Recent proof a full national close can land
France (Orange)	Progressive closure	Target slipped toward 2030	Gradualism trades speed for calm
Japan (NTT)	From 2010s	Targeting around 2028	Even giants take two decades
Australia (NBN)	Forced regional windows of 18 months	Bulk done by June 2022, plus 6-month continuity extensions and special catch-up rounds for fire-alarm and lift lines	The closest analogue to EVAc thinking: hard dates, soft landings, and a national medical-alarm register, around 180,000 users, that the UK chose not to build ^[47]

Sources: national operator and regulator publications via Datagate, ULAP, DRF Consultants, DIDWW, CNMC (Spain) and the Australian National Audit Office. Full citations: page 51.



PLAIN ENGLISH

What history says

Across every comparable retirement we examined, a clean close on the first announced date essentially never happens, one formal slip is common, and a managed tail is the norm. Britain has already taken its slip. History says what comes next is the tail.

How we modelled the ending

A forecast is only as good as its method. Ours triangulates three approaches that each work for different reasons, and we show the working so you can disagree with precision.

One: run-rate extrapolation. The simplest honest model. Take the 1.9 million lines remaining on 11 June 2026, apply observed weekly migration rates across the roughly 33 weeks left, and see where the arithmetic lands. Its strength is that it cannot be argued with; its weakness is that rates change, which is why we run three rate scenarios rather than one.

Two: reference-class forecasting. Rather than reasoning from the inside of this programme, ask what actually happened across every comparable migration: the UK digital TV switchover, the 3G shutdown, and eight national PSTN retirements from Sweden to Australia. The base rate is unambiguous: headline dates broadly hold, clean completions essentially never

happen, and managed tails are the norm. Page 22 holds the full table.

Three: scenario weighting. Combine the arithmetic with the base rates and the structural facts (the safety valves, the failing network, the absence of any statutory delay lever, and the one genuine wildcard of a telecare incident), and assign explicit probabilities. Vague forecasts can never be wrong; ours can, deliberately.

The result, held since our first analysis and re-tested against everything in Part Two: **72%** the date holds with a managed tail, **23%** a formal delay, **5%** a clean completion, with a central residual of **150,000 to 450,000 lines** on the morning of 1 February 2027.



PLAIN ENGLISH

What is reference-class forecasting?

A technique with a strong track record in megaproject research: instead of asking "how do we feel about this project?", ask "what happened to all the projects like it?". Insiders are reliably optimistic about their own timelines; history is not.

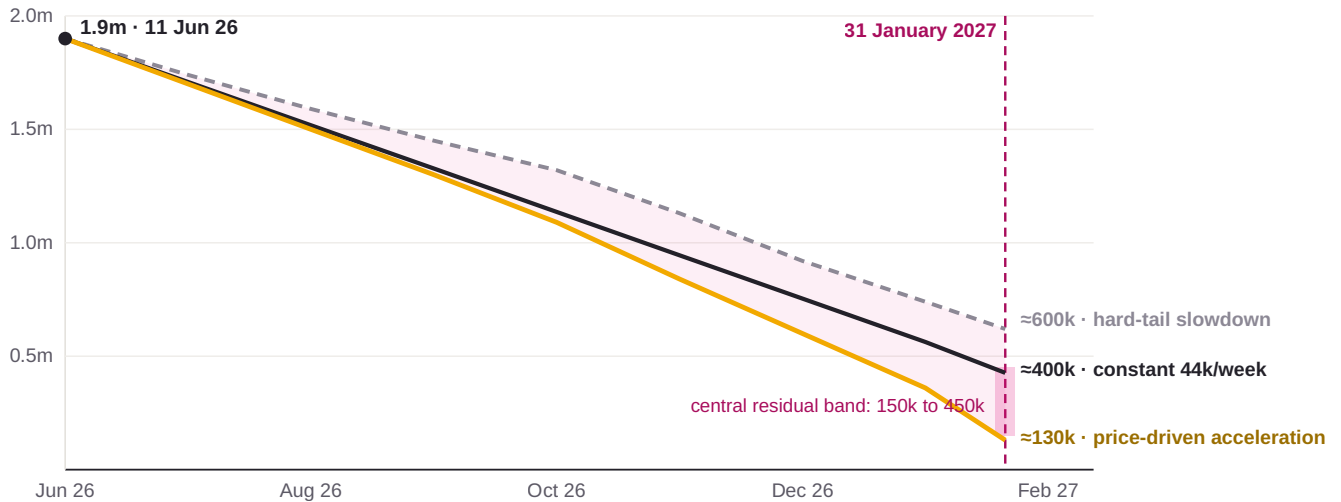
● 72% managed tail ● 23% formal delay ● 5% clean completion

Why publish numbers at all

Vague predictions can never be wrong, and never being wrong is how you spot analysis that was never serious. Page 26 publishes the marking scheme; February 2027 marks it.

Thirty-three weeks, three trajectories

From the 1.9 million baseline of 11 June 2026, here is where each migration pace lands the country on deadline day. Every path leaves a residual. The question is only its size.



Model: BroadbandSwitch.uk deterministic projections from the 1.9m baseline (Openreach via ISPReview, 11 June 2026). Constant scenario holds the observed 44,000 weekly rate; acceleration assumes the July and October price rises and free voice-only migrations lift the average toward 52,000 plus; the hard-tail curve lets the rate decay as easy migrations exhaust. Illustrative deterministic paths, not guarantees.



PLAIN ENGLISH

How to read a fan chart

All three lines start from the same fact and differ only in assumed pace. Reality will wobble between them. The pink shaded band on the deadline line is our central call: wherever the wobble ends up, we expect between 150,000 and 450,000 lines still standing when the platform retires.

The three futures in detail

SCENARIO	PROBABILITY	WHY WE WEIGHT IT THIS WAY
A. Date holds, managed tail	72%	The network is failing in plain sight: around 1% of British energy usage, 2,600 plus major incidents a year, no manufactured spares. Openreach declared the deadline locked in February 2026 and has pre-built the escape hatch (EVAc, PDPL, SOTAP) that removes the cut-off argument. Government will not legislate. Major providers are on track, the price doubling is biting, and every international precedent points to exactly this shape of ending.
B. Formal further delay	23%	The programme has slipped once and BT has a history of missing self-set dates. Telecare data remains incomplete, analogue devices are still being sold, and the late-2026 acceleration squeezes the most vulnerable cohort hardest. A single high-profile death during a forced migration, against the backdrop of the 2025 resilience outages under Ofcom investigation, could trigger a pause within weeks, exactly as in 2023.
C. Clean completion	5%	Requires clearing 1.9 million lines at a sustained 31% above the observed rate, through the hardest residual cohort, including roughly 475,000 business lines moving at 2,000 a week. No comparable national migration has ever finished clean on its announced date. Arithmetically and historically implausible.

The single sentence we expect to look prescient

On 1 February 2027 the PSTN will be declared retired on schedule, the headlines will report the switch-off as done, and somewhere between 150,000 and 450,000 lines will quietly still be drawing a dial tone through EVAc, PDPL and surviving unbundled connections. A soft landing. Not a clean finish. Not a delay.

What would move the numbers up. A weekly run rate sustained above 55,000 after the July price rise, a smooth EVAc pilot, and business migration breaking 5,000 a week by September would push scenario A toward 80% and shrink the residual toward the bottom of the band.

What would move them down. A rate stuck below 35,000 for two consecutive adjudicator reports, a stumbling EVAc pilot, or any serious telecare incident would lift the delay scenario sharply, toward 35 or 40%, and we would say so publicly within days.

How to mark our homework

Most forecasts are written so they can never be graded. Ours comes with its own marking scheme, published before the event. On 1 February 2027, hold us to it.

VERDICT	IT HAS HAPPENED IF, AND ONLY IF
"Date held, managed tail" our 72% call	Openreach proceeds with the national WLR and PSTN closure on or around 31 January 2027, AND a non-trivial residual (more than 50,000 lines) is gated onto EVAc, PDPL or equivalent transitional products rather than fully migrated.
"Formal delay" our 23% call	BT or Openreach publicly announces a new national withdrawal date later than 31 January 2027: a third programme-wide slip, however framed.
"Clean completion" our 5% call	Effectively zero residual (fewer than 25,000 WLR lines) at the deadline, with no reliance on EVAc at national scale.

Why publish this? Because it is the cheapest possible test of seriousness. A forecaster who defines success after the fact can claim anything; one who defines it in advance, in print, with numbers, is staking reputation on being checkable. We will publish our own scorecard in the first week of February 2027, whichever

way it lands, and we will keep the model updated monthly on our site in the meantime.

There is a technical name for this discipline: making the forecast Brier-scoreable, after the scoring rule that rewards calibrated probabilities rather than lucky guesses. You do not need the mathematics to apply the test. You just need the table above and a calendar.



PLAIN ENGLISH

The October decision point

Mark 31 October 2026 in your diary. If more than a million lines remain at that point with the rate still below 60,000 a week, the deadline is in genuine trouble. If the count is under half a million and falling with the EVAc pilot reported successful, the soft landing is effectively confirmed. One date, one number, and you will know the ending three months early.

Screenshot this page. Score us in February.

The strongest case against us

Confidence without counter-argument is just marketing. Here is the best evidence-based case that we are wrong, stated as its advocates would state it.

The case for a formal delay. The run rate has been flat at 44,000 for half a year against a stated requirement of 52,000, and the gap has never closed. Business lines, nearly half a million of them, are moving at a pace that would take years, and ISDN customers face a genuine cliff with no lifeboat. The telecare data problem is unsolved: no national completion figure exists, analogue devices are still on sale, and the very cohort that triggered the 2023 pause will be squeezed hardest in the final quarter. Meanwhile the 2025 outages at BT and Three put 999 access under Ofcom investigation, and the exchange exit pilots have already slipped a year over fewer than 300 laggard lines. If 300 lines can delay an exchange, the argument runs, what will 400,000 do to a nation?

The case that the tail will dwarf our band. If the hard-tail dynamic bites earlier than modelled, with the

weekly rate decaying through autumn as the willing exhaust, the residual could exceed 600,000, making the lifeboats an embarrassment of scale rather than a footnote.

Why we still hold 72/23/5. Each point above is real, and none changes the structural facts. The exchange pilots slipped because closure there strands every line; the national programme does not strand anyone, by design, because EVAc exists. The CNI charter gives government an escalation path short of delay. And the steelman's strongest exhibits, the run-rate gap and the business lag, are precisely why we forecast a six-figure residual rather than a clean finish. They are arguments about the size of the tail, not the existence of a third date. We would rather publish the counter-case and be tested than hide it and be safe.

Updates, corrections and the live tracker

The migration numbers move monthly. We track them, with this report's thresholds marked, at broadbandswitch.uk, and any material change to our probabilities will be published there first with reasoning attached.

52k v 44k

the required pace against the actual, the delay case's best card^[30]

11.5%

worst-case telecare call failure reported by Which?^[44]

Two deaths

bought the last delay in 2023; the precedent stands^[16]



PART FOUR A · THE BRIEFINGS

For industry and the regulator

Five pages written for the readers who already know what WLR stands for: the governance reality, the data discipline, and what an accredited comparison service should be doing with all of it.

In this briefing

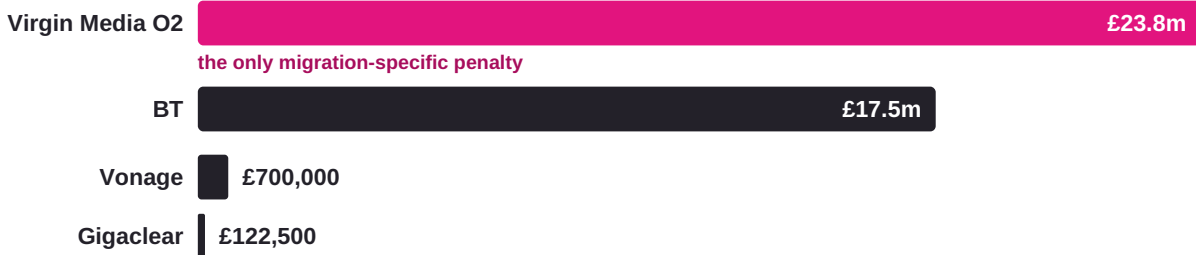
The conduct-not-calendar enforcement pattern and the £41.3 million precedent set by the BT and Virgin Media fines · why residual composition, not a binary switch-off, is the metric that matters from February 2027 · the two-series reconciliation standard for reporting remaining lines · the monitoring gaps (telecare completion, ISDN base, provider-level residuals) and the FOI route to closing them · and how this evidence base supports digital comparison tool accreditation standards.

Conduct, *not calendar*: the enforcement record

Ofcom cannot move the date. What it can do, and has done with increasing force, is punish failures of conduct along the way. The full enforcement record around the migration and its resilience context now totals more than £42 million.

PROVIDER	PENALTY	DATE	MATTER	RULE BREACHED
Virgin Media O2	£23.8m	1 Dec 2025	Telecare migration failings, Aug 2022 to Dec 2023; 42,991 telecare customers contacted in remediation	GC C5.2
BT	£17.5m	22 Jul 2024	999 outage of 25 Jun 2023: nearly 14,000 failed call attempts from 12,392 callers over ten and a half hours	GC A3.2; Communications Act ss.105A/105C
Vonage	£700,000	25 Sep 2025	VoIP business 999 outage, Oct to Nov 2023	GC A3.2(b)
Gigaclear	£122,500	30 Jul 2025	Inaccurate caller location on 948 emergency calls	GC A3.5/A3.6(a)

All figures from Ofcom enforcement decisions; each penalty includes a 30% settlement discount. Only the Virgin Media case is migration-specific; the other three are emergency-access matters, and analysts who merge the two categories misread the regulator.



The Virgin Media decision defines the migration era. Ofcom's enforcement director called it unacceptable that vulnerable customers were put at direct risk of harm, and the remediation it accepted, manual record reviews, a continuous-engagement loop for non-responding telecare users instead of disconnection, and an agreed end-of-process with local authorities, now

functions as the operating manual for every provider's final-quarter push.

Expect conduct enforcement at full volume through to February 2027 while the calendar stays untouched: General Condition C5 on vulnerable customers, A3.2 on emergency access, and the two open investigations into the BT and Three mobile outages of summer 2025 as the live resilience front.

The measurement problem, and the discipline that fixes it

Three official-looking line counts circulate, and conflating them has produced more bad reporting than any other single error. The Telecommunications Adjudicator's monthly WLR KPI tracks one Openreach product family and stood at 1.01 million in February 2026. The broader migration-tracking total covers every PSTN-dependent line across every provider and read roughly 2.7 million in the same season, falling to 1.9 million by 11 June. And the government's own series, published in a Lords written statement in March 2026, gives the long arc: 35.2 million lines at the 2000 peak, 6.5 million at the end of 2024, 3.6 million at the end of 2025^[43].

None of these contradicts the others. They measure different things on different dates, and the govern-

ment series provides a rare independent cross-check on industry figures. The discipline that prevents error is simple: never publish a line count without its date, scope and source attached, and never let a product KPI masquerade as the national total.

One further measurement trap deserves industry attention. Connected Nations 2025 reported a fall in significant resilience incidents, but Ofcom's own text concedes part of the cause: as migration shrinks the PSTN, incidents increasingly affect too few customers to cross reporting thresholds. The regulator plans to consult on those thresholds in 2026. Until then, the falling incident count is partly a measurement artefact, and honest analysis says so.

The three series, side by side

SERIES	WHAT IT COUNTS	LATEST VALUE	SOURCE
OTA WLR KPI	Openreach WLR3 product lines	1.01m (Feb 2026)	OTA monthly updates
Migration-tracking total	All PSTN-dependent lines, all providers	1.9m (11 Jun 2026)	Openreach via ISPreview
Government series	PSTN lines, year-end	3.6m (end 2025)	Written statement HLWS1442



PLAIN ENGLISH

Why this page exists

An accredited comparison service lives or dies on data discipline. Publishing the reconciliation, rather than quietly picking the most dramatic number, is the standard this report holds itself to and invites others to match.

35.2M IN 2000

6.5M END 2024

3.6M END 2025

The independent cross-check

The government's own series^[43] moves in lockstep with the industry numbers above, which is precisely what makes the reconciliation publishable rather than merely plausible.

What nobody publishes, and how we intend to find out

The most important numbers in this programme are the ones that do not exist in public. We name them here, because an honest gap register is worth more than a confident guess, and because each one is now the target of a formal information request from BroadbandSwitch.uk.

MISSING DATASET	WHY IT MATTERS	LIKELY HOLDER
ISDN2 and ISDN30 channel base	Sizes the only true hard cliff; no published count exists anywhere	Openreach; BT regulatory reporting; Ofcom
England telecare migration completion rate	The single number on which the delay scenario turns; only Scotland publishes	DSIT and DHSC via the Telecare National Action Plan
Quarterly incident-framework aggregates	Ofcom has reported migration incidents to government quarterly since July 2024; no aggregate has ever been released	Ofcom; DSIT
Provider-level residual line counts	Locates the tail by company, exposing the slow movers	Individual CPs; OTA

The precedent is instructive. The two 2023 deaths only became public because a Financial Times freedom of information request to DSIT forced partial disclosure, the department releasing timing data while withholding causal findings. Public-interest grounds for the datasets above are at least as strong, and the requests are drafted to survive the standard exemptions.

For providers, the November 2024 non-voluntary migration checklist remains the operative compliance text for the final quarter: process re-assessment be-

fore resuming forced moves, no telecare user migrated without a confirmed working solution, battery back-up beyond the one-hour minimum where committed, a continuous-engagement loop rather than disconnection for non-responders, post-migration checks, and an agreed end-of-process with local authorities. The March 2026 charter adds a twelve-month minimum public notice before any network or service switch-off. Auditors and journalists alike should test conduct against that list, item by item.

Hold us to it

Every information request on this register publishes in full at broadbandswitch.uk when answered, including refusals and the grounds given.

[ISDN BASE](#)
[TELECARE ENGLAND](#)
[INCIDENT AGGREGATES](#)
[DEFENCE ESTATES](#)

How to measure February 2027 honestly

If our forecast holds, the platform retires on schedule while a six-figure residual lands on transitional products. The wrong question for that morning is "did the switch-off happen?", because the answer will be a technically true yes that hides everything interesting. The right metrics are about the tail: how many lines landed on EVAc, what proportion of them are vulnerable or telecare households, how quickly the residual drains through 2027, and how many ISDN businesses went dark with no lifeboat at all.

We commit to tracking and publishing exactly those numbers, alongside the self-scoring of this report's forecast against the resolution criteria on page 26, in the first week of February 2027 and monthly there-

after. Residual composition, not the binary, is the story.

A closing note on standards. Ofcom's voluntary accreditation scheme for digital comparison tools audits whether information is accessible, accurate, transparent, comprehensive and up to date, with prices refreshed at least fortnightly and quarterly spot checks. Seven services hold accreditation. The sourcing discipline running through this report, dual streams, dated figures, published reconciliations, a marking scheme for our own predictions, is that standard applied to analysis rather than price tables, and it is the standard we believe switch-off coverage now needs.

TAKE ACTION



For industry readers

The live residual tracker, the monthly probability updates and the February 2027 scorecard will publish at broadbandswitch.uk. Corrections and challenges to any figure in this report are welcome and answered.

THE FEBRUARY 2027 SCORECARD, PRE-BUILT	WHAT WE PUBLISH
Residual size	Lines remaining on 1 February, against our 150,000 to 450,000 band
Tail composition	EVAc enrolment, vulnerable and telecare share, business share
The ISDN dark count	Business lines that ceased with no lifeboat
Our own score	The forecast marked against page 26's criteria, whichever way it lands

Beyond the big three: *who else is on the line*

Industry, business and households are the audiences this report briefs in depth. But a national network retirement touches institutions that rarely appear in the coverage, so here is the honest map: what is in scope, what protection exists, and where the public record simply goes dark.

STAKEHOLDER	EXPOSURE	PROTECTION IN PLACE	WHAT SHOULD HAPPEN NOW
Emergency services and 999	Around 15% of 999 calls still begin on a landline, ^[46] and blue-light estates carry the same alarm, lift and gate-line dependencies as any campus	999 access survives on every migration path, including the EVAc lifeboat; ^[26] Ofcom's £18.3m of emergency-access fines show the rule has teeth ^{[32][35]}	Estate audits via page 35; battery and mobile fallback planning for control rooms and stations
Critical national infrastructure	Traffic signals, rail, water and energy telemetry still ride analogue lines	The CNI Charter: no critical line ceased without notice, with escalation to government before any forced move; ^[13] EVAc excludes critical alarm signalling by design ^[26]	Named migration owners at every operator, inventories complete before the autumn acceleration
Defence and homeland security	Unequivocally in scope: defence estates and secure sites sit on the same national copper as everyone else	Handled inside the CNI escalation route; no public figures exist for defence exposure, residuals or readiness	We have added defence-estate exposure to the public gap register on page 31, where it belongs until someone publishes
Schools, GPs, pharmacies, community buildings	Fire panels, lift lines, door entry, payment terminals and healthcare fax: the classic dependency cluster, often unowned	None specific: the programme treats them as ordinary business lines	The one-page audit on page 35, with one twist for schools below

The defence row deserves a plain statement. This report fabricates nothing, and nothing public exists on military or homeland-security exposure to the switch-off: no line counts, no readiness statistics, no exemption lists. That is probably as it should be for security, but it means the honest answer to "is the military ready?" is that the mechanism exists, the CNI escalation route, and the evidence does not. It joins the ISDN base and England's telecare completion rate on our published gap register, and our information requests, rather than in a confident paragraph nobody could check.

Schools carry one risk the audit alone does not catch: timing. Migrations and engineering work complete during the holidays precisely because buildings are empty, which is also exactly when a failed alarm line, lift phone or door-entry system fails silently. The fix costs nothing: put line testing on the first-day-back checklist for every term, alongside the fire drill. GP surgeries and pharmacies should treat the NHS fax and the alarm line the same way after any weekend works notice.



PART FOUR B · THE BRIEFINGS

For UK business, care homes and housing

Six pages for every organisation with a line, a lift, an alarm or a duty of care: what ceases, what it costs to wait, and the audit that takes an afternoon now or a crisis in February.

In this briefing

The one-page audit: every line, every device, every contract · the ISDN hard cease and the SIP migration path · the price doubling arithmetic and the free voice-only migration window closing 31 October 2026 · telecare, warden call and lift alarm duties for care and housing providers, with the engineer-checked migration process · and the payment terminal, door entry and fax long tail nobody has audited since 2019.

The one-page audit: an afternoon now, or a crisis in February

Print this page. Walk the building with it. Most organisations discover lines they forgot they had.

STEP	WHAT YOU ARE LOOKING FOR
<input type="checkbox"/> 1. List every line.	Pull twelve months of phone bills and list every number and circuit you pay for, including ones nobody remembers ordering. Flag anything marked WLR, analogue, PSTN, ISDN2 or ISDN30.
<input type="checkbox"/> 2. List every device on a line.	Lift emergency phones, fire and intruder alarm signalling, telecare and warden call, card terminals, door entry and gate systems, fax, franking machines, CCTV diallers, building management sensors. If it plugs into a phone socket, it is on the list.
<input type="checkbox"/> 3. Severity-rank them.	Life safety first: telecare, lift alarms, fire signalling. Then security and payments. Then convenience. Pages 38 and 39 give the fix for each.
<input type="checkbox"/> 4. Check the ISDN question.	If your phone system predates roughly 2018 and you have never replaced it, assume ISDN until proven otherwise. Those lines cease on 1 February 2027 with no fallback whatsoever.
<input type="checkbox"/> 5. Book replacements now.	Multi-site SIP or hosted voice migrations typically run six to nine months. The deadline is closer than that. Number porting alone takes ten to fifteen working days.
<input type="checkbox"/> 6. Diarise the money dates.	Wholesale legacy rental doubles by 1 October 2026, and the free voice-only migration window closes 31 October 2026. Waiting is now the expensive option.
<input type="checkbox"/> 7. Test everything after migration.	Every safety device: before, immediately after, at one to two weeks, and at three months.



PLAIN ENGLISH

Why the forgotten lines matter most

The fire alarm dialler installed in 2009 and the lift phone in the basement have been quietly working for so long that nobody owns them any more. They are exactly the lines that fail silently in February.

Completed by
name and role

Date

File the signed copy in the board risk register or compliance file; diarise review for 1 October 2026

The output: one signed page listing every line and device you own, severity-ranked, with replacements booked. It is the document your board, your insurer and, in care settings, your regulator can each accept as evidence the risk was assessed in time.

Leaving ISDN: the path and the clock



ISDN2 and ISDN30 were the workhorses of office telephony for thirty years, and on 1 February 2027 they simply stop. Openreach confirmed in June 2026 that no migration path and no lifeboat product exists for them: not EVAc, not PDPL, nothing. The replacement is voice over your data connection, in one of two shapes.

Hosted voice moves the phone system itself into the cloud: handsets or apps connect over broadband, the provider runs everything, and you pay per user per month. It suits most small and mid-sized organisations and removes the on-site equipment entirely. **SIP trunking** keeps your existing phone system and re-

places only the ISDN lines beneath it with digital channels, which suits organisations with newer systems they are not ready to write off.

The clock is the real message. A single-site hosted migration can land in weeks, but multi-site estates typically need six to nine months end to end, and number porting alone runs ten to fifteen working days per batch. Count backwards from 31 January 2027 and the comfortable booking window is now, not autumn. Organisations starting in November will be negotiating from desperation, against engineer diaries that are already filling.



PLAIN ENGLISH

SIP, in plain English

Session Initiation Protocol is simply the language phone calls speak when they travel over the internet instead of the old phone network. A SIP trunk is a bundle of those internet phone lines delivered to your existing system. Same handsets on the desk, different plumbing in the wall.

6 to 9

months for a typical multi-site voice migration, end to end

10 to 15

working days for number porting alone, per batch

Now

the last comfortable booking window before autumn diaries fill

The cost of standing still, by estate size

Openreach is doubling the wholesale rental on legacy lines through 2026, and your provider will pass it on. Here is the arithmetic at the basic wholesale rate, before VAT and retail margin, for organisations that do nothing.

ESTATE	ANNUAL WHOLESALE COST AT £10.65/MONTH (2025 BASELINE)	AT ROUGHLY £21.30/MONTH (FROM 1 OCT 2026)	ADDED ANNUAL COST OF WAITING
5 lines	£639	£1,278	£639
20 lines	£2,556	£5,112	£2,556
100 lines	£12,780	£25,560	£12,780

Illustrative, using Openreach's published basic WLR rental and its announced rises of 20% (1 April 2026) and 40% on 1 July and 1 October 2026. Retail prices vary by provider; the direction does not.

The carrot matches the stick. Between 8 June and 31 October 2026 Openreach is funding free migrations for voice-only lines, and the modern equivalent is already cheaper at standing rates: Thinkbroadband's like-for-like comparison puts a SOGEA line around £21 a year below the old line-plus-broadband combination^[23] before any of the rises bite.

Put bluntly: every quarter of delay now buys a worse price on the old line, a busier engineer market for the new one, and the same hard deadline at the end. The financially rational move and the operationally safe move have converged, which is exactly what the pricing was designed to achieve.

TAKE ACTION



Business lines, compared properly

Business-grade full fibre and digital voice deals for your postcode, compared across 35+ UK providers in minutes at broadbandswitch.uk.

£639

the annual cost of waiting, per five-line estate^[23]

31 Oct 2026

the free voice-only migration window closes^[27]

~£21/yr

the saving SOGEA already offers over the old line^[23]

Care and housing providers: this is safety governance now



For care homes, sheltered housing and supported living, the switch-off is not an IT project. It is a duty-of-care question that belongs on the risk register and in front of the board, because the systems at stake are the ones residents press when something has gone wrong.

Three facts shape the work. First, grouped systems behave differently from dispersed pendants: warden call and communal alarm installations need coordinated, building-level upgrades, not a per-device swap. Second, the data safety net has holes: over 96% of councils providing telecare have signed at least one data sharing agreement, but one agreement does not cover every phone provider, and residents who bought alarms privately are invisible to all of them, so providers must assume identification is their own job. Third, the kit market is not yet clean: Which? found three of the seven largest telecare firms still selling

analogue-only devices in August 2025, so insist on TEC Quality certified, digital-ready equipment in every procurement.

The migration itself now has a tested process. Prove Telecare puts a trained engineer on site who confirms the alarm connects to its monitoring centre before the switch completes, and reverts the line to copper if it fails; more than 35,000 such protected migrations had completed by June 2026. Demand it by name for every affected resident, test before and after, again at one to two weeks, again at three months, and document every test. That paper trail is precisely what a regulator or coroner will ask for, and Scotland, with 67% of its 142,000 telecare users moved to digital by April 2025 and 78% of connections digital-ready by May 2025^[20], proves the whole exercise is entirely achievable.

35,000+

engineer-protected telecare migrations completed by June 2026^[42]

67%

of Scotland's 142,000 telecare users moved to digital by April 2025^[20]

3 of 7

major telecare firms still sold analogue devices in August 2025^[44]

Lifts, alarms and the long tail of quiet machines

Lift emergency phones. More than 12,000 lift lines had still not migrated as of February 2026^[25], and the legal bar is unforgiving: EN 81-28 requires two-way emergency voice that keeps working in a power cut. The fastest compliant fix for most buildings is a GSM autodialler with battery back-up, prioritising high-rise, firefighting and care-setting lifts. An entrapment with a dead line is the scenario every building owner is one missed audit away from.

Alarm signalling. The Redcare closure of December 2025 already forced this market through its migration, around 120,000 systems crossing to successors, and it set the template: insurers expect a dual-path replacement certified to BS EN 50136, the so-called

DP3 grade, combining IP and mobile signalling so no single failure silences the alarm. If your intruder or fire signalling predates that switch, confirm with both your alarm company and your insurer that the replacement path is in writing.

The quiet machines. Older card terminals that dial out over analogue lines, door entry and gate systems, fax machines still embedded in healthcare workflows, franking machines and building telemetry all share the same fate and the same fix: identify, replace with IP or mobile equivalents, and test. None of them is individually dramatic, which is exactly why they are the lines most often discovered in February rather than June.



PLAIN ENGLISH

What DP3 means

Dual-path, grade three: the alarm signals over two independent routes at once, typically internet and mobile, so cutting one cannot silence it. It is the standard insurers treat as the like-for-like successor to the old Redcare service.

The pattern across every system on these two pages

Audit, severity-rank, replace with a dual-path or mobile-backed digital equivalent, then test on a schedule. The technology differs; the discipline does not.

12,000+

lift lines still to migrate, February 2026^[25]

~120,000

alarm systems crossed in the Redcare closure^[1]

EN 81-28

the lift standard: emergency voice must survive a power cut



PART FOUR C · THE BRIEFINGS

For every UK household

Four pages in plain English: what actually changes in your hallway, what to do if someone in your home wears a pendant alarm, and the honest answer to "what if I just ignore all of this?".

In this briefing

The Digital Voice switch, step by step, and the equipment that simply plugs into the router · power cuts and the free battery back-up you can ask for if you depend on your landline · the telecare conversation to have with both providers before anything moves · the switchover scams to hang up on · and how to check whether your street is full-fibre ready in under a minute.

Will I be cut off? No.

Even if you do nothing, your voice calls and 999 keep working. Unmigrated lines are moved onto an emergency calling service on 31 January 2027, not switched off. You lose features and pay more by waiting, but you are never left without a way to call for help.

SAME NUMBER

MOST HANDSETS FINE

NEW SOCKET: THE ROUTER

Only have five minutes?

Page 41 is the switch itself, page 42 is power cuts and pendants, page 43 is the scams. Everything else is detail.

The switch, step by step



For most households this is genuinely small. Your provider writes to you, typically about four weeks ahead. On the day, your phone moves from the wall socket to a port on the back of your broadband router. Your number stays the same, calls sound the same or clearer, and most modern corded and cordless handsets work without any fuss. Many people complete the whole thing themselves in two minutes; engineer visits are reserved for those who need them, including telecare users, where the engineer tests the alarm before leaving.

Two honest wrinkles. Phones plugged into extension sockets around the house stop working, because

those sockets connect to the old line; the fixes are a plug-in adapter, a cordless base at the router with extra handsets around the home, or asking your provider about wiring options. And a digital line depends on your broadband and on mains power, which is why the next page deals with power cuts properly rather than waving them away.

One genuine upside deserves a mention: digital lines carry scam-call screening tools the copper network never could, which matters in a country where the landline is a fraudster's favourite door.



PLAIN ENGLISH

Will my old phone work?

Almost certainly yes, if it has a standard plug and push buttons. It just plugs into the router instead of the wall. The rare exceptions are very old dial phones and some specialist devices, which is exactly what the engineer visit exists to catch.



TAKE ACTION

Is your broadband ready to carry your calls?

Digital Voice rides on your broadband connection, so it is worth knowing what your line can actually do. Run the free speed checker at broadbandswitch.uk/broadband-speed-test and then see what full fibre is available at your address at broadbandswitch.uk/compare.

Power cuts, pendants and the people who depend on the line



The power cut truth. An old corded phone drew its power down the line from the exchange and worked in a blackout. A digital phone does not, because the router needs mains electricity. The rules, set by Ofcom in 2018 and reaffirmed in 2023, require providers to give at-risk customers a free solution keeping emergency calls possible for at least one hour, and a cross-party group of MPs argued in March 2025 that one hour is not enough, recommending at least four hours in homes and six for the wider network. So if your landline is your lifeline, do three things: tell your provider you depend on it, ask for the free battery back-up unit, and register on their vulnerable customer or priority services list. BT customers can simply

dial 150. A charged mobile in a drawer is a sensible second layer, signal permitting.

The telecare double call. Around 1.8 million people rely on pendant alarms and similar telecare. If that is your household, or your mum's, make two calls before anything changes: one to the phone provider to say a telecare device is on the line, one to the alarm provider to confirm the device is digital-ready. Never let the switch happen until both have said yes in plain words. The engineer-checked process then tests the alarm with its monitoring centre on the day and reverses the change if anything fails. Test the alarm yourself before the switch, straight after, a week or two later, and again at three months.



PLAIN ENGLISH

Why does a digital phone die in a power cut?

Because the box that makes it work, your router, plugs into the mains. The old network sent electricity down the copper with the call. The new one does not, so the back-up battery does that job instead, which is why asking for one matters.

1 hour

the minimum free battery back-up for dependent customers

Dial 150

BT customers: the single call that registers you as dependent

4 tests

before the switch, after, at one to two weeks, at three months

No broadband, and you want to keep it that way?

You are not being forced online. If you only want a phone, your provider can move you to a phone-only line that needs no internet and no router, keeps your number, and is built for exactly this situation. Ask for it by name when they contact you, and confirm there is no charge for the phone-only connection.

Scams to hang up on, and the honest do-nothing answer

The switchover scam playbook. Fraudsters love a national deadline, and this one is a gift to them. The rules that protect you are short: your real provider will never ask for your bank details, card number or password to "complete your switch", will never ask for remote access to your computer, and will never demand an upfront fee with urgency attached. Anyone doing any of those things is a criminal, however convincing the caller display looks. Hang up, wait a few minutes, and call the number printed on your bill. The official campaign's own watchword applies: providers never ask for passwords or bank details.

If you do nothing at all. Here is the truthful version, without the scare and without the soothe. You will not wake up on 1 February 2027 cut off. Unmigrated lines are gated onto an emergency-only service that keeps calls and 999 working but carries nothing else, while the price of staying old-fashioned has been deliberately doubling. Doing nothing costs you features, money and eventually patience, but it is designed not to cost you safety. Engaging when your provider writes to you remains the better deal in every respect.



While the router is in your hands: the family safety moment

The switchover is the one day this decade when every household touches its router settings, and that makes it the perfect moment to set up parental controls properly: content filters, safe search and age-appropriate limits take minutes while you are already logged in. BroadbandSwitch.uk's own Online Safety hub walks through every major UK ISP's filters step by step at broadbandswitch.uk/online-safety, with further family-safety guides across our FBRE.uk network at fbre.uk.

TAKE ACTION



Two minutes, one postcode

Compare full fibre and digital voice deals from 35+ UK providers at your address, with real prices and the protections of the one-touch switching process: broadbandswitch.uk/compare.

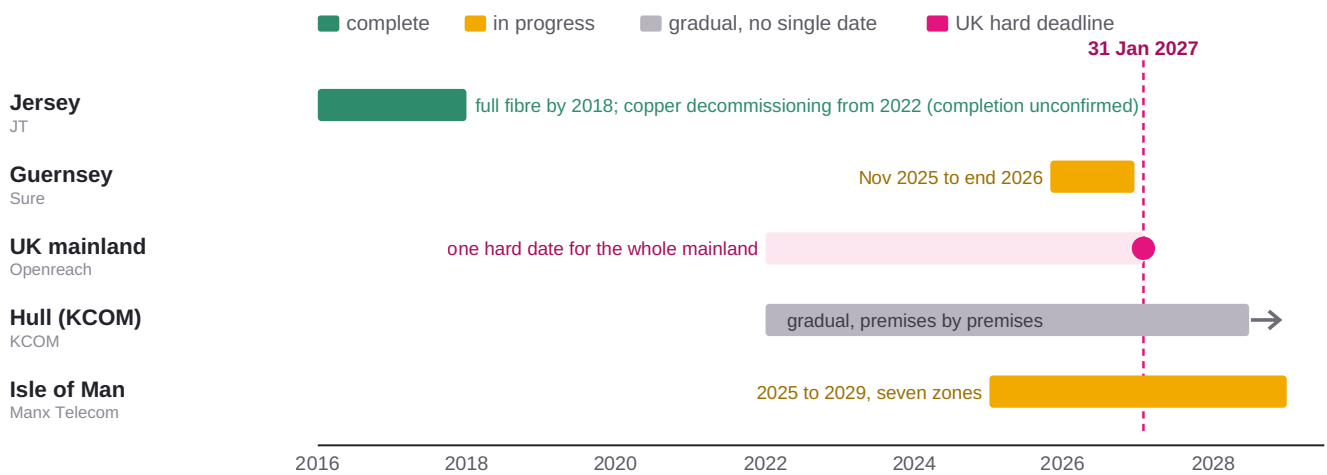
Hang up. Wait. Call the number on your bill.

The switch-off the *headlines miss*

One date has dominated this report, and rightly so. But 31 January 2027 is not quite a national event. The Openreach PSTN and ISDN withdrawal covers the whole of the UK with two deliberate exceptions: the KCOM network in Hull and East Yorkshire, and the three Crown Dependencies of the Isle of Man, Jersey and Guernsey. Each runs its own copper retirement, on its own timetable, under its own rules. Island and Hull businesses that assume the mainland date applies to them are working to the wrong clock, in both directions.

Hull is the standout. KCOM, not Openreach, owns the access network there, so the WLR withdrawal and the

wholesale price rises simply do not reach it. KCOM runs its own migration: a gradual, premises-by-premises move to full fibre with no single hard switch-off day, and an exchange-level interim that lets a home without a fibre connection keep its copper for now. KCOM reports around 60% of premises upgraded, a full-fibre footprint of 305,000 premises to its March 2025 results, roughly 200,000 of them in Hull, and battery back-up for vulnerable customers. Newer rivals, MS3, CityFibre and Grain, now pass most of the city too, so Hull's choice, timing and pricing all differ from the rest of Britain.



Switch-off timing by territory. Jersey and Guernsey via JT and Sure; the UK mainland via Openreach; Hull via KCOM; the Isle of Man via Manx Telecom. Positions as reported to June 2026.

The Crown Dependencies, *compared*

The islands are ahead of the mainland on fibre and, in Jersey's case, years past it. What they share is independence from Ofcom and Openreach; what differs is the operator, the regulator and the pace. The table reads across the British Isles at a glance.

TERRITORY	NETWORK	REGULATOR	FULL FIBRE	SWITCH-OFF WINDOW	VULNERABLE BACK-UP
UK mainland	Openreach	Ofcom	Over 75% passed	One date: 31 Jan 2027	EVAc voice line, plus battery units
Hull and East Yorks.	KCOM	Ofcom	305,000 premises	Gradual, no single date	Battery back-up for vulnerable
Isle of Man	Manx Telecom	CURA	99% target, ~41,000 properties	2025 to 2029, seven zones	No disconnection until a solution is in place
Jersey	JT	JCRA	Effectively 100% since 2018	Decommissioning from 2022*	Free four-hour battery units
Guernsey	Sure	GCRA	98% can connect	Nov 2025 to end 2026	Free four-hour units for Lifeline users

*Jersey's exact copper completion date is not publicly confirmed; JT's formal decommissioning programme began in September 2022. See the per-island notes below.

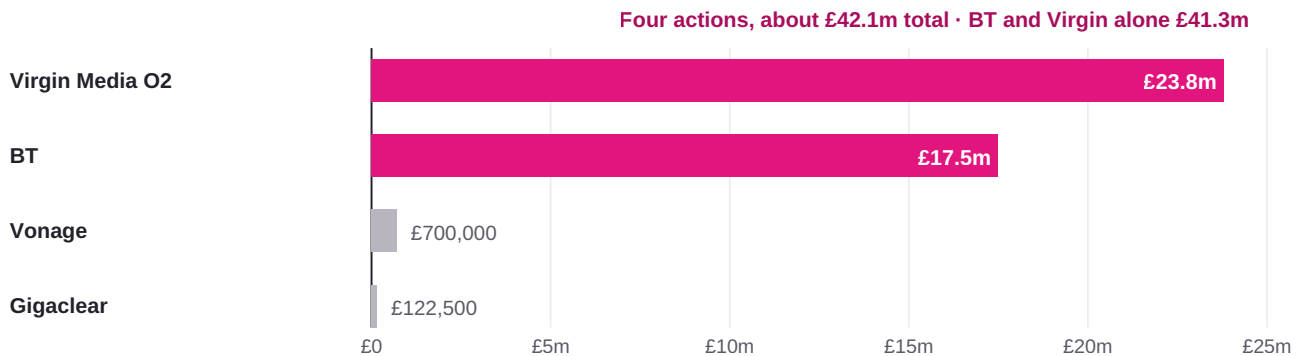
Isle of Man. Manx Telecom began retiring copper in 2025 and will finish no later than 2029, regulated by CURA. The island is split into seven zones switched in turn, each property gets at least 12 months from first contact, with Temporary Exclusions for those who need longer, and a dedicated guide sits at copper-switchoff.im. A £50m commercial build plus £10m of government funding targets 99% full fibre of roughly 41,000 properties, and no vulnerable customer is disconnected until a suitable solution, covering lift lines, personal alarms and care monitoring, is in place.

Guernsey. Sure began its copper switch-off on 3 November 2025, with all landlines due on fibre by the end of 2026, regulated by the GCRA. By its March 2026 update, 98% of premises could connect and 79%, some 21,330 customers, had switched. Each property has a 12-month window once it is made fibre-ready, the rollout represents about £37.5m of investment including up to £12.5m from the States of Guernsey, and free four-hour battery units are provided to Lifeline and other vulnerable users.

Jersey. JT declared Jersey effectively the world's first full-fibre jurisdiction in 2018, and free four-hour battery units were agreed for vulnerable and community-alarm customers. Its formal copper decommissioning programme began in September 2022. We flag honestly that an exact date for completion is not publicly confirmed, with sources differing, so we state only what is verified: fibre to every premises by 2018, decommissioning under way since 2022, regulated by the JCRA.

The switch-off *in charts*

Two pictures carry most of the argument. First, what the enforcement record actually weighs. Ofcom cannot move the deadline, but it has fined hard for failures of conduct around it.



Ofcom enforcement decisions, 2024 to 2025. Only the Virgin Media O2 penalty is migration-specific; the other three are emergency-access matters. Each includes a 30% settlement discount.

Second, the question everyone actually asks: what stops working, and what does not. The line between the two is cleaner than the headlines suggest.

SWITCHES OFF on 31 Jan 2027

- ✗ Analogue landline (the PSTN itself)
- ✗ Wholesale Line Rental (WLR)
- ✗ ISDN2 and ISDN30 (no lifeboat at all)
- ✗ ADSL and FTTC over the copper phone line
- ✗ Alarms, telecare and card terminals that dial out over that old line

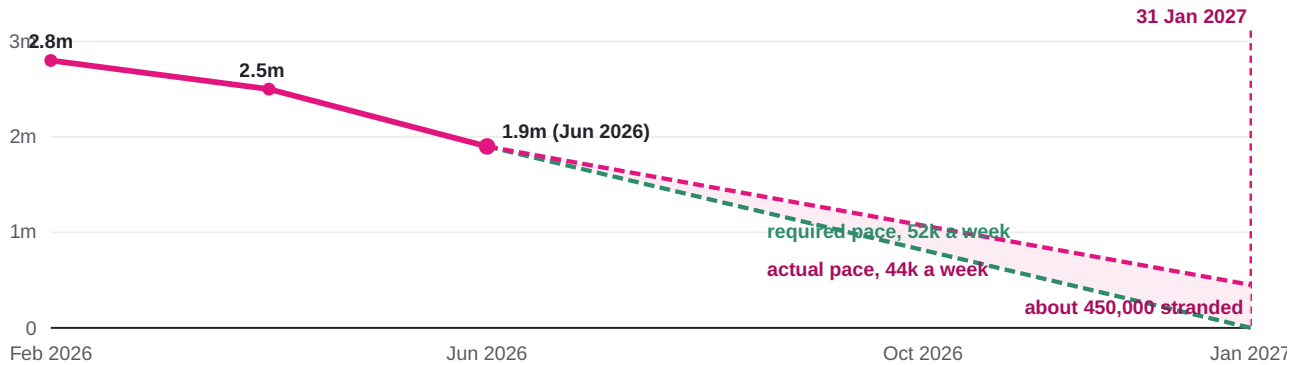
CARRIES ON unchanged

- ✓ Full fibre (FTTP)
- ✓ SOGEA: broadband on copper, no phone
- ✓ Digital Voice and VoIP calls
- ✓ Virgin Media cable (its own migration)
- ✓ Mobile, and fully unbundled lines until each exchange finally closes

Broadband itself does not go dark: copper broadband simply moves to fibre or SOGEA. ISDN is the one product with no fallback.

The road to *zero*

Strip away every nuance and one chart remains. The base has fallen from over sixteen million lines to about 1.9 million by June 2026. Whether it reaches zero by the deadline depends entirely on the pace held through the final winter, and the two projections below have very different endings.



Remaining lines: Openreach total PSTN count (Feb 2026) and all-provider WLR figures (Jun 2026); projections from the run rate in the OTA January 2026 update. The shaded wedge is the residual at the current pace.

So the British Isles picture is really three stories at once. Jersey has already arrived, Guernsey and the mainland are close behind on very different clocks, and the Isle of Man has years to run. For a reader, the practical test is the same everywhere: find out who runs your network, then ask when your address is due. On the mainland that answer is a single date; in Hull and the islands it is a local programme you can plan around.

The honest forecast holds. The platform almost certainly retires on schedule while a six-figure residual lands on transitional products, and the only true cliff is ISDN. That is good news told plainly: this is a phone-platform retirement, not an internet switch-off, and almost everyone has somewhere better to land. The job between now and the final winter is simply to make sure nobody is left standing on the old platform by accident.

Sources for this section: Manx Telecom and CURA via copperswitchoff.im; JT and the JCRA; Sure and the GCRA; KCOM results to 31 March 2025 and its switchover materials; Ofcom enforcement decisions; OTA and Openreach migration updates. All as reported to June 2026, in line with this report's house standard of citing value, date and source.

What *ISPreview* makes of it

Ahead of publication we shared this report with Mark Jackson, editor-in-chief of the independent UK telecoms news site [ISPreview](#), which is cited throughout these pages, and asked for his own assessment of the switch-off. This is his reply, in full.



At the end of the day the old phone network (PSTN/WLR) is falling to bits and will finally be coming to an end on 31st January 2027. That date is not going to be delayed again. The vast majority of lines have already been migrated to modern digital alternatives and most of those that remain (currently 1.9 million) should be resolved before the deadline, but some will remain, mostly reflecting difficult (e.g. vulnerable) or disengaged customers and those with niche products on the end of their lines.

Crucially, there isn't much protection for businesses, which will be left at risk of disconnection if they don't take action now. The situation for consumers is, however, a little better as they will not face a hard cliff edge scenario or immediate disconnection on 31st January 2027.

Openreach currently plans to review any lines that remain and may place many of them on an Emergency Voice Access (eVAC) service, which is a last-ditch product that operates in a similar way to the old service, albeit without many of its features, no support for broadband (phone-only) and at significantly greater cost (prices for older copper lines are expected to double in October 2026).

The catch is that eVAC is only a temporary solution and probably won't last much past 2030, when Openreach start switching off thousands of legacy exchanges across the UK. Similarly, those on fully unbundled (MPF) lines, which over the years have primarily been sold by the likes of TalkTalk and Sky Broadband, should also continue to function past the deadline, at least until around 2030. But such providers will want to get any remaining customers off those long before then.

The message is simple, engage your communications provider now to enquire about solutions or upgrades, and base your decision on what they advise. But don't leave it until the last minute, lest you risk finding yourself being hit by huge price hikes or a weak temporary product that doesn't do everything you may need it to.

Supplied for this report, 16 June 2026. Also cited at references [22] to [24].

Mark Jackson
Editor-in-Chief, [ISPreview](#)

It is a striking measure of agreement. An editor who tracks this industry daily reaches the same headline that our forecast does from the evidence: the date holds, consumers get a soft landing, business is where the real exposure sits, and the practical advice is simply to act before the price doubling rather than after it. Where our work goes further is in putting numbers and a marking scheme to that judgement, and in mapping the territories, Hull and the Crown Dependencies, that sit outside the mainland date entirely.

The *acronym* decoder

Every abbreviation in this report, translated once and properly. Telecoms loves its alphabet; nobody should need to.

TERM	IN FULL, THEN IN PLAIN ENGLISH	TERM	IN FULL, THEN IN PLAIN ENGLISH
APPG	<i>All-Party Parliamentary Group.</i> The cross-party group scrutinising the migration	ISDN2 / ISDN30	<i>Integrated Services Digital Network.</i> Older digital business lines; cease outright 1 February 2027, no fallback
ARC	<i>Alarm Receiving Centre.</i> The staffed centre a tele-care pendant calls for help	KPI	<i>Key Performance Indicator.</i> A tracked headline metric, such as the OTA monthly migration count
CNI	<i>Critical National Infrastructure.</i> Traffic, rail and utilities; protected migration rules apply	MPF / LLU	<i>Metallic Path Facility / Local Loop Unbundling.</i> Rival-run lines using their own exchange kit; unaffected by the WLR withdrawal
CP	<i>Communication Provider.</i> Any company selling you phone or broadband service	Ofcom	<i>Office of Communications.</i> The UK regulator: polices conduct, not the calendar
DCT	<i>Digital Comparison Tool.</i> The category of comparison service that Ofcom accredits	OHP	<i>Openreach Handover Point.</i> The roughly 1,000 exchanges staying open as the rest close
DHSC	<i>Department of Health and Social Care.</i> Co-leads telecare policy with DSIT	OTA	<i>Office of the Telecommunications Adjudicator.</i> Publishes the monthly migration numbers this report tracks
Digital Voice	<i>BT's brand name, now generic shorthand.</i> A VoIP landline; the phone plugs into the router	OTS	<i>One Touch Switching.</i> Switch provider by contacting only the new one
DP3	<i>Dual Path, grade three.</i> Alarm signalling over two routes so one failure cannot silence it	PDPL	<i>Pre-Digital Phone Line.</i> BT Wholesale's stopgap packaging, available until December 2030
DSA	<i>Data Sharing Agreement.</i> Lets councils tell phone providers which households have telecare	PSTN	<i>Public Switched Telephone Network.</i> The original analogue phone system, retiring 31 January 2027
DSIT	<i>Department for Science, Innovation and Technology.</i> The department coordinating the charters	SIP	<i>Session Initiation Protocol.</i> The language internet calls speak; a SIP trunk replaces ISDN
EN 81-28	<i>European lift-safety standard 81-28.</i> Two-way emergency voice that must survive a power cut	SOGEA	<i>Single Order Generic Ethernet Access.</i> Broadband on a copper line with no phone service attached
EVAc	<i>Emergency Voice Access.</i> The last-ditch lifeboat line: calls and 999 only	SOTAP	<i>Single Order Transitional Access Product.</i> Analogue-style stopgap line from exchange kit; no broadband needed
FOI	<i>Freedom of Information.</i> A request under the 2000 Act, used here to prise unpublished data from public bodies	TSA / TEC	<i>TEC Services Association / Technology Enabled Care.</i> The care-technology body and its quality certification
FTTC	<i>Fibre To The Cabinet.</i> Fibre to the street cabinet, copper for the last stretch	VoIP	<i>Voice over Internet Protocol.</i> Phone calls travelling over a broadband connection
FTTP	<i>Fibre To The Premises.</i> Full fibre, all the way into the building	WLR	<i>Wholesale Line Rental.</i> Renting BT's lines to sell on; the product being withdrawn
GC C5 / A3.2	<i>General Conditions C5 and A3.2.</i> Ofcom's rules protecting vulnerable customers and 999 access		

Missing a term?

The full living glossary, kept current beyond this report's print date, is at broadbandswitch.uk/glossary.

The watchlist: seven months, *eight signals*

Forecasts should come with instruments. These are the eight readings we are watching between now and the deadline, with the thresholds that would change our numbers.

WHEN	SIGNAL	WHAT IT TELLS YOU
Monthly	OTA line counts and weekly run rate	Below 35,000 a week for two consecutive reports lifts the delay scenario sharply; above 50,000 sustained confirms the soft landing
1 Jul 2026	Run-rate response to the 60% price step	First read on whether price actually moves the laggards
3 Aug 2026	EVAc pilot, Salisbury and Mildenhall	The lifeboat's seaworthiness; a stumbling pilot raises both the residual estimate and the delay risk
Sep 2026	Business migration rate	Above 5,000 a week would shrink the residual band; the ~2,000 of early 2026 cannot clear half a million lines
31 Oct 2026	The October decision point	Residual above one million with the rate below 60,000 makes the deadline untenable; below half a million and falling, with EVAc proven, effectively confirms our 72% scenario
31 Oct 2026	Free voice-only migration window closes	The last carrot expires; what remains after this is the genuine hard core
2 Nov 2026	Ballyclare and Kenton Road exchange closures	The tail-management dress rehearsal, already slipped a year over fewer than 300 lines
Ongoing	Any serious telecare incident; Ofcom's BT and Three investigations	The dominant single trigger. The 2023 precedent says industry reacts within weeks, and so will our probabilities

Where the instruments publish

The live tracker, updated monthly against these thresholds, runs at broadbandswitch.uk, and the February 2027 self-scoring against page 26's criteria publishes whichever way it lands.

References • 1 of 2

APA 7th edition, numbered as cited in the text. All URLs verified 12 June 2026. Where official and industry data differ, both appear in the text with dates and scope.

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How to weigh *every figure* here

This report names a source and a date for every number, but they do not all carry equal weight, so each key figure sits in one of the four grades below. The rule has been the same throughout: where a claim rests on a single party's word, we say so plainly rather than dress it as settled fact. Two figures earn that candour by name, the often-quoted 1% of UK electricity, which is Openreach's own June 2026 statement rather than an audited measurement, and the 35.2 million peak of the year 2000, which rests on a single government series.

The four grades, and where the headline numbers fall

GRADE	WHAT IT MEANS	EXAMPLES IN THIS REPORT
Confirmed	Traced to a named primary source: Ofcom, Hansard, DUKES, or audited company results	The WLR price steps; the £23.8m and £17.5m fines; the 2,600 incidents (Hansard, 2 June 2025)
Corroborated	Consistent across two or more independent reports on different dates	The 1.9 million lines left on 11 June 2026; the 44,000 a week run rate
Single-source	Rests on one party's statement, and is flagged as such in the text	The 1% of UK electricity (Openreach); the 35.2 million peak of 2000
Derived	A calculation or forecast, shown with its workings so it can be checked	The 150,000 to 450,000 residual; the copper value below

What the retired copper is actually worth

Openreach expects to recover up to 200,000 tonnes of copper as the network is decommissioned through the 2030s, worth around £1.5 billion at 2024 prices (Openreach, via The Guardian, September 2024) and closer to £2 billion at the London Metal Exchange price of about US\$13,480 per tonne on 9 June 2026. It has already taken roughly £105 million up front from recycler EMR under a contract running to 2028. A widely shared £6 billion figure is an arithmetic error: it spreads a one-off advance payment across the entire tonnage, implying a copper price roughly three times the real one. After extraction and logistics the realised total sits below the headline, which is why we grade it derived rather than confirmed.



PLAIN ENGLISH

Why grade our own numbers?

Because the fastest way to lose a regulator's trust is to present a guess as a fact. Telling you how firm each number is, and showing the sums behind the soft ones, is the same discipline that runs through this entire report.

The author, and *the promise* behind the report



Dr Alex J. Martin-Smith CMgr MBA LLM DBA

Alex is the founder of BroadbandSwitch.uk and the SearchSwitchSave network of UK comparison and digital tools sites. His work sits at the junction of consumer telecoms, regulation and plain-English explanation: deep in Ofcom's rulebook by trade, allergic to jargon by temperament. His doctoral research in organisational capability underpins the analytical method running through this report, and his standing rule for everything the network publishes is the one applied here: every figure dated, every source named, every prediction marked.

Connect: [linkedin.com/in/alexmartinsmith](https://www.linkedin.com/in/alexmartinsmith)

About BroadbandSwitch.uk. An independent UK broadband comparison service: postcode-level availability checking across 35+ live providers, a free speed test, plain-English guides, and a verified market directory tracking more than 425 UK ISPs. The service earns commission when readers switch through its links; analysis and rankings are never sold,

and this report was produced without provider involvement or sight before publication.

The promise. The forecast in these pages is marked against its own published criteria in the first week of February 2027, whichever way events land. The monthly tracker, the corrections log and the scorecard all live at broadbandswitch.uk. Authority is not a claim. It is a habit, kept in public.

TAKE ACTION



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