

All-IP and Exchange Exit Industry Update

December 2025

openreach

Agenda

Openreach update

Juliette Scott- Senior Manager, All-IP and Exchange Exit Programmes

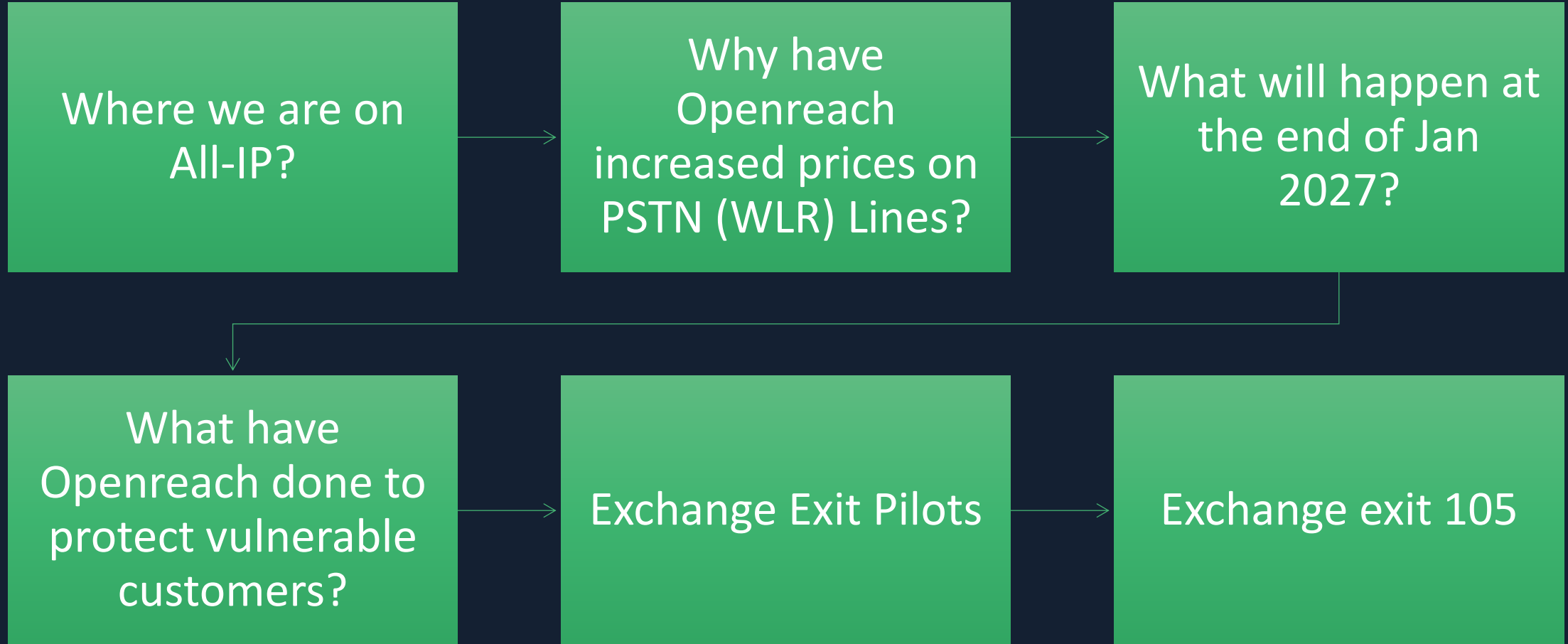
DSIT

Griff Jones- Head of Telecoms Modernisation Team

BT PDPL update

Graham Passmore- IP Migrations Engagement Manager

Openreach Update



All IP programme

Whilst the WLR base is reducing, we need to ensure it moves faster to get to January 2027

A reminder why WLR / PSTN is being withdrawn

- Notice given in 2017/18
- The PSTN is ageing and becoming increasingly difficult to maintain – that's why a clear plan to close it by Jan 2027 is needed
- Fibre much more reliable
- Greater speeds available on fibre
- Upgrading the UK infrastructure, future proof services
- Power and energy savings – good for the environment

Progress

- 3m WLR customers remain
- Migrations have been slowing through 2025
- Some communication providers remain non engaged with no movement in their base
- Industry continues to learn how to engage end customers from pilots including Prove Telecare, and Exchange Exit
- Concern that migrations will be left to end of programme resulting in engineer resource contention

Feedback has told us

- “We don't believe the date will stay; we expect another extension”
- “We don't want to move, WLR is cheap, and we have to pay to migrate, we'll wait until you cease our lines”
- “End customers aren't aware – Openreach you need to do more to communicate to our customers”
- “We need to keep people safe”

PSTN (legacy services) final year approach

We have plans for 2026 to encourage migrations before the January 2027 deadline

January 2027 remains the last customer off date • Notice of withdrawal provided in 2018 • Maintaining legacy network is not an option • While we withdraw legacy, we are investing in UK infrastructure, deploying fibre and future proofing services. 20m+ FTTP footprint and growing at 1m+ per quarter	Enablers in place to support migration of all lines • Alternative access products available for all lines • Prove Telecare launched to ensuring migration pathways exist including supporting vulnerable, telecare and CNI use cases • DSIT charters supporting safe migrations	Contract changes and direct end customer contact • WLR contract on rolling notice period from January 2026 • End customers remain the responsibility of the CP • Openreach aim to contact non-engaged CP end customers to ensure they have been informed of the need to move • Explore how can further share data and insight to drive migrations	Quarterly increase in pricing supported by additional commercial offers • WLR and ISDN price increases each quarter from April 2026 • Commercial offers already in place to support moves • Launching offers to support migrations • Forward notification of price increases for 2026	Voice lines remaining after January 2027 will be moved to an emergency voice overrun service • WLR3 single lines remaining from 1 Feb 2027 <i>where Openreach deems there to be customer risk</i>, will be migrated from legacy lines to a new basic emergency overrun service with limited features to ensure access to 999 and telecare • Focus is to protect critical voice access; will not support broadband • ISDN will be ceased
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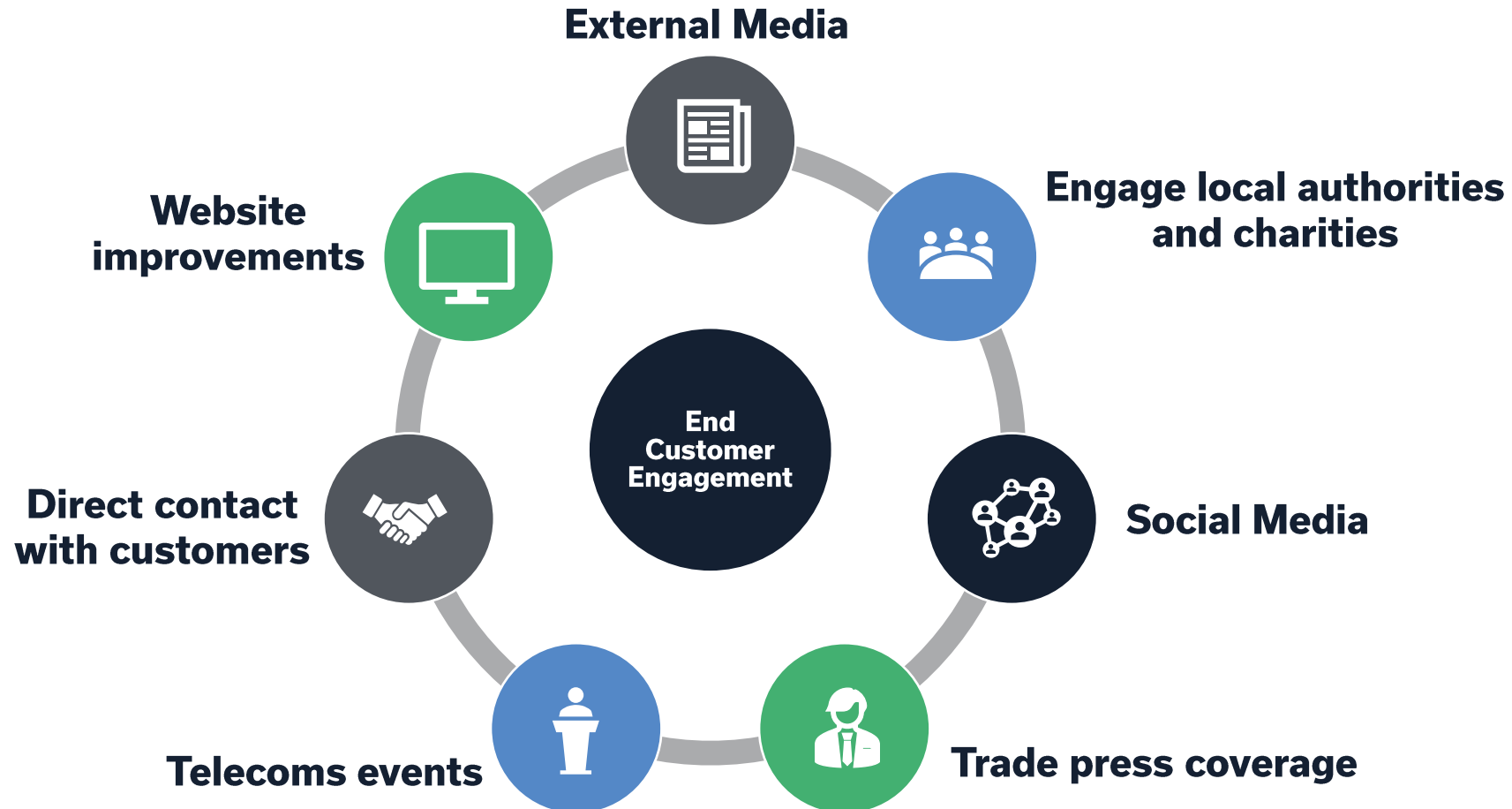
Key takeaways

The PSTN is closing in 2027, and Openreach have shared the plan to get to WLR withdrawal

- The PSTN is ageing and becoming increasingly difficult to maintain – that's why a clear plan to close it by Jan 2027 is needed
- Migrations need to increase from now to February 2027
- Openreach are sharing plans now to give CPs the chance to plan and accelerate migrations before price rises and ultimately customers are migrated to a basic voice product at a higher price
- Openreach are offering incentives on migrations to SOGEA to enable easier migrations for end customers where available
- The emergency voice access service (EVAC) that will operate from February 2027 (and will be subject to limited pilot in May 2026) is a voice only product
- EVAC will only support very limited Call Network Features, over 50 of the current features will not be available once the end customer is migrated (including call direct and call minder)
- There is no emergency product for ISDN2, ISDN30, multiline services as well as exchange-based services such as remote call forwarding and redirect – these are likely to be ceased on 1 February 2027

Openreach engagement with end customers

As we approach the final 12 months before WLR withdrawal, CPs are responsible for driving migration activity with their customers. To support CPs in increasing awareness and engagement, Openreach will be delivering a number of initiatives throughout 2026.



Prove Telecare

Helping to Safeguard vulnerable telecare users when migrating services to the IP platform.

Following a successful pilot, Openreach have officially launched the Prove Telecare product on **16 October 2025**.

This essential product help ensures the crucial protection and safety of vulnerable customers as they transition from the legacy analogue network to the modern digital IP platform.



Prove Telecare (SVR) pilot ran from Feb 2025 – Oct 2025



Worked closely with multiple CPs



Over 1,500 orders completed successfully during the pilot



Officially launched the product to industry – 16 October 2025



Exchange Exit Update

Consolidating and simplifying the Openreach network as we move away from dated copper services into a new Full Fibre digital age

Latest updates:

Pilot Exchanges:

- **Deddington** exchange exited – 1st exchange of the programme. Huge milestone for Openreach and the Industry - provided many learnings to take forward into the rest of the programme
- **Kenton Rd & Ballyclare** – Business lines have been ceased after thorough checking for CNL and vulnerability from Openreach and CPs. Ongoing discussions with key stakeholders in Ofcom, DSIT and the OTA2 on best approach for managing remaining consumer lines and other remaining assets.
- Openreach have been supporting CPs in driving awareness and engagement with end customers over the last 6-9 months -letter drops, community visits, door knocking, engagement with councils / local orgs/charities etc

Exchange Exit (remaining 105 Exchanges):

- Our ambition is to exit remaining 105 non-enduring exchanges by December 2030
- Exchange Exit programme is split into 4 phases April 2028 (12), April 2029 (20), April 2030 (31), December 2030 (42)
- Each Phase goes through 4 important stages: **Plan | Build | Migrate | Recover**
- We are working closely with CPs to support them in this transitional period ensuring that active services are migrated to the enduring exchanges in a safe and controlled manner with minimal disruption to end customers

Thank you

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BT Business

PSTN switch-off

Update Dec 25

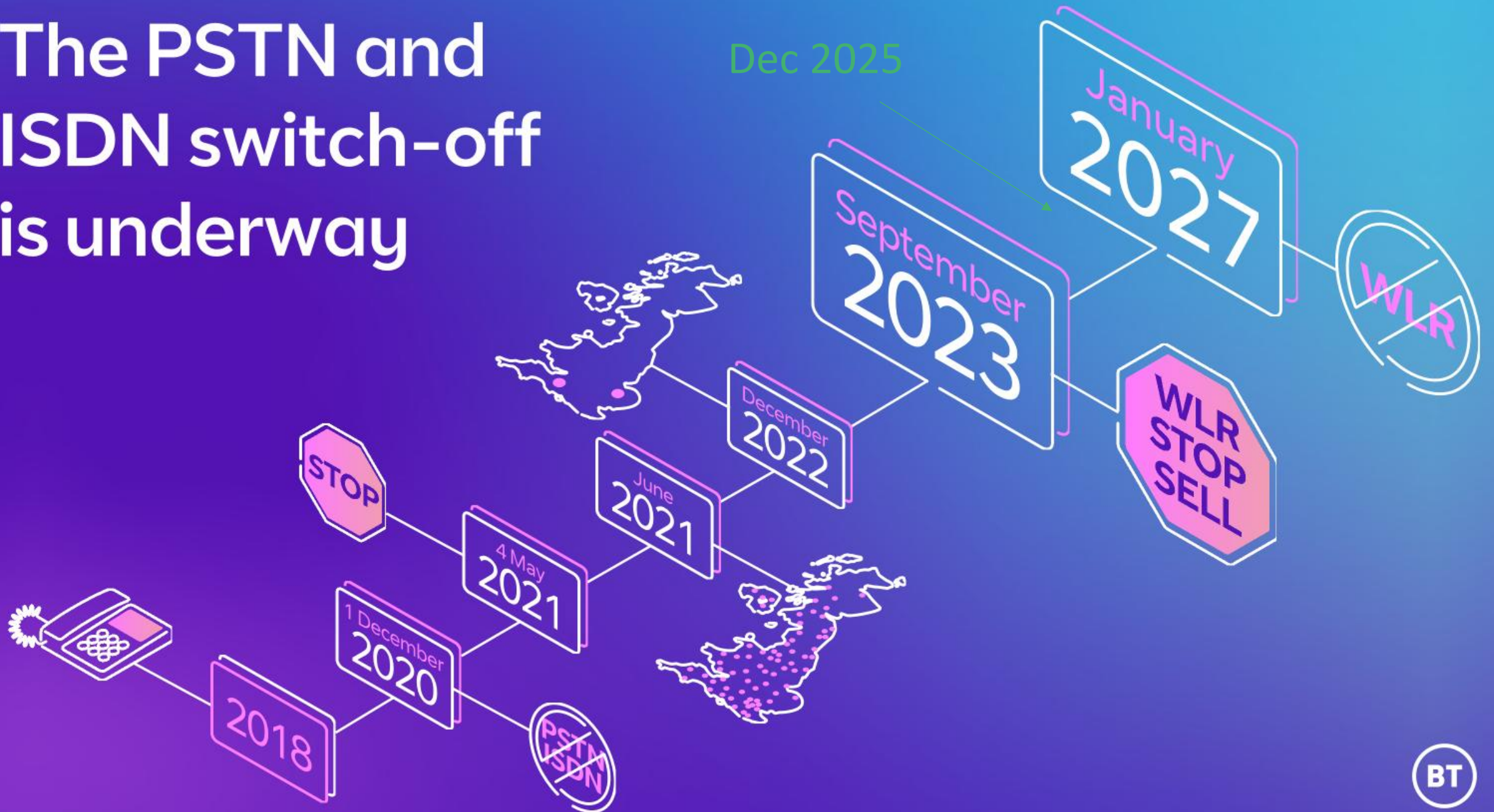


The Journey

BT Business - Pre-Digital Phone Line

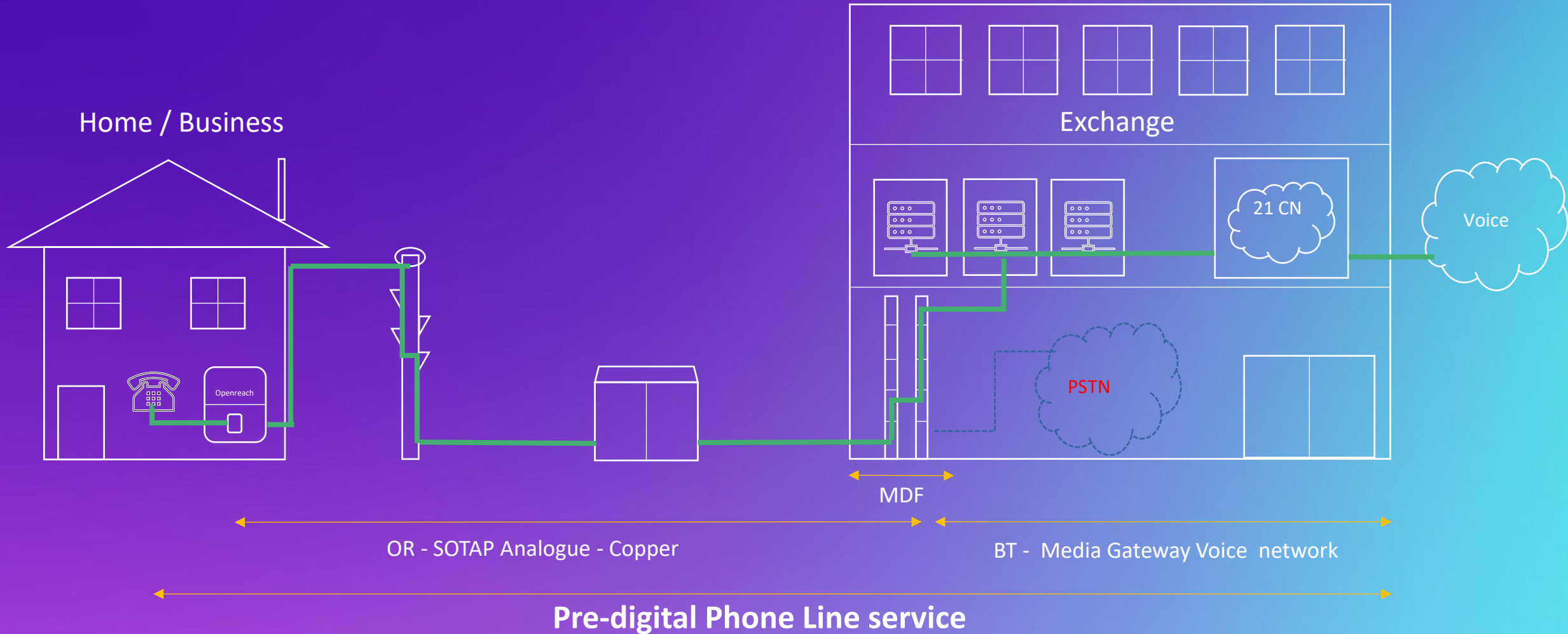
BT Business - Protective Migration

The PSTN and ISDN switch-off is underway





Business - Pre Digital Phone Line (PDPL)





Business - Protective Migration

Due to the increasing failure of the ageing PSTN network,

BT Business has been urging its customers to safeguard their services by moving off the PSTN service to IP solutions by **31 December 2025**.

BT Business customers who have not placed a confirmed All IP migration order or cease by **31 December 2025** will become eligible for **BT Business Protective Migration**.

Protective Migrations will commence **January 2026** to meet the commitment to extract all BT Business lines off the PSTN by **January 2027**

Protective Migration does not cover all pathways & Products

What happens to Business lines in Protective Migration?

Where eligible, if an All-IP alternative replacement service has not been contracted, Protective Migrations will commence in January 2026 and throughout the year.

Line type	What happens
Single line PSTN with no legacy broadband	BT will migrate single lines to Pre-Digital Phone Line (PDPL) solution from January 2026.
Single line PSTN with legacy Business Broadband (ADSL or FTTC access), broadband has been inactive for 12 months	BT will migrate the single line PSTN to PDPL, Business Broadband will be ceased prior to migration to PDPL. - Where customers engages (within 30 days) the Broadband will be restored while All-IP alternatives are provided. - Where customers do not engage within 30 days, the broadband will be ceased, and the PSTN migrated to PDPL through Protective Migrations.
Business Broadband (ADSL or FTTC access) with BT PSTN where the PSTN and Broadband have both been active for 12 months	
Business Broadband (ADSL or FTTC access) with BT PSTN, where the PSTN has been inactive for 12 months	BT will upgrade the Business Broadband to SoGEA or SoADSL. The PSTN voice line will be ceased.



Call to action

Act Now to Avoid Price Rises:

Openreach's announcements make it clear—customers can avoid future price increases by switching to **BT Business All-IP alternatives now**.

Avoid Protective Migrations:

Whenever possible, choose elective migration options through contracting rather than relying on protective migrations.

Urgent Action for Certain Services and products:

ISDN, Featureline, and PSTN Multiline and some broadband products cannot be preserved through protective migrations.

These require **contracting and upgrading quickly to IP alternatives**, or they will be **ceased after January 2027**.

Speak to your account manager now to control your migration to All-IP