

BSIA All-IP UPDATE

Nov meeting updates

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THE VOICE OF THE PROFESSIONAL SECURITY INDUSTRY



Digital Voice transition

THE VOICE OF THE PROFESSIONAL SECURITY INDUSTRY

Digital Voice transition in the UK

Purpose and Objectives Of the Digital Phone Switchover Function

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To be a central and authoritative source of information primarily for consumers, business and Government on the migration to IP voice; enabling improved communications; reducing the burden on individual CPs thereby leading to a more efficient migration of customers.

- To be a commercially neutral yet authoritative voice representing the telecommunications sector to key stakeholders on the migration to All-IP
- To highlight best practice to key stakeholders and encourage them to take timely action to smooth the migration
- To help act as a conduit between the telecoms sectors and end-users of All-IP services

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TechUK has been appointed as the lead trade body for the overarching switch over with a particular interest in IT

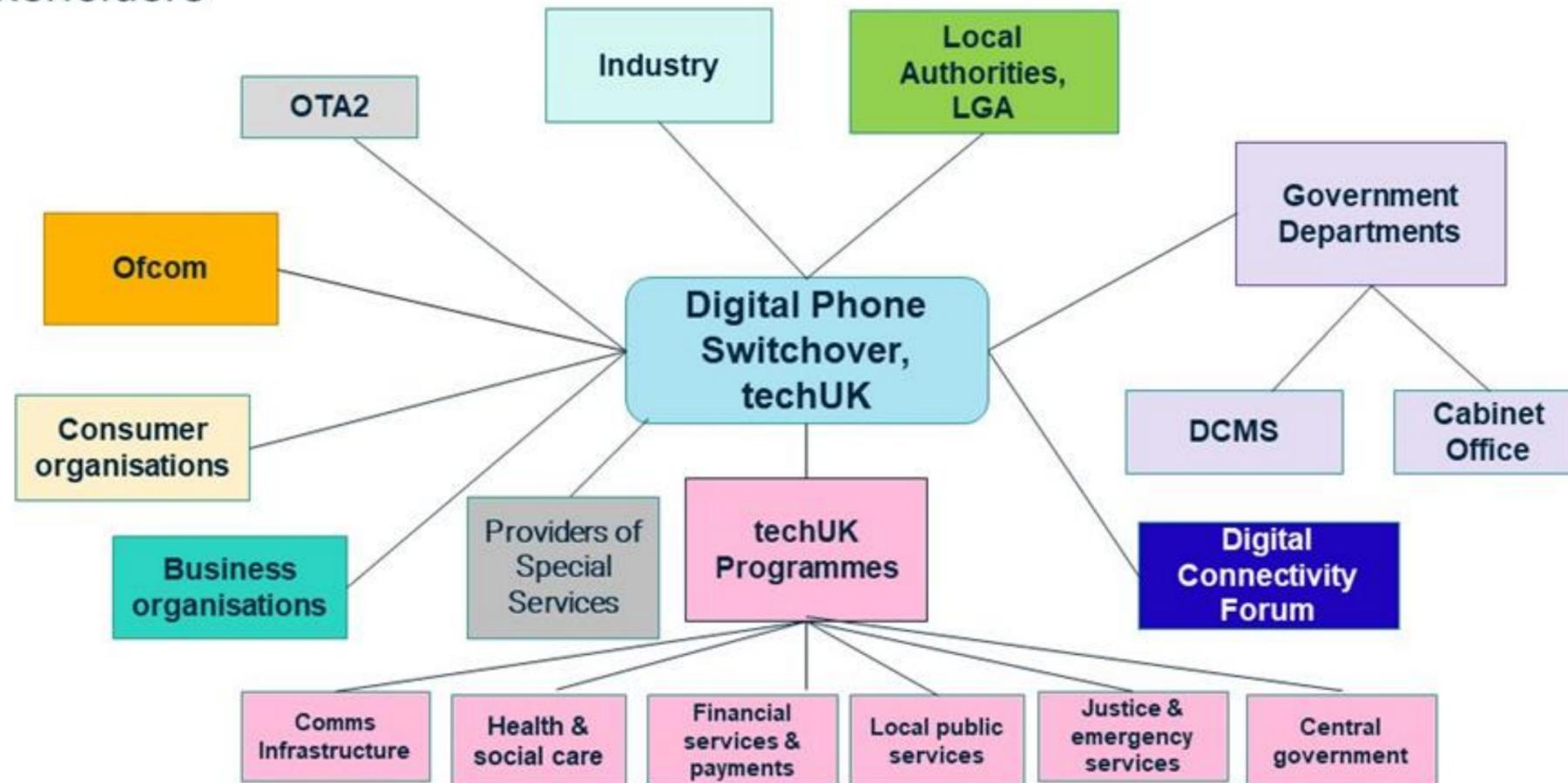
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Digital Voice transition in the UK

Digital Phone Switchover function

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Stakeholders



Today's situation and challenges

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The telecoms sector working in isolation will not be able to overcome:

- Where the customer is not getting a like for like change in products (reliance on special service providers)
- Where the CP is seen as upselling/ scam
- Where customers are not engaging or refusing to move
- Where larger public sector/ CNI customers are looking for Government involvement and reassurance that the program is legitimate and action needs to be taken
- Where CPs may continue to sell analog services on extended contracts
- Where special service providers do not adequately prepare/ continued sale of analog kit

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Engagement:

Industry sectors awareness

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Sector specific and regional approach

- Raising awareness through sectoral events and briefings – eg Preparing Local Authorities (<https://www.techuk.org/what-we-deliver/events/digital-phone-switchover-preparing-local-authorities.html>) or Water Innovation (<https://www.techuk.org/resource/event-roundup-techuk-water-innovation-series-all-ip-solution-showcase.html>)
- Adopting a regional approach to outreach – either through working with Combined Authorities to maximise message spread locally and partnering on delivery goals or hosting regional roundtables and standalone focus sessions
- Working with other trade associations and bodies to host briefings and ensure their membership base is aware and taking steps to prepare.

Links:

[Digital Phone Switchover - preparing local authorities \(techuk.org\)](https://www.techuk.org/what-we-deliver/events/digital-phone-switchover-preparing-local-authorities.html)

[Event roundup: techUK & Water Innovation Series: All-IP - Solution Showcase](https://www.techuk.org/resource/event-roundup-techuk-water-innovation-series-all-ip-solution-showcase.html)

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Engagement:

Industry sectors preparedness

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State of readiness of some sectors may be sub-optimal and barriers to migration may impede progress

- Act as a link between industry and central & local government, Ofcom, consumer/business organisations, and providers of special services for awareness raising and issue management.
- Look holistically at the different sectors and prepare an overview on the state of preparedness of each industry sector by organizing workshops and events with the key stakeholders to identify and work to resolve blockers to the migration
- Encourage pro-active engagement by Local Authorities, third party suppliers of services and devices and other relevant stakeholders that will be impacted by the migration
- Consistency of messaging and involving the relevant Government departments, regulatory bodies and key stakeholders within each sector to optimize awareness and gain momentum in preparing for the migration.

Awareness raising: Communications

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Ensuring the appropriate level of awareness of the migration and impact to end users and supply chain using the PSTN

- Consistency of messaging and common language usage across different media.
- Upgrade [Future of Voice website](#):
 - For everyone - make it interactive and dynamic with latest news.
 - For end users - ensure messaging on the website is informative and provides reassurance.
 - For industry - create a portal containing white-branded common collateral that can be used by CPs to re-brand for their own purposes.
- Developing material to be hosted on the [techUK website](#) and expanding the series of events and briefings to continue to raise awareness
- Standardising communications going out to stakeholders (e.g. Councils, telecare sector) and working with LGA/ local authorities to encourage the provision of the right information to their consumer and local business communities and encourage proactive engagement.

Links:

[Future of Voice – Homepage](#)

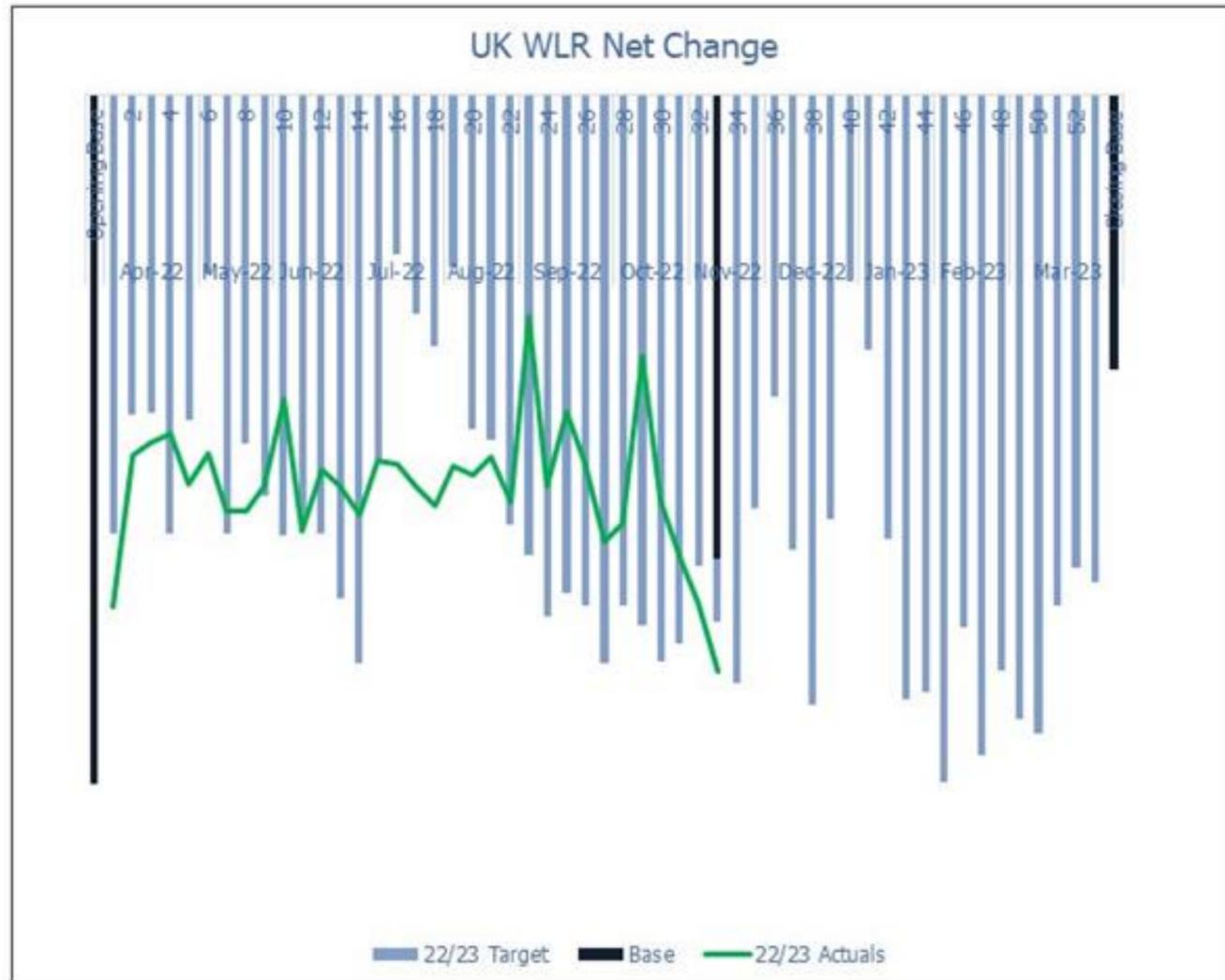
[Digital Phone Switchover \(techuk.org\)](http://techuk.org)

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Digital Voice transition in the UK

UK WLR Base Movement

FY23 Goal – Reduce the WLR Base by 23%



- Last year we reduced the WLR base by **14%**
- This year we're looking to **improve** again and reduce the base by **23%**
- We started the year **better** than last year; but had a slower second quarter and are slightly **behind** target
- Still scope for current migrations onto legacy products to be on IP products to avoid future double-moves.



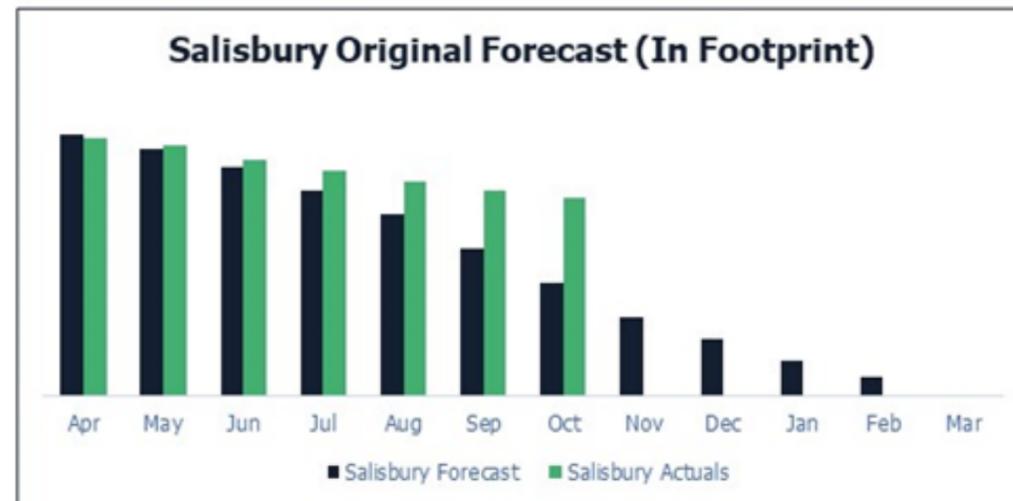
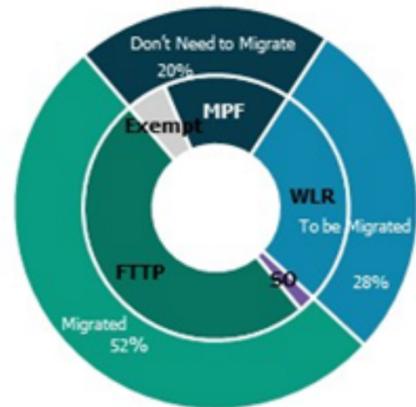
Currently behind where they would like to be but hoping to recover

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Salisbury and Mildenhall Withdrawal

Gap is growing against CP's forecasts showing increasing risk of service interruption for customers

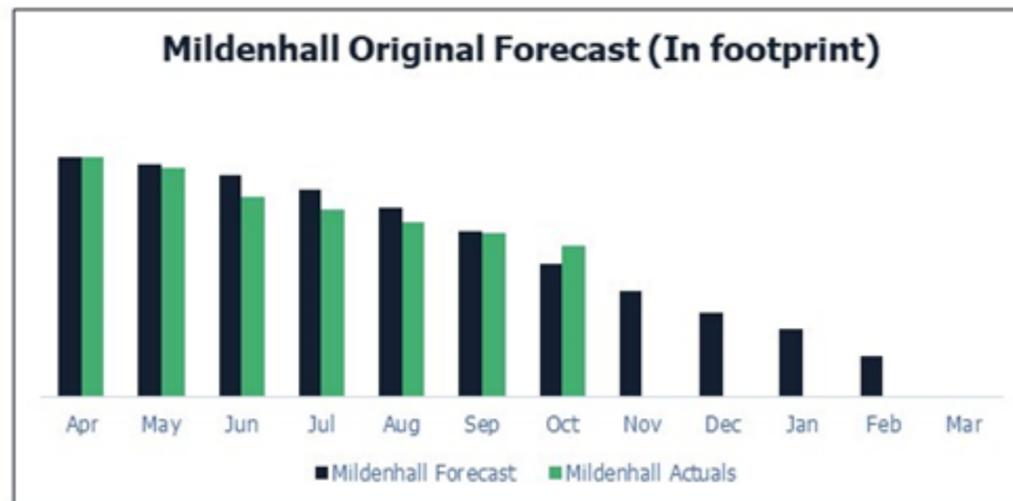
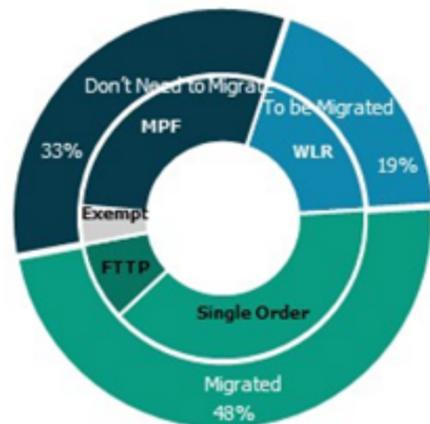
Salisbury



- Significantly behind plan after 6 months original of CP forecasted plan
- Majority of lines in trial sites covered by a valid on-track forecast
- 36% of CPs in the trial sites are Non-engaged

We will report next meeting against updated forecast

Mildenhall



Trial Sites

Digital Voice transition in the UK

Supported Migrations in Salisbury and Mildenhall – in 5 steps

Step	Apr 2022	May 2022	Jun 2022	Jul 2022	Aug 2022	Sep 2022	Oct 2022	Nov 2022	Dec 2022	Jan 2023	Feb 2023	Mar 2023	Apr 2023
Step 1	CP forecasting	★											
Step 2				End customer postcards									
Step 3						CP re forecasting including exemption requests	★						
Step 4							Email of intentions with status ¹ ★	Off track emails ² ★					
										Postcards ³ ★	Postcards ³ ★	Final Postcards ⁴ ★	
Step 5													End of contract ★

1 – Email of intentions with status – Email to confirm Openreach supported migration process, including criteria for end customer postcards

2 – Off track emails – sent to any CP at the beginning of the month where their actual base is above forecast

3 – Postcards – to be sent to the live WLR end customers (minus agreed exemptions) where the CP's base is above their forecast by 5% or more; or has not submitted a forecast to Openreach

4 – Final postcards – to be sent to all live WLR end customers (minus agreed exemptions) who are at risk of termination – this applies to all CPs, no matter whether the CP is on track, or engaged or not.

All IP support for migrating lines with non-standard use cases

Updated policy decisions for developing non-standard product variants

Product variant: Technology:	Hotsites	Uninhabitable locations	Temporary lines
SOGEA	Migration - Delivered 24/05/2022 R4950 New line provide - Delivered 24/05/2022 R4950	Migration - Delivered 24/05/2022 R4950 New line provide - Delivered 17/09/2022 R5050	Targeted 2023/24
FTTP	Targeted 2023/24	Targeted 2023/24	Targeted 2023/24
SOTAP	Targeted 2023/24	TBA	New - Will not be developed Industry briefing published October 2022.

In addition, in FTTP Priority Stop Sell exchanges, Openreach will accept orders for SOGEA Uninhabitable, Hotsites (and Temporary when available), where FTTP is also available at the premises/location – Delivered 17 September 2022 R5050.

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Product Roadmap – November 2022 to April 2023

Product Type	November 2022	December 2022	January 2023	February 2023	March 2023	April 2023
WLR				8 February - FTTP Priority Exchange Stop sell - Quarterly Tranche Notification		Contract Termination in the Trials
FTTP		1GB+ Speed Tiers (Pilot) Shallow Build Trial (Pilot) API + Google Cloud Platform CP Reporting solution (Launch)	FTTP Advanced Managed Install (Q4 Launch)			Additional Services – (Named Engineer, SSRAMS, OOH Appointments) (Q1 Launch)
SOGEA	SOGEA Named Engineer (Pilot)				Advanced Managed Install (Q4 Launch)	SOGEA Named Engineer (Q1 Launch)
SOTAP	Pilot will continue throughout this period and will end once 400 lines are operational. Launch Q2 2023/24					

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This schedule is subject to change. Updates will be provided at the CFPCG

Notification of Stop Sell implementation Tranche 10 and Tranche 6 go live

Latest tranche updates were notified on 12 October 2022

Tranche 6

51 FTTP priority locations went live (stop sell) on 1 November 2022

Tranche 10

32 new FTTP priority exchanges were announced with 12 months' notice and will be activated in tranche 10 which will go live on 9 November 2023.

Link to stop sell exchanges:

<https://www.openreach.co.uk/cportal/products/product-withdrawal/wlr-withdrawal>

- Total number of FTTP stop sell exchanges notified – 672
- 6.1m potential THP in Trial and tranches 1a, 1b and 2-10 exchanges
- 8.9 million homes and businesses now have access to our Ultrafast full fibre network
- Next quarterly tranche notification in February 2023

FTTP Priority Stop Sell Overview

Correct at 7 November 2022

	Tranche	Date Implemented / due	Exchanges	Potential THP*
Active Stop Sell	Salisbury	01 December 2020	1	27k
	1a	29 June 2021	13	166k
	1b	13 October 2021	94	1.1m
	2	13 October 2021	26	337k
	3	25 January 2022	47	427k
	4	29 April 2022	69	711k
	5	02 August 2022	67	444k
	6	01 November 2022	51	297k
FTTP exchanges under stop sell			368	3.5m
Under Notice	7	08 February 2023	86	720k
	8	09 May 2023	71	556k
	9	08 August 2023	65	446k
	10	09 November 2023	32	288k
	TBD	Date to be determined	50	635k
FTTP exchanges under notice			304	2.6m
FTTP exchanges under stop sell or notified			672	6.1m

New FTTP stop sell exchanges are notified 12 months in advance, on a quarterly basis

*Reflects potential total homes and businesses passed (THP) that FTTP could be built to in those locations

Digital Voice transition in the UK

Key Takeaways

Trials and UK Numbers

Gap is growing against CP's forecasts showing increasing risk of service interruption for customers

41% of CPs have now submitted a re-forecast.

36% of CPs in the Trial sites are currently classed as non-engaged.

All IP Migration Planning

Stop sell rules apply at premises/NAD level not just exchange level

Stop sell rules do not apply if premises/NAD does not have access to FTTP, SOGEA, SOGfast

Supported Migrations

Monthly CP Status review

Planned end customer postcards in January, February and March 2023

Non Standard Lines in All IP

Openreach has decided not to develop a Temporary product variant for SOTAP ([Briefing: GEN075/22](#))

Product Roadmap

FTTP: December'22 - planned launch of CP reporting via API + Google Cloud Platform, along with pilots for Shallow Build Trial and 1gb+ speed tiers.

SOGEA: Planned launch of 'Advanced managed install' in Q4 (2022/23), followed by Named engineer in Q1 (2023/24).

SOTAP: Expected to move from pilot to launch by Q2 2023/24 once 400 lines are operational.

Stop sell

Tranche 6 - FTTP Priority Exchange locations went live on 1 November 2022

Tranche 10 - FTTP priority exchanges have been announced which will go live on 9 November 2023

Next quarterly tranche notification due in February 2023