
The Big PSTN Switch-off: Are UK businesses aware and prepared?

Analysis of Business Awareness,
Preparedness, and Recommendations

A report by Gamma Communications
in partnership with Cebr



The upcoming decommissioning of traditional Public Switched Telephone Network (PSTN) lines by Openreach in December 2025 is a once in a lifetime technological shift that will impact businesses across the United Kingdom.

This white paper is written by Gamma Communications and is based on a recent survey of business technology decision makers (commissioned by Gamma and conducted by Opinium), with survey design and analysis conducted in partnership with Cebr. It aims to provide a thorough analysis of the current levels of awareness and preparedness among UK businesses, highlighting the gaps and discrepancies that exist and makes evidence-backed recommendations for those impacted by this compelling event.

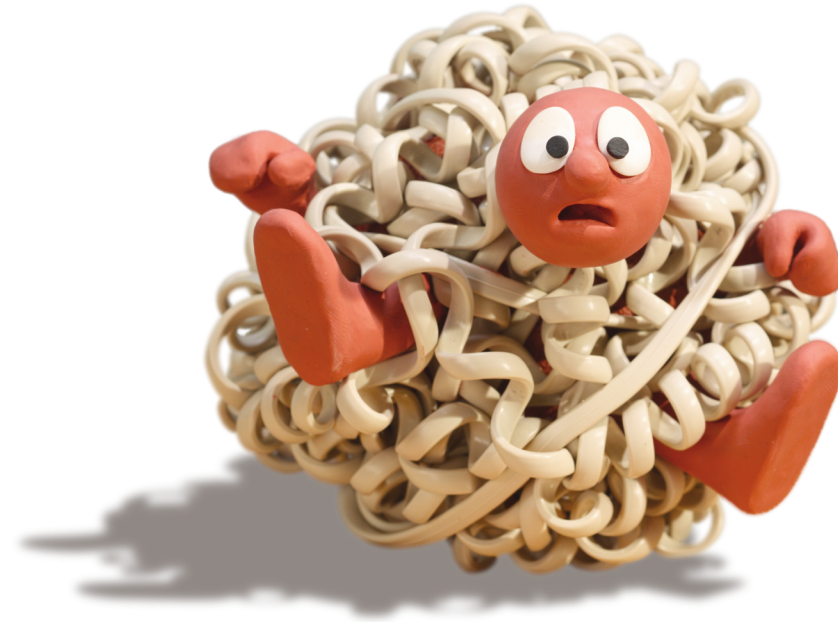


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1. Introduction

The Big Switch-off of the PSTN network in December 2025 is a technological transition that requires everyone to act. Despite this, our survey data indicates a lack of awareness and preparedness among UK businesses, this document looks at the issues raised by our research (commissioned by Gamma and conducted by Opinium in partnership with Cebr) and offers actionable recommendations.



2. The Awareness Gap

2.1 Overall Awareness and its Implications

The data shows that nearly one-third of UK businesses are completely in the dark about this critical technological shift. For these organisations, the lack of awareness could translate to severe disruptions in business operations and even potential loss of clients.

2.2 Awareness Discrepancies by Sector, Technology

A granular examination of our survey data reveals that awareness varies significantly among different sectors and sizes of companies. Moving to a cloud-based communications platform is one alternative to the use of PSTN lines for voice communications. The level of awareness among businesses that use cloud-based communications systems was 67%, whereas only 54% of people who stand to be directly impacted, those who use PSTN as their voice communication system, are conscious of the switch-off.

This indicates that the businesses most vulnerable to the upcoming technological change are also the least prepared. This could result in a competitive disadvantage, as less aware businesses may face service interruptions or increased costs associated with a rushed transition.

2.3 Regional and Industry-Specific Awareness

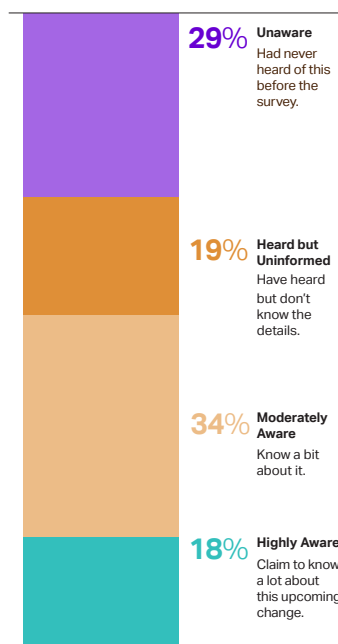
Our survey identifies considerable regional and industry-vertical specific disparities. For instance, businesses in Wales exhibit the lowest awareness at 29%*, whereas those in London and Southeast England score much higher, at 59% and 47% respectively, which suggests the need for region-specific support. BT's regional digital voice rollout is a great example of this, drawing attention to the impending PSTN switch-off. BT's awareness activities have included call outs to customers and roadshows on the High Street. These activities have prompted both consumers and businesses in rollout regions to take note and prepare for the transition.

The regional differences in awareness could lead to an uneven impact of the switch-off across the UK. Some regions might face more significant disruptions and financial setbacks due to this lack of awareness. In contrast, other regions are more aware and thus more prepared for the transition, potentially giving them a competitive edge. Opting for an all-IP infrastructure not only future proofs your network but also affords you enhanced flexibility, increased operational efficiencies, substantial cash savings, and elevated mobility, thereby making a compelling case for transitioning sooner rather than later.

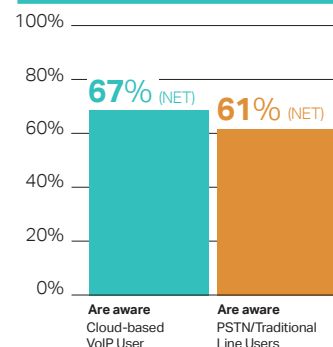
If you're one of the businesses unaware, it makes sense to take this opportunity to future proof your business and take advantage of the benefits of an all-IP solution.

2.4 The Data

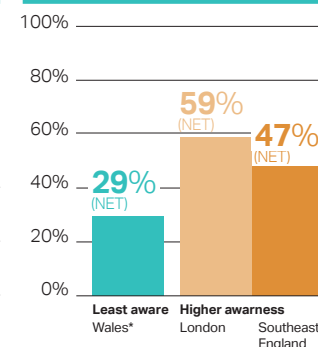
Overall Awareness
(Base: All Respondents – 400)



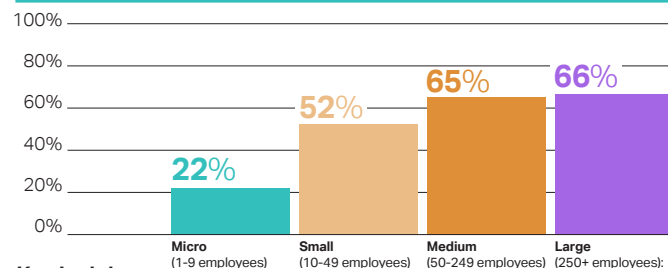
Awareness Among Users of Different Voice Communication Systems



Awareness by Region



Awareness by Company Size



Key Insights

- Varied Awareness:** A significant percentage of respondents, especially (and most concerning) PSTN users, are completely unaware.
- Industry Gaps:** Some industries that heavily rely on voice communication systems are less aware than they should be.
- Size Matters:** Awareness is higher among larger companies, highlighting the vulnerability of smaller businesses to the switch-off.
- Regional Disparities:** There are noticeable differences in awareness levels across regions which could lead to disparities in competitiveness.

*sample size under 30 respondents

3. The Dependency Dilemma

3.1 Overall Business Operations and the PSTN Switch-off Implications

Our survey data highlights a crucial but often overlooked aspect: that the dependency of businesses on PSTN for vital operational functions is alarmingly high. For example, 69% of businesses using PSTN for voice communications rely on PSTN for customer support, and 59% for taking orders or bookings. The PSTN switch-off, therefore, is not merely a telecommunications concern but a broader business continuity issue, extending its reach to areas such as customer service, order processing, and internal communications.

3.2 Dependency Variations Across Sectors and Sizes

The data reveals a significant variance in PSTN dependency across different sectors and sizes of companies. Sectors like public administration and defence*, manufacturing, and construction* display higher reliance on PSTN for multiple operational aspects. This dependency heightens the vulnerability of these sectors to the upcoming switch-off.

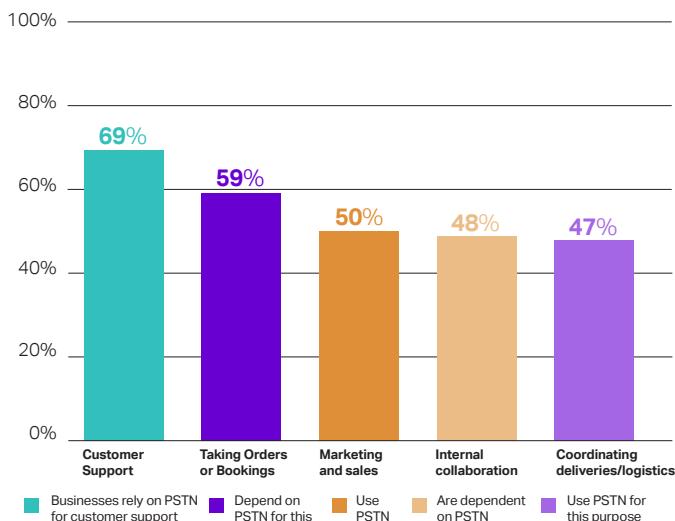
3.2 Industry-Specific Dependencies

The survey results also uncovered industry specific disparities in PSTN dependency. Businesses in the energy and administrative sectors*, for example, show a higher reliance on PSTN for essential operations compared to others such as wholesale, retail, and the arts. Each of these industries, therefore, faces a different set of challenges, risks and knock-on effects if they fail to address the PSTN switch-off in good time.

This calls for a sector specific approach in preparing for the switch-off, taking into account the specific dependency disparities with each of them.

3.3 The Data

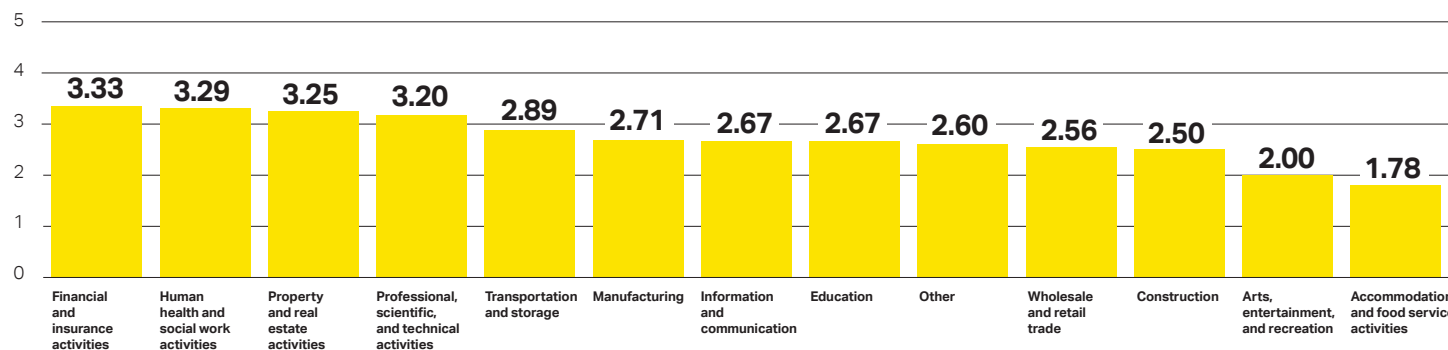
Business Operations Dependent on PSTN
(Base: Those Using PSTN for Voice Communication - 137)



Key Insights

- Multi-Functional Dependency:** A significant percentage of companies are dependent on PSTN not just for voice communications but also for essential business operations.
- Sector-Specific Risks:** Businesses in certain sectors like public administration and defence*, manufacturing, and construction* show higher dependency on PSTN for multiple operational
- Size Matters:** Larger companies are more likely to be dependent on PSTN for diverse operations compared to smaller companies.
- Regional Variation:** Businesses in London and the Southeast have a higher dependency on PSTN for multiple operations compared to those in regions like Northern Ireland.*

Average number of operations dependent on PSTN by industry



*sample size under 30 respondents

4. Beyond Telecommunications

The Big Switch-off extends its impact far beyond telecommunication services. Payment terminals, alarm systems, elevators, are at risk. Our report highlights the lack of planning in these edge cases meaning businesses must broaden their scope of preparation beyond just telecommunications.

The implications of the Big Switch-off go well beyond phone calls and internet connectivity. Consider alarm systems, which are pivotal for safety and security. Should these systems fail due to the switch-off, the risk of theft or other security incidents could spike.

Elevators are another concern. In many cases, emergency phones in lifts are connected via PSTN. If these fail, it raises a significant safety issue.

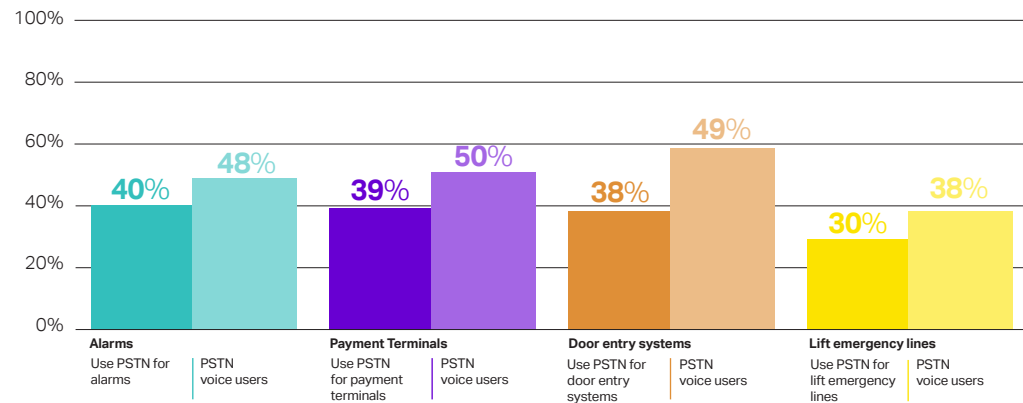
When we talk about payment terminals, think about every card transaction you make at a shop, café, or even a parking meter. If these terminals rely on PSTN and aren't updated in time, businesses won't be able to process payments.

The data reveals a large monthly transaction value of nearly £16 billion at risk due to the upcoming PSTN switch-off. This is based on the average monthly transactions processed over traditional PSTN-based Point of Sale (POS) terminals. This figure is calculated using the monthly transactions at the time of the survey multiplied by the percentage of respondents who use PSTN POS and are unaware of the switch-off.

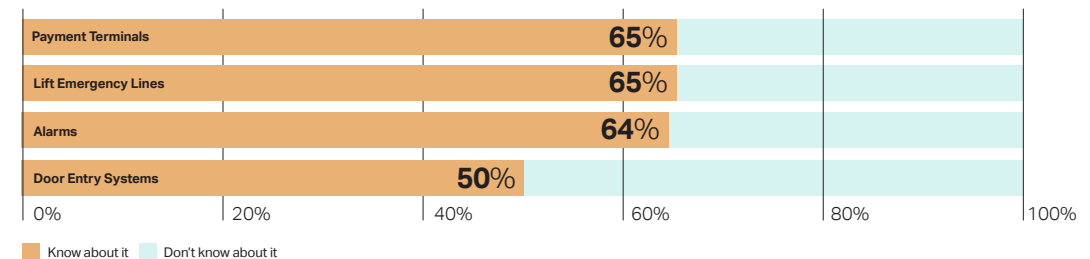
If businesses fail to act, the financial consequences could be costly. We would urge business owners to make their plans in good time and benefit from the advantages of digital, future proof communications, rather than wait and pay the financial consequences.

4.1 The Data

Overall Utilisation (Base: Those Using PSTN for Voice Communication - 137)



Percentage awareness for companies using PSTN lines



Key Insights

- Beyond Telecommunications:** The Openreach PSTN switch-off is not just about making phone calls. A significant portion of businesses relies on these lines for essential services like alarms and payment terminals.

- High-Stakes Vulnerabilities:** Larger companies, especially in sectors like construction* and public administration*, are at a higher risk due to diverse uses of PSTN lines

- Regional Discrepancies:** Businesses in London and the Southeast* as well as Yorkshire and the Humber, which are generally more diversified, face a more complex challenge in migrating from PSTN.

5. The Preparedness Crisis

5.1 Assessing Overall Preparedness

Even for those businesses that are aware of the switch-off, challenges remain. There are several key activities Gamma believes a company will need to undertake to prepare for the switch-off. Despite the proximity of the switch-off date, 67-74% of UK businesses have yet to complete these essential migration tasks. This impact extends even to contacting potential suppliers, with a 29% non-engagement rate.

While awareness is a first step, it's clearly not enough. Businesses that haven't completed essential migration tasks are taking risks. Think about the ramifications: these businesses could experience severe operational disruptions, from not being able to process transactions to failing security systems. Looking next to the businesses not engaging with suppliers: they're not even in the queue for solutions, placing them further behind in what might become a last-minute rush for resources and services – and it will overwhelm systems and providers if many migrations are attempted all at once.

5.2 The Lethargy in Taking Action

As mentioned, even among those who are aware and are PSTN users, a lack of action persists. Knowing about the switch-off is a step in the right direction, but inaction renders this advanced knowledge pointless, and this could have consequences, especially for small businesses.

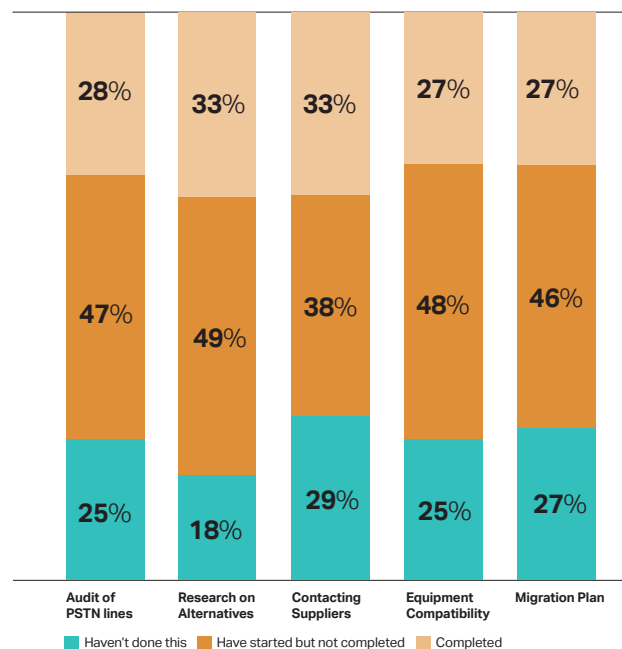
The lack of action seen, especially among small businesses, is cause for concern. When we say 'consequences', we're talking about the potential for business closure, loss of customer trust, and financial losses. Small businesses usually don't have the reserves to recover from a significant operational failure.

5.3 Gamma's Advice on Preparedness Activities

When Gamma suggests activities like auditing PSTN lines, researching alternatives, contacting suppliers, checking equipment compatibility, assessing the impact on PoS systems, and formulating a migration plan, we want to ensure that businesses will survive the PSTN switch-off. Each of these activities is a step in the right direction to business continuity.

5.4 The Data

Preparedness Among Those Aware of the Switch & Using PSTN (Base: 102)

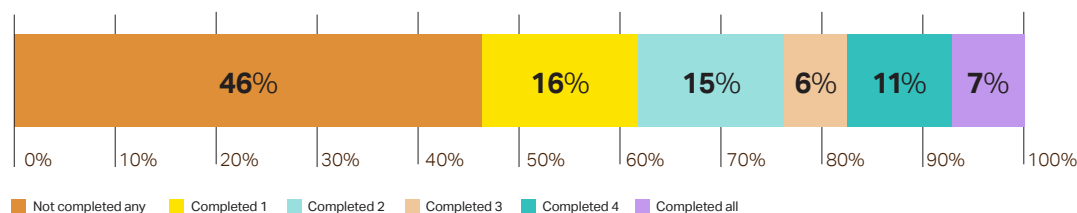


Overall Preparedness (Base: All Respondents - 400)

Key Insights

- Lack of Completion:** A significant percentage of companies have started but not completed essential steps for migration. The Net percentage of companies that have not completed various tasks ranges from 67% to 74%. 46% of companies have not completed any of the tasks at all.
- Supplier Engagement Lags:** Only 33% of companies have researched available alternatives.
- Uncertainty Exists:** A small percentage of companies are "Not sure" about their preparedness, indicating some level of internal communication gap or lack of focus on this macro technological event.
- An audit could highlight lines and services that are active but unused. Identifying these sooner rather than later could lead to cost savings.

% of activities completed across business who have PSTN and are aware of switch-off



*sample size under 30 respondents

6. The Audit Alarm

6.1 The Present State of Affairs

Audits are the first step toward preparedness. Diving more deeply into the audit statistics we raised in the last section; we find that only 25% of UK businesses have completed an audit of their current PSTN lines. Small businesses are particularly behind, with 88% of micro-businesses having not started an audit.*

The audit statistics are alarming. What this means in practical terms is that three-quarters of businesses are in the dark about how deeply integrated PSTN is within their operations. They are effectively flying blind into a situation that could disrupt not just their communications but also essential operational systems.

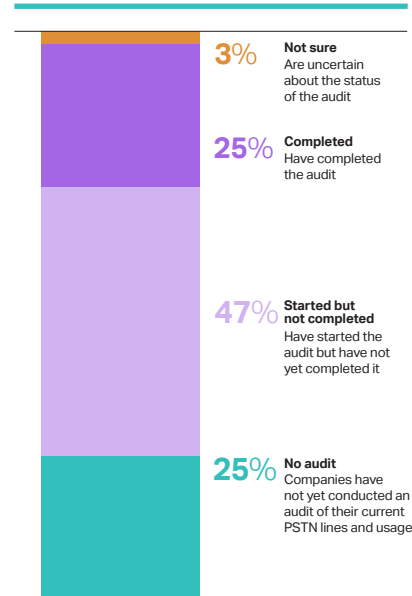
For small businesses, the situation is worse. They are at risk of being caught unprepared for the switch-off. These businesses might find themselves challenged with not just communication failures, but also operational interruptions given their limited resources.

6.2 Importance of Audits for Larger Companies

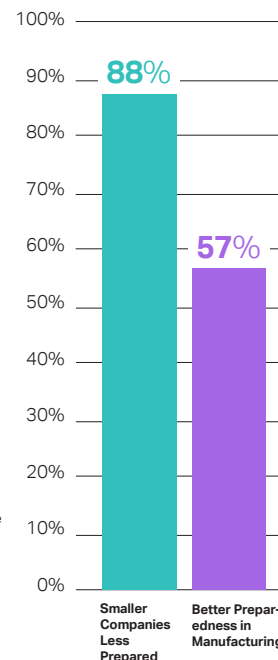
For larger companies, skipping an audit is a risk. Large enterprises often have complex, multi-layered infrastructures that rely on various technologies, including PSTN – and not just for voice. An audit is crucial to understand the scale and scope of the transition needed. Without this baseline understanding, larger corporations face not just operational disruptions but also potential financial and reputational risks that could have been avoided.

6.3 The Data

Overall Preparedness Among Those Aware of the Switch & Using PSTN (Base: 102)



Industry and Size-Specific Insights



Key Insights

- High Level of Incompletion:** A significant number of companies (47%) have started but not yet completed the audit. This could indicate a lack of urgency or resources.
- Small Businesses at Risk:** The data shows that smaller businesses are less likely to have conducted an audit, which could put them at a disadvantage when the switch-off occurs.
- Industry Variances:** Industries like manufacturing seem to be better prepared compared to others, suggesting that some sectors might be taking the upcoming changes more seriously.

*sample size under 30 respondents

7. The Migration Meltdown

7.1 The Status Quo

Our data shows that 27% of UK businesses haven't even started developing a migration plan, and another 46% have started but haven't finished. The lack of forward planning makes businesses vulnerable. For those who haven't started planning, these companies are exposing themselves to significant risks. And for those that have begun but not finished, partial preparation could be as detrimental as no preparation at all. In essence, these statistics point to a potential crisis in business continuity. Without a migration plan, companies could face a range of disruptions, from halted customer service to an inability to process transactions.

7.2 Variability in Preparedness Across Industries and Business Sizes

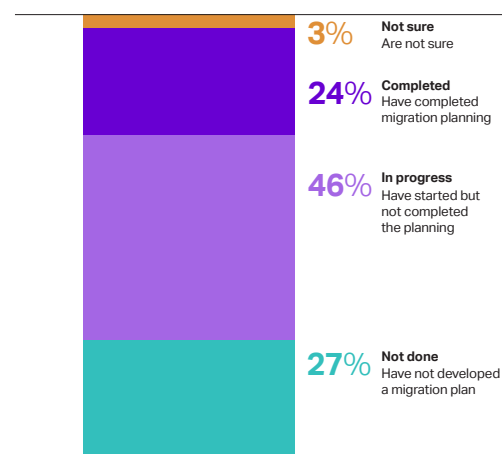
The manufacturing sector* shows the highest level of preparedness, with 43% having completed the planning. In stark contrast, 88% of micro-businesses have no plan in place*.

The manufacturing sector* seems to be ahead of the curve, but even then, more than half are still at risk. For those lagging behind, the consequences could range from operational delays to contract breaches and financial penalties.

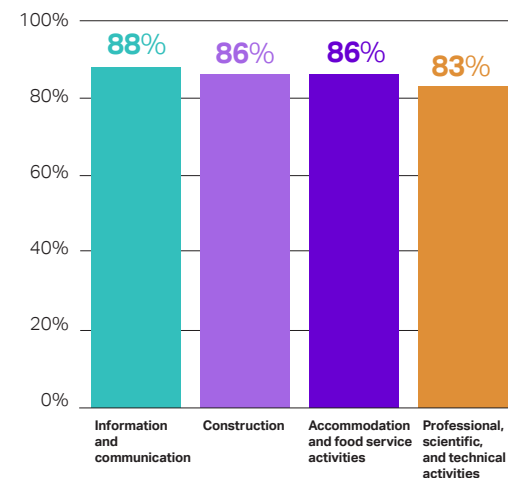
The situation for micro-businesses is concerning. With 88% having no plan in place,* these businesses often don't have the financial cushion or operational flexibility to recover from significant disruptions. The need to raise awareness here is clear.

7.3 The Data

Overall Migration Planning Among Those Aware of the Switch & Using PSTN (Base: 102)

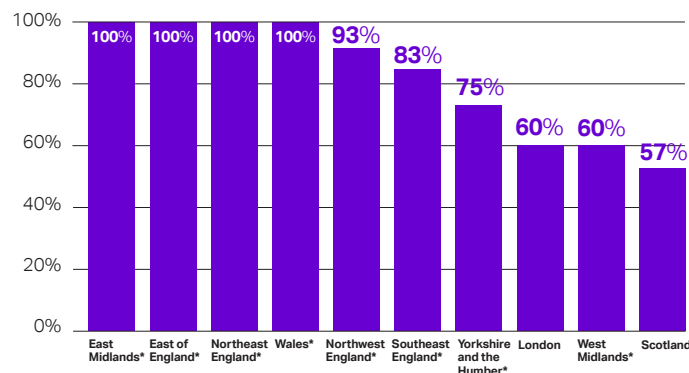


Insights by Industry* (highest % that don't have a migration plan)



Regional Insights

(percentage of respondents who don't have a migration plan)



Key Insights

- Work in Progress:**
 A large portion (46%) is in the 'In Progress' stage. This indicates a level of awareness and initiative, but also suggests that further action is needed.
- Small Businesses Lagging:**
 Sole proprietors and micro-businesses are significantly behind in planning for the migration.*

*sample size under 30 respondents

7.1 Conclusions and Recommendations

Business Owners

Expand the Risk Assessment:

Companies need to expand their risk assessments to include all business operations that are dependent on PSTN and develop contingency plans to ensure business continuity.

Accelerate Transition Plans:

Speed up the adoption of alternative technologies for operations currently dependent on PSTN, especially for sectors flagged by our report. Allocate resources to migration planning.

Improve Stakeholder Communication:

Keep employees and customers informed about changes that may impact PSTN-dependent operations. Engage with suppliers to create and implement plans that mitigate disruption.

Industry stakeholders

Outreach activity:

Small businesses need tailored programs to understand the necessity of audits. Industries with lower levels of awareness, such as the construction and property and real estate sectors, need tailored campaigns.

Regional Initiatives:

The data suggests a need for targeted, region-specific awareness campaigns potentially aligned to Openreach priority exchange activity, Fibre roll-out and BT consumer programmes.

Leverage Industry Best Practices:

Industries that are better prepared can serve as models for others.



8. What does this mean?

Planning is crucial.

If you have questions, Gamma is here to help.
Here are some key questions to ask yourself to get started:

Are you among the **29%** of UK businesses that are completely unaware of the PSTN switch-off, or are you taking active steps to educate your team and stakeholders?

Not only that, but it also makes sense to take this opportunity to future proof your business and take advantage of the benefits of an all-IP solution.

Have you assessed the full range of your business operations that rely on PSTN, especially those critical for customer support and order processing?

What's your backup plan?

Are you considering the "hidden" impacts of the PSTN switch-off, such as its effect on payment terminals, alarm systems, and lift emergency lines? How are you mitigating these risks?

With up to **74%** of businesses lacking complete migration plans, where does your company stand? Have you gone beyond simple awareness to actively engage with suppliers and assess equipment compatibility?

Given that **27%** of UK businesses haven't even started developing a migration plan, do you have a comprehensive and actionable strategy in place, or are you risking business continuity?

So, what's next?

There are several key activities Gamma believes a company will need to undertake to prepare for the switch-off, but our data shows that even among companies that are aware of the switch-off many of these steps have not been completed.

1. Audit of your PSTN Lines

Failing to audit means you won't even know the scale of the problem you're facing. Remember that PSTN isn't just voice, it can include many devices, including Point of Sale. For the **25%** who haven't started and the **47%** who are incomplete, this is an urgent necessity.

2. Start Research on Alternatives

Without exploring alternatives, you're essentially going into this blind. Considering that **18%** haven't started and **49%** are incomplete, a significant number of businesses are at risk.

3. Contact Suppliers

Not engaging with suppliers means you could find yourself without essential services. This is particularly concerning given that **29%** haven't even started, and **38%** are still in the process.

4. Check Equipment Compatibility

For the **25%** who haven't checked and the **48%** who haven't finished, you risk installing new systems only to find they don't work with your existing hardware.

5. Start a Migration Plan

Without a plan, the transition could be chaotic, and you're more likely to overlook important details. The **27%** who haven't started and the **46%** who have started but are incomplete should take this as a wake-up call.

At Gamma, we are here to help identify and overcome your challenges.

We hope the steps identified in this paper help you to start looking at your migration plan and navigating this change. Consider them a roadmap to guide you through the process of preparing for the PSTN switch-off. With proper planning and expert guidance, the transition doesn't have to be a leap into the unknown. For smaller, more simple estates, the answer may be a swift and simple one that leads to embedding new technology created to increase employee and customer satisfaction.

As experts in the field, we can guide you through this transition. Let's prepare for the future, together.

#GoodTogether





Visit our resource page to learn more
or to speak with one of our specialists:

[PSTN Switch-off 2025](#)

[– What You Need to Know | Gamma](#)