

Future proofing later living

Is your portfolio ready for the 2027 copper switch off?



Is your property portfolio ready for the copper switch off?

The switch off of copper phone lines is scheduled for 31st January 2027. By the time this happens it is essential that all later living premises, from integrated retirement communities through to residential care homes, have moved over to full fibre connections. This will ensure a seamless continuation of vital services such as emergency call systems but also to keep the day-to-day smooth running of later living facilities going with all the technology that today's senior homes operators and residents require.

But what is full fibre? Most people will have an understanding that copper phones lines, which were put in by BT many years ago, are being phased out and replaced with fibre connections to provide phone services, and internet services, via a fast internet connection. This is to cope with the level of calls and data relying on the network (capacity) but also to ensure the speed of use (capability) that everyone requires today. In many cases the connection from the exchange to the road of a property will already have been upgraded to fibre, but the connection from the road into premises (kerb to door) has yet to be completed. Only when the connection from the road to the premises has been upgraded will that property have full fibre and be ready for the copper switch off.

The appetite for digital data has grown exponentially over the last 15 years, and the technology that delivers it has become increasingly advanced. The UK's consumption of data has risen by more than 1600% over the last decade and is set to continue this trajectory. The Later Living sector mirrors this rise, with medical technology becoming ever more sophisticated, the introduction of resident apps considered as standard, and, of course, residents desire to stay in contact with friends and family which also contributes to well-being. In addition to this is the ever increasing need to deliver on a net zero strategy – operators and landlords need good connections to run and download the data from energy consumption tools in their buildings.



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In many boardrooms across the industry, C-suite decision makers are thinking about the digital technology needed to keep them at the cutting edge and at a competitive advantage, but in our experience, one item discussed less frequently is the infrastructure required to make this happen. But with the 2027 deadline looming it is crucial to take action now. To get you started we have put together a list of steps to consider:

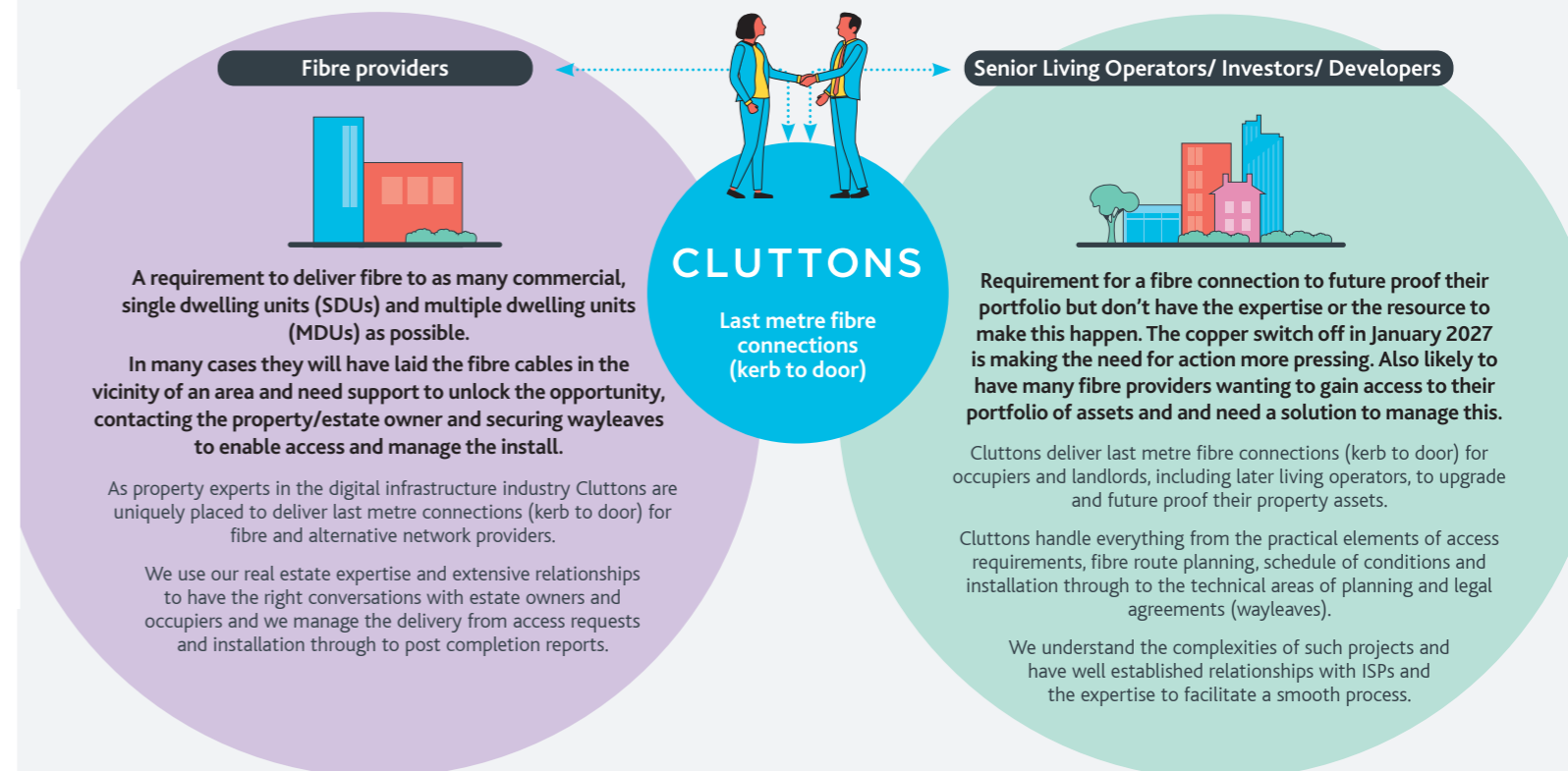
- The first point is to carry out a full analysis of your portfolio to understand the situation for each property / unit – no fibre, part fibre or full fibre?
- You may already be inundated with communication from Internet Service Providers (ISPs) and Alternative Network Providers (AltNets) who all want to gain access to your properties to upgrade them. This communication may be going to your local IT teams, or your Facilities Managers at individual communities/properties.

The initial discussion of what you need and with which provider to go with should ideally happen at board level and then be co-ordinated centrally as this brings economies of scale and a smoother transition.

- Once this decision has been made, you will then need to co-ordinate the project, from access rights, route planning, survey reports, planning approvals where required, wayleaves agreements through to ensuring sites are made good by the provider at completion.

Need help with any of the points above? Cluttons are property experts in digital infrastructure, and we have an extensive track record of delivering last metre fibre connections, kerb to door. We can manage the full process or individual items including negotiating a professional costs contribution.

Last metre fibre connections (kerb to door)



Case study – Connecting Care Homes

How Cluttons helped Anchor Hanover upgrade to fibre across 1,200 properties

Anchor Hanover, one of the UK’s largest care home providers faced a significant challenge during the covid-19 pandemic: inadequate connectivity was making it difficult for residents to stay connected with family and friends at a critical time. Anchor Hanover recognised the need to upgrade from copper to fibre across its large portfolio of over 1,200 properties, but the scale of the project was daunting.

The property team was inundated with requests from internet service providers (ISPs) and alternative network providers (AltNets) to visit hundreds of properties at a time, straining their resources. Even after partnering with a single provider, each property required its own wayleave agreement and installation plan, including managing communications with residents about potential disruptions.

To overcome these challenges, the care home provider turned to Cluttons, property experts

in digital infrastructure, with established relationships with fibre providers. Cluttons’ team of surveyors and project managers worked closely with the chosen ISP to create a comprehensive plan for end-to-end management, including:

- Access management plans
- Route survey plans
- Wayleave agreements
- Asbestos registers
- Survey reports
- Route approval
- Schedules of conditions, including pre condition surveys
- Site visits to ensure planned routes were viable
- Installation management on site, checking for damage and managing communication with residents
- Completion reports

Cluttons also developed a digital tool to streamline communication between the ISP and the care home provider, reducing the risk of unsuccessful meetings and delays caused by miscommunication about access and routes.

As a result of Cluttons’ careful planning and proactive approach, Anchor Hanover was able to proceed with the connectivity upgrade smoothly, with minimal disruption to day-to-day property management and without impacting their own resources. The project’s success has enabled the provider’s residents to access better connectivity, enhancing their everyday lives and well-being and providing Anchor Hanover with full fibre ahead of the copper switch-off which we believe gives them a competitive advantage.



Recent later living examples

Employers agents, cost and CDM advisor on the £8.5m construction 30 bed extra care facility with community café and facilities in Walton on Thames. Ongoing advice is being provided for the next 3 development phases

Project managers, architects, cost consultant and principal designer for £6.3m extra care home development in Gravesend

Council tax advice for a UK operator

Quality assurance work for a major later living operator on a development in Tunbridge Wells

Development monitoring for an operator specialising in later living and flat and housing developments for the over 55’s

Valuation of a 400+ senior living scheme plus associated elements

Quality assurance work for a later living operator with 500 properties across the UK

Fibre implementation for major UK care home provider with 1,200 properties

Red book valuation of council-owned land, followed by viability advice on 72 private and affordable retirement units and then a pricing strategy resulting in sell out at asking price

400+

500

1,200

72

Connecting today for tomorrow – Digital capability, capacity and the infrastructure to support it

To get the best insight into how policymakers are thinking about the issue of connectivity, we conducted a wide-ranging survey of 100 MPs and more than 500 local councillors. The findings are shared in detail throughout our latest report, Connecting today for tomorrow.

Connecting today for tomorrow
Digital capability, capacity and the infrastructure to support it

The UK is targeting gigabit capable broadband for 99% of premises and 'standalone' 5G coverage nationwide by 2030.

The UK is currently 6th in global GDP rankings but 51st in global rankings for mobile data speeds.*

In a recent Cluttons survey less than a third of MPs think we will achieve this.*

Adoption of 5G could bring additional economic benefit to the UK of up to £159 billion by 2035.*

The benefits of having good connectivity are far reaching, so what's the solution to speeding up the process?

Spoiler alert, we all have a part to play...
...read our latest report to understand more about the current challenges, the role of all the key stakeholders and the potential solutions.

Scan the QR code to download our report or visit cluttons.com/ctft

CLUTTONS

Cluttons – the first true 'real assets' advisory business

Cluttons is a real assets advisory business that creates value for its clients by broadening traditional infrastructure, commercial and residential property advice for a future-facing market. We do this by continuing to grow our industry leading focus on digital connectivity, energy transition and the route to net zero.

We deliver the full range of property consultancy services including property management, valuation, building consultancy, commercial and residential estate agency, corporate occupier services, business rates, and lease advisory.

1765
Cluttons established

250+
Employees

10
Offices across the UK

Valued **£2.5bn** of London residential for loan security

Value **£10bn** of residential cyclically

Valued **£2bn** of commercial property for loan security

Transacted on **£150m** of new homes

Managed over **£60m** of construction projects

In the last 12 months our residential investment team has taken **£64m** of stock to the market

Assessed over **£100m** of building insurance

Provided development monitoring of over **£600m**

We handle **c.1,500** wayleaves per annum

For further details contact

Infrastructure



Darren Zitren
Head of Infrastructure
+44 (0)7889 640 737
darren.zitren@cluttons.com



Danny Sherman
Partner, Infrastructure
+44 (0)7860 188 105
danny.sherman@cluttons.com



Sarah Gibbs
Partner, Infrastructure
+44 (0)7971 809 409
sarah.gibbs@cluttons.com



Jamie Merrell
Partner, Infrastructure
+44 (0)7525 632 586
jamie.merrell@cluttons.com

Valuation



Jonathan Rhodes
Partner, Head of
National Valuation
+44 (0)7971 809798
Jonathan.rhodes@cluttons.com



Alex Cocking
Partner, Head of London
project & building consultancy
+44 (0)725 372 778
alex.cocking@cluttons.com



Philip Booth
Partner, Head of
project management
+44 (0)7808 886 739
philip.booth@cluttons.com

Building consultancy

Project Management

Recent research publications



Connecting today
for tomorrow



Connecting the UK



Connectivity
commercial impact

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Cluttons LLP

Yarnwicke
119-121 Cannon Street
London EC4N 5AT