



BRIEFING PAPER

# Digital Telecare: How ready are we for the digital switch?

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Housing LIN

*Connecting people, ideas and resources*

## Foreword



### Tim Barclay, CEO, Appello

When I joined Appello as Chief Executive in January 2018, digital telecare was still in its infancy. The technology was already proven to be robust, reliable, and transformational - in fact that was part of the attraction to helping to shape the direction of a growing business. However, the adoption in the sector was still minimal. A few customers had taken the commendable approach to lead the way, recognising the wider advantages digital offered to their customers and business, but most were taking a more cautious approach.

As the technology has become even more proven over time, the range of digital products has grown and the digital benefits have become even more evident, we have seen considerable growth in recent years. But the reality is that those providing Technology Enabled Care services, such as telecare and warden call to customers need to act faster and at a larger scale to ensure their services are fit for purpose in this new digital environment.

This is not a commercial driven message; it is widely shared by industry bodies that the move to digital is a requirement. As a business we would clearly welcome new customers, but in reality, as outlined in this briefing, not Appello or any one supplier would be able to meet the demands of the whole sector. In fact, the big question is, can all the suppliers combined meet the potential demand?

2025 is in fact a red herring as the impact of first-time call failures on digital networks is very evident today. That date though has given everyone a target to work towards however, as outlined in this briefing, it is becoming evident that those who are slower to respond are likely to experience the most hurdles on their digital journey.

### Jeremy Porteus, Founder & CEO Housing Learning & Improvement Network

I am delighted to provide a foreword to this important sector briefing. It comes hot on the heels of the announcement of latest phase of the Technology for our Ageing Population: Panel for Innovation (TAPPI).

Following a 6 month Inquiry, the first phase drew up a set of 10 foundational technology-enabled principles or value statements. We were pleased to receive input from Appello and the Inquiry Panel agreed that all new housing should be:

- Adaptable – able to adapt to changing user needs and technological advances
- Co-produced – involving people to co-create solutions to inform how they want to live their lives
- Cost-effective – offer value for money and benefit both to individuals but also to workforces in local housing and care economies
- Choice-led – enabling access to more options that meet individual needs and wishes
- Interoperable – ability to integrate and work across systems and platforms to meet individuals' diverse needs and aspirations
- Inclusive – reduce digital, health, income inequalities to enable active involvement in home, local community or networks
- Outcome-focussed – improve health & wellbeing to improve quality of life or maintain independence
- Person-centred - putting the person first to give control over own environment, care and support needs etc
- Preventative – focused on prevention rather than reactive models
- Quality-focussed – in designing products, systems and services to ensure 'fit for purpose'

With co-production at its heart, the second phase (or TAPPI2) is now "road-testing" these principles across 6 sites across England, Scotland and Wales. In partnership with the TEC Services Association and funded by Dunhill Medical Trust we will be producing a 'digital-ready' TAPPI Framework to ensure the adoption of the 10 principles to implementation. However, what is already clear is that many housing providers are still not yet fully prepared for the digital age. This briefing highlights the urgency of why doing nothing is not an option for the sector.

# Digital Telecare Briefing: How ready are we for the digital switch?

With work to upgrade our telecoms network well underway, how are both the telecare industry and housing/social care providers responding to the need to transition to digital services? This briefing considers what progress has been made so far and the challenges we still face to ensure essential telecare services are safe now and in the future.

## The digital age is upon us – but have telecare services caught up?

Much has been written about the advantages digital telecare offers over its traditional counterpart. There are significant benefits for organisations looking to improve both their customers' experiences and their own business systems. But the crucial consideration in 2022 has to be the continuity and reliability of telecare services over a digital infrastructure.

The news in 2016 that the UK's analogue telecoms network was to be upgraded put digital telecare firmly on the agenda for housing providers, with serious safety issues around operating traditional analogue telecare services over a digital network.

Both the telecare industry and housing providers utilising vital telecare services need to ensure they are ready for the digital switchover in order to protect these. With the 2025 cut-off date for this just over three years away, it is time to take stock of where we are with, what effectively needs to be, a mass migration to digital telecare.

This briefing looks at the current situation and what still needs to be achieved, as well as highlighting a number of potential complications that may hamper progress.

It's essential for all involved to be aware of the bigger picture: both from the perspective of housing providers, who have a duty of care to ensure their services meet the needs of the people relying on these, as well as telecare suppliers, who have a responsibility to support their customers.

Key questions we need to ask ourselves include:

- As demand for digital telecare inevitably increases, what are the capabilities of the telecare industry?
- What does this mean for housing providers, both general housing needs and specialist providers, such as extra care housing or retirement living, or supported housing?

## The current picture: what progress has been made so far?

Back in 2017, the **'Fast Forward to Digital'** report from Housing LIN and Appello looked at attitudes to digital telecare within the supported housing sector. More than half of the respondents (56%) were actively planning to move to digital and 84% saw digital technologies as critical for future success.

What does the digital telecare landscape look like five years later?

The challenge with any new technology is getting to the point where it has been adopted by the mainstream market. In fact, there is a recognised pattern to this known as the **'Technology Adoption Curve'**, which splits the market into five distinct groups based on their approach to new technology or products: Innovators, Early Adopters, Early Majority, Late Majority and Laggards.

Digital telecare is no different. There have been many early adopters within the supported housing sector. The drive for this has included both the anticipation of the changes to the telecoms network, as well as the benefits digital brings across other areas.

But we have not yet seen the necessary widespread uptake of digital telecare.

Right now, the adoption timeline probably sits somewhere within the Early Majority group. This indicates when the technology is moving into the mainstream but still leaves a sizeable chunk of the market yet to embrace it.

The following figures give some indication of the current situation regarding digital telecare:

- In its industry factsheet, Openreach states that there are **176 Alarm Receiving Centres (ARCs)** in the UK, serving 1.3 million dispersed alarm customers in private homes and 500,000 people in group schemes.
- It is estimated that 110 of these ARCs still only have the capability to monitor analogue calls.
- Estimates also show that only 5% of the £1m+ dispersed alarms are already digital.
- In addition, there are approximately 25,000 specialist housing developments with hardwired telecare systems, each containing 30 homes on average. It is estimated that approximately 1,000 of these have been upgraded to digital.

This is a snapshot of where we are now but even these approximate numbers highlight that the majority of telecare services do not yet have digital capability.

The logical next question is whether we are making enough progress with this digital transformation.

A recent discovery exercise by TEC Cymru showed that only 3 of the 16 councils that responded currently use digital alarms, and only 19% have a plan to migrate their services to digital. However, 67% are worried about the digital transition.

**TEC Cymru National Telecare Programme - Discovery**

## Are we on track for the transition to digital telecare?

There is now a very good level of awareness within the housing sector that our analogue telecoms network will be turned off in 2025. On the face of it, this leaves just over three years for housing providers to upgrade their telecare services to ensure the required continuity of service.

Three years may seem a long time – but this deadline has been somewhat misleading. It suggests that there will be one momentous 'switch on' date for the digital network in the UK when, in fact, the work to upgrade the network is well underway; a rolling programme across the country means that some areas already have digital in place. Of course, this number is only going to increase going forwards.

Given the figures outlined earlier, it's clear that there is still a significant amount of work to be done to ensure telecare services are ready to meet what is now an ongoing transition to the digital network over the next three years.

The hard truth is that we are probably not on track right now.

In addition to this, we're looking at a scenario where a substantial number of housing providers will all be seeking to upgrade their telecare services within the same period of time. This could pose several challenges, with potential supply chain and industry capacity issues that could then impact everything from the timings to the costs of digital telecare projects for housing providers.

"We know that sadly the technology enabled care industry is not as far along the digital transition as we'd hoped... some of the reason for that is a lack of clarity and understanding... about how to get that transition process underway."

**'Drawing a line in the sand'**, Tim Mulrey, Lead Advisor on Analogue to Digital at TEC Services Association

## What are the challenges?

The success of this mass migration to digital telecare is dependent on housing providers initiating the projects to upgrade their systems, and telecare suppliers being able to support their customers with the right solutions.

As the clock ticks closer to 2025, this adds a considerable time pressure into the mix. With a hard deadline approaching, it's important to be aware of the challenges linked with this in order to judge what can realistically be achieved within the timeframe.

### The monitoring challenge

One of the main barriers for housing providers moving to digital services is ensuring that their current monitoring platform or provider has the capability to receive digital protocol telecare alarm calls. This should be a priority for housing and social care providers as it sets the foundations and enables the wider move to digital services.

Digital protocol is essentially the language or set of rules that digital systems use to communicate with each other, and there are agreed standards for this for digital telecare (SCAIP, which can work with a variety of digital telecare equipment; and NOW IP v1.6, which commonly applies to group 'warden call' schemes).

It's essential that monitoring centres support these protocols in order to be able to receive communications from digital telecare equipment from various manufacturers.

However, as we saw from the current figures, the majority of monitoring centres in the UK are still only able to monitor analogue calls. At this time, one of the largest providers doesn't have a digital monitoring platform in place, so monitoring centres will either need to move to one of the few suppliers offering digital call handling platforms, or wait until this supplier releases a digital version. There has been no firm date set for this yet.

To put the scale of this monitoring challenge in context:

- Projects to move to a new platform provider generally take approximately 6 months, from procurement through to the 12 weeks of implementation.
- At present, the market delivers a maximum of 20 platform upgrades per annum.

With a large percentage of ARCs yet to have digital capability and the current project timelines for this, those three years until the digital switchover will quickly disappear.

### The equipment challenge

Linked to the monitoring challenge, those housing providers who are not yet on a digital monitoring platform are also not able to upgrade their telecare equipment, unless they procure items that have both analogue and digital protocol capabilities, which is a costly solution to the problem.

Once housing providers have access to a digital monitoring platform, however, it's reasonable to assume there will be a large increase in demand for digital telecare equipment.

This swell in demand, coupled with a hard deadline for action, will see housing providers suddenly competing en masse to secure the right solution to meet their needs and the needs of their residents. The question is: what impact will this have on the supply chain? It certainly has the potential to create a bottle-neck, with those organisations further back in the procurement queue facing shortages in equipment, increased costs and less choice.

The equipment challenge is therefore an important consideration for housing providers looking at the timelines and budgets for their digital telecare project and/or other housing or property/asset management that will be affected.

### The supply vs demand challenge

Supply vs demand is a delicate balance: supply will only increase if demand increases, but we can see how demand is being held back by not having access to a monitoring centre with digital capability.

Demand will grow when this situation changes but a corresponding increase in supply won't happen overnight. This is partly due to global supply chain issues, which are putting pressure on stock levels - there are some manufacturer's reporting a 40+ weeks' lead time. The **global chip shortage**, for example, is having an effect on the manufacture of all electronics, not only telecare devices. Shortages such as this can lead to cost implications if the production of equipment becomes more expensive.

It's also important to note that there is a finite resource for undertaking installation works in the UK. The people qualified to carry out installations are not only doing this directly through telecare suppliers but also include Mechanical and Electrical (M&E) suppliers, who specifically provide installation works as part of the supply chain. It's tricky to expand this resource to meet the numbers moving to digital systems, as it takes time to create a trained and scaled workforce.

## The capacity challenge

We know we can expect a swell in demand for digital telecare as we approach 2025 but are telecare suppliers able to meet this? Crunching the numbers gives a little more insight into the scale of what still needs to be achieved:

- An estimated 125 housing developments are upgraded to digital every month (as a side note, the majority of these are being upgraded with analogue equipment or hybrid solutions, which may have implications further down the line).
- From June 2022, there are 42 months remaining until the end of 2025, when the digital switch should be complete.
- If the rate of upgrades continues at the same pace, 6,250 developments will have been upgraded by 2025 (this includes the number already completed).
- With approximately 25,000 developments in the UK, this is substantially below the target - and only 25% of the requirement to ensure all customers have a safe, reliable alarm system.

Some quick maths shows that there needs to be a five-fold increase in the pace of upgrades to ensure a majority of customers have access to digital telecare.

“2025 is the endgame – the (digital) switchover is already taking place.”

Local Government Association

## What does this mean practically for housing/social care providers?

We can see that there are several potential challenges on the horizon, which may put pressure on a number of key areas, such as supply and capacity. This will have a knock-on effect on housing providers seeking to push forward their digital telecare projects.

- Putting together the figures outlined in this briefing, the immediate risk is that around 18,000 developments will have live safety equipment that is not fit for purpose by 2025. This leaves approximately 750,000 older and disabled people reliant on an emergency alarm system that fails **10% of the time** for first time calls, and this failure rate is likely to increase as we move closer to 2025.
- These figures do not take into account dispersed alarms that individuals outside of supported housing may rely on. In reality, the overall scale of the upgrade is much larger. While this may not directly affect housing providers, it will impact supply vs demand for all telecare equipment.
- The elephant in the room is that the telecare industry currently has a finite capacity to meet a growing (and increasingly urgent) demand for digital telecare. This is both in terms of factoring in the time required to work on projects as well as potential supply issues.
- As a result, housing providers will find that there are longer than expected lead times to complete their digital telecare project.
- A swell in demand puts pressure on the supply chain and there is likely to be an increase in costs if there are shortages in equipment/components. Any supply issues will also mean that housing providers further back in the queue may find they have less choice and will need to purchase whatever is available to make their service digitally ready.

The key takeaway for housing providers is that they will put themselves in a much stronger position if they are proactive in sourcing a digital telecare solution now, as this allows more time to work around these challenges.

Furthermore, with the requirement to move to digital services now widely acknowledged, moving to digital now will mitigate the potential reputational risks associated with the impact of call failures and the potential safety implications on customers.

“Inaction on switching to digital telecare could lead to dangerous failures of essential services, and will put the support given to vulnerable individuals at risk.”

Digital Healthcare Scotland, National Briefing Document

## What's holding housing providers back from going digital?

A mass digital migration is a significant undertaking and there are many different factors that affect how quickly housing providers have been able to move with this. These range from waiting to see what is 'tried and tested' or not wanting to make an investment in 'new' technology; to confusion around the best solution and budget considerations; to a sense that there is plenty of time or dealing with the interruption of the Covid pandemic.

Back in 2017, challenges cited in the ['Fast Forward to Digital' report](#) included a sense that technology partners were holding the organisations back, with nearly a third of the respondents stating existing telecare contracts were stopping them from moving to digital at that time.

This is still an issue in 2022.

The [TEC Cymru 'Discovery'](#) survey highlighted that there was a perception that the digital telecare market was still developing, along with a lack of information about digital solutions from suppliers, such as their existing ARC system provider. These findings have been echoed anecdotally by organisations across England.

Perhaps this is partially due to the fact that there are many suppliers who have not been ready for the digital switch themselves. This is apparent when we see major service providers who have not yet implemented a digital monitoring platform for call centres, or where there is telecare equipment on the market that has not been upgraded to at least hybrid capability.

In addition, there is still limited interoperability amongst telecare equipment, meaning that housing providers have a reduced pool of products to choose from as they look at how they can make digital work with their current systems and equipment.

These issues create practical barriers for housing providers. Discrepancies in the market have also possibly made it harder to judge the true urgency of the situation. There are mixed messages when there are telecare suppliers who do not have a fully digital offering that they are talking to their customers about.

The telecare industry as a whole needs to support housing providers by:

- Being open about realistic timeframes and what is needed to move forward.
- Working together as an industry to ensure consistent standards and solutions to avoid confusion.
- Designing digital telecare equipment to open standards to enable interoperability and provide more flexibility for housing providers, as recommended by the [TAPPI Inquiry](#).
- Sharing experiences of system change and lessons on how the sector is gearing up for digital switchover.
- Evidencing the benefits and improved outcomes that can be achieved for residents.

## What should housing providers do now?

Given all the factors outlined in this briefing, it seems unlikely that everyone will be able to move to digital ahead of the end of 2025.

The stark reality is that this will put people at risk, the people who the industry has supported for many years. This is a sobering prospect but, as a housing provider, you need to consider your responsibility to your own customers first and foremost. A failure to do this will increase reputational risk as the most vulnerable residents in your homes are left without an effective emergency alarm service

Some organisations may still be debating what impact the switch to digital will have on telecare services in practice, perhaps weighing up the chances that analogue equipment will continue to work or can be retrofitted with a digital converter.

However, the realities and risks of running an analogue service over a digital network are already apparent. As the work continues to replace the analogue network, there has been a reported increase in **call failure rates**, issues with ensuring a **continuity of service**, and the ongoing impact of **stop sells** as analogue is no longer supported.

**Learning from the experiences of other countries** who have already undertaken a switch from analogue to digital, the period of voluntary migration (i.e. the phase before the analogue network is turned off completely) is key for a smooth transition. Those who have already acted have had time to make conscious decisions and dovetail their move to digital with other organisational priorities.

It's important to note that this isn't simply a commercial message: industry bodies, Openreach and the various telecoms providers, and local government bodies are united in urging housing providers to safeguard these critical services now.

As this briefing highlights, the impact of the digital switchover will be felt long before the final deadline of 2025. It's therefore important to make sure you are proactive in positioning yourself at the front of what will be a very long, slow queue in order to ensure the safety of your telecare services now and in the future.

Recommendations for housing providers:

- Get started - the time is now!
- Talk to your service providers and other suppliers if necessary.
- Confirm a timeline and set out your priorities.
- Take a look at these useful resources for advice on all aspects of planning a digital telecare project

"All services will eventually have to transition to digital. This makes the time, finances and resources spent maintaining an obsolete platform seem more of an additional cost than any real saving... It seems increasingly hard to justify focusing on maintaining business as usual, when that time could be spent preparing a resilient, innovative service which can meet the demands of the future."

**'Is the transition to digital telecare really necessary?'**, Digital Telecare for Scottish Local Government



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[www.appello.co.uk](http://www.appello.co.uk)



For more on housing and digital technology generally, visit the Housing LIN's pages:

[www.housinglin.org.uk/going-digital](http://www.housinglin.org.uk/going-digital)