



DIGITAL POLICY FRAMEWORK

Chief Minister's Department

February 2017



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Chief Minister's Preface

Jersey has a long track record as a fast mover, adapting to new trends to carve out its area of expertise. We have been world-famous as clothing producers, farmers, fishermen and, most recently, as financiers. Digital represents Jersey's great opportunity to enhance our position as a knowledge-based economy, delivering prosperity and stability for the Island and its people.

"Digital" is the world of Internet-enabled technology, within both the sector of specialist businesses developing new uses for online technology, as well as the wider economy that relies on the Internet. The development of the digital sector will play an important role in the Government's efforts to diversify the economy and pursue productivity-led economic growth. Over the life of this Framework, the high-productivity digital sector will become an increasingly significant driver of the Island's prosperity.

As we look to the future, Jersey will become one of the most attractive locations in the world to run a digital enterprise. We will ensure the workforce has the right skills for the digital age and that people have the capability to make the most of a more connected society. By pioneering the use of new technologies in government, we will transform our public services and make them as accessible as the most innovative consumer services developed by the private sector.

The government has already made significant strides towards realising the potential of the digital revolution by:

- launching Digital Jersey to act as a trusted advisor, a facilitator between public and private sectors, and a promoter of our digital industry abroad;
- investing £9.5m in an eGovernment programme that will transform the way government interacts with Islanders and make it more efficient;
- establishing a dedicated Digital Policy Unit in government;
- investing in superfast fibre-optic broadband connections to the premises;
- commissioning the Atkins Review to identify where we can strengthen the Island's cyber security.

As technology changes the way we do business, a growing digital sector will ensure that the Island remains globally competitive and ready to capture the opportunities of the future.

Senator Ian Gorst
Chief Minister of Jersey

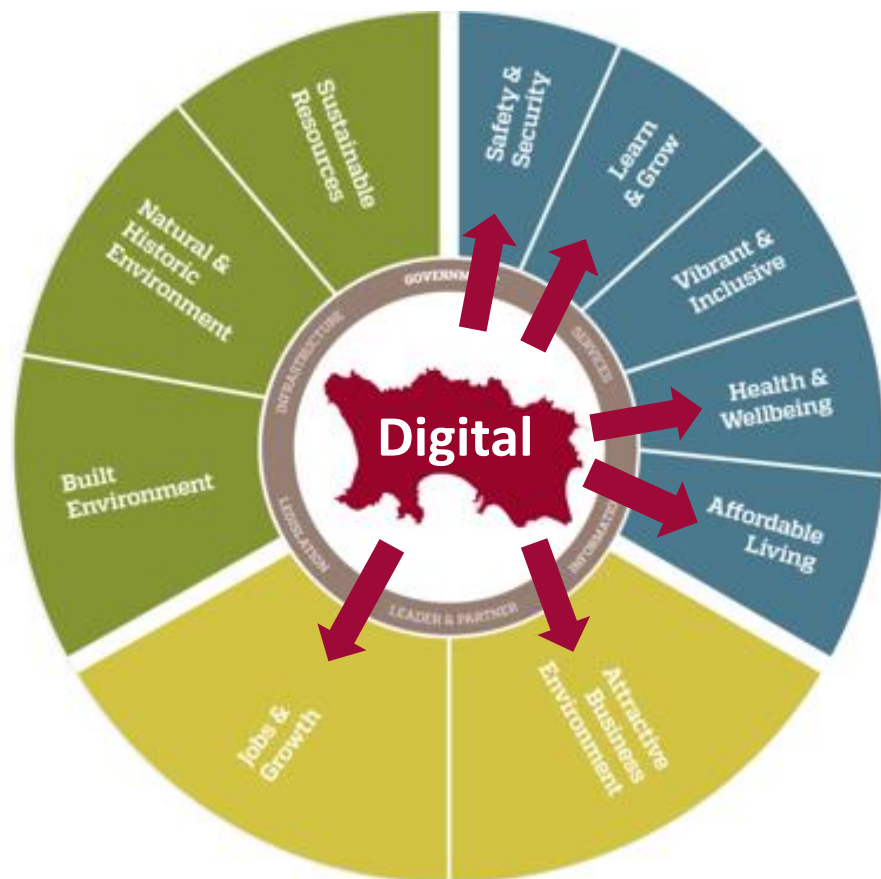
What is the Digital Policy Framework?

The Digital Policy Framework sets out six core long-term objectives for the future of digital policy-making in Jersey. It follows extensive consultation with Islanders, including contributions from the private sector, states members and government departments, whose perspective shaped the Framework.

The objectives and principles contained in this Framework will determine our approach to policy for the next decade. The objectives describe what we are aiming to achieve, and the principles explain how we will approach policy development to achieve our stated objectives. Greater practical detail will be included in separate documents. This Framework will therefore remain consistent in the face of new challenges as technological change accelerates.

This Framework contributes directly to seven of the eleven strategic goals set out in Shaping Our Future¹.

It will promote **safety & security** through a robust approach to cyber-security. It will help Islanders to **learn & grow** by providing digital skills to all. It will deliver more efficient public services to improve **health & wellbeing**. It will facilitate **affordable living** through ensuring reasonable pricing in essential telecoms services. It will shape an **attractive business environment** to deliver **jobs & growth**. The success of this Framework, will mean improved public finances, efficient and convenient public services and well-maintained infrastructure to ensure that Jersey is a **well-run Island**.



¹ States of Jersey, Shaping Our Future;

<https://www.gov.je/SiteCollectionDocuments/Government%20and%20administration/ID%20Shaping%20Our%20Future%20Brochure%2020160630%20DS.pdf>

What does Jersey offer?

- A stable political system with fiscal and legal autonomy. Jersey has no net debt thanks to significant reserves.
- A leading and growing international finance centre, with a broad range of products and services that competing jurisdictions find difficult to match.
- A welcoming and forward-thinking regulatory and legislative environment, built on close cooperation between regulators, government and industry. Jersey already has regulations to allow virtual currencies².
- A world-leading network of digital infrastructure with over two thirds of premises having access to high-speed fibre broadband³, 3 stand-alone 4G networks⁴ and world-class data centres.
- A rapidly growing digital sector that already employs over 4% of Jersey's workforce⁵. Tech businesses and entrepreneurs form a community for work, collaboration and learning.
- A robust and independent judicial system based on modern commercial law principles.
- A tax-neutral environment, with no capital transfer tax, capital gains tax, value added tax, withholding taxes or wealth taxes. This provides tax certainty and allows for fiscally efficient cross-border investment.
- A technology-friendly education system with ICT study compulsory for students up to the age of 16, a computing curriculum up to Key Stage 4 and reskilling courses for the Island's workforce.

² Regulation of Virtual Currency Policy Document, 2016;

<https://www.gov.je/SiteCollectionDocuments/Government%20and%20administration/P%20Regulation%20of%20Virtual%20Currency%2020151021%20GP.PDF>

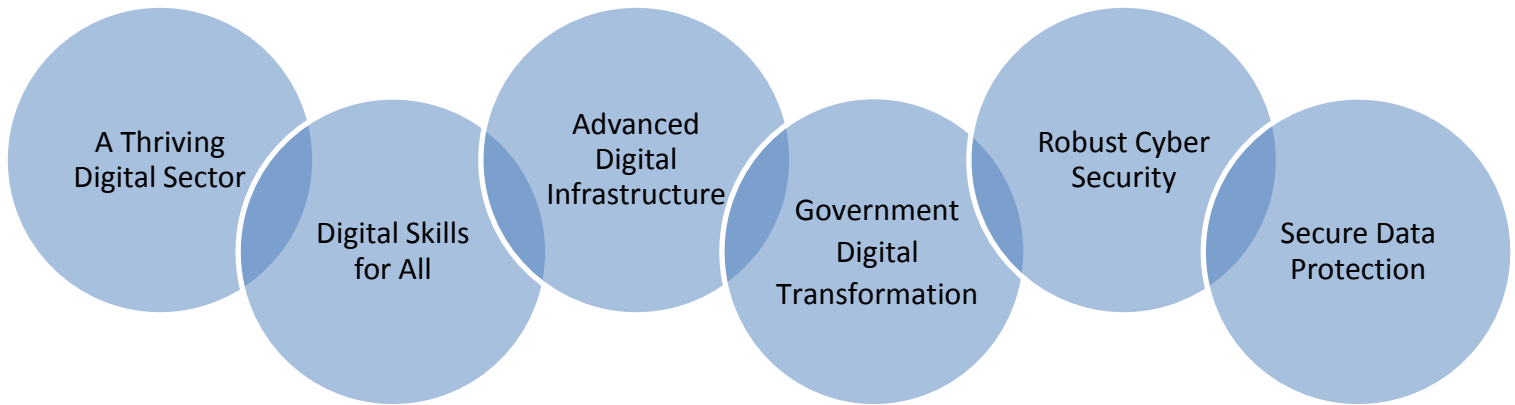
³ Gigabit Jersey, October 2016

⁴ Covering 95% of the Island's geographic area

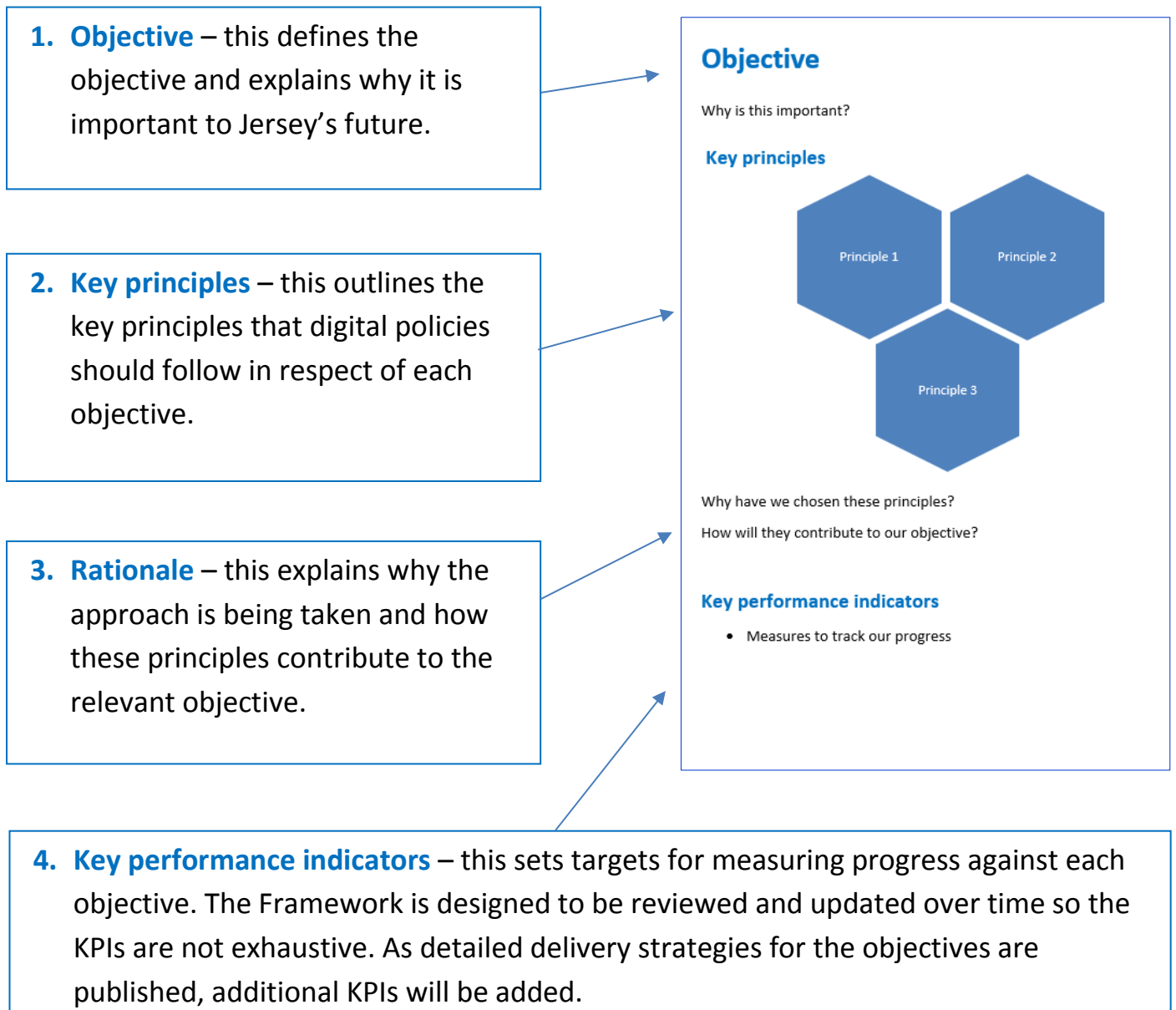
⁵ Digital Jersey Analysis

About

The Framework consists of six overarching **objectives**:



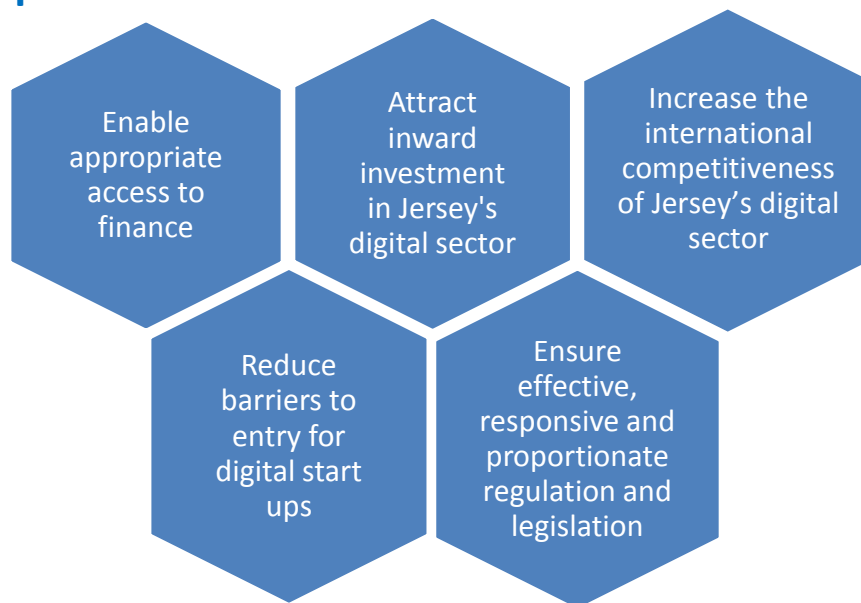
It dedicates a page to each of these objectives, as shown in the following example:



A Thriving Digital Sector

A thriving digital sector⁶ will provide Jersey with additional high-value jobs and encourage the spread of new technology to other industries, accelerating economic growth and increasing productivity.

Key principles



Jersey can become one of the most attractive locations for digital businesses. Government established Digital Jersey, in cooperation with other agencies, to encourage the growth of a strong digital sector by acting as an advocate for industry and a facilitator between public and private sectors. Digital Jersey supports local digital businesses in exporting their goods and services, and promotes Jersey as a location of choice for companies from overseas.

Government will work with the regulators and industry to shape a responsive regulatory environment, enable the adoption of new technologies, and encourage innovation. These principles will help develop Jersey into a competitive and mature digital business centre, securing productivity-led growth for the Island.

Key performance indicators

- High-productivity digital sector employment⁷ up by 1000 by 2025
- GVA⁸ of the digital sector increased by 50% by 2025
- Productivity of the sector increased by 10% by 2025⁹
- First annual measurement of the size of Jersey's digital sector by 2018

⁶ Our definition of a digital sector is detailed in annex 3.

⁷ Definitions of what constitutes high-productivity digital sector employment will be defined, following a measurement of the sector.

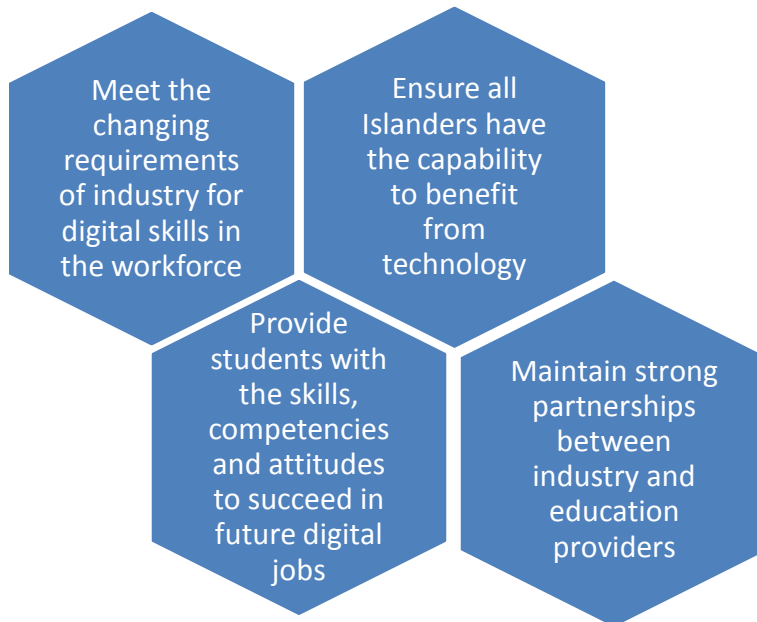
⁸ Gross Value Added

⁹ Measured as GVA per full-time employee, in real terms

Digital Skills for All

Digital skills are vital for the growth of the digital sector and increasing productivity across the economy. Enhancing digital skills at all stages of life will help to ensure that the benefits offered by new technology can be accessed by all Islanders.

Key principles



Digital skills are increasingly essential in business and to society as a whole. Government will support better understanding, at the highest levels of business, of technology’s potential to transform or disrupt established industries. The digital sector requires specialist skills, such as software development, which will be provided through mainstream education, initiatives to promote reskilling and, where necessary, by facilitating recruitment of highly skilled specialists from overseas.

Building on the successful introduction of coding lessons at primary school and the implementation of a new computing curriculum up to Key Stage 4, government will ensure that students receive the education they need for the high-value jobs of tomorrow. As the requirements of industry evolve, we will develop the links between business and education providers to ensure that the supply of digital skills meets future demand.

Through initiatives to promote digital literacy, government will also provide support to ensure that all Islanders feel confident using technology in the workplace and at home.¹⁰

Key performance indicators

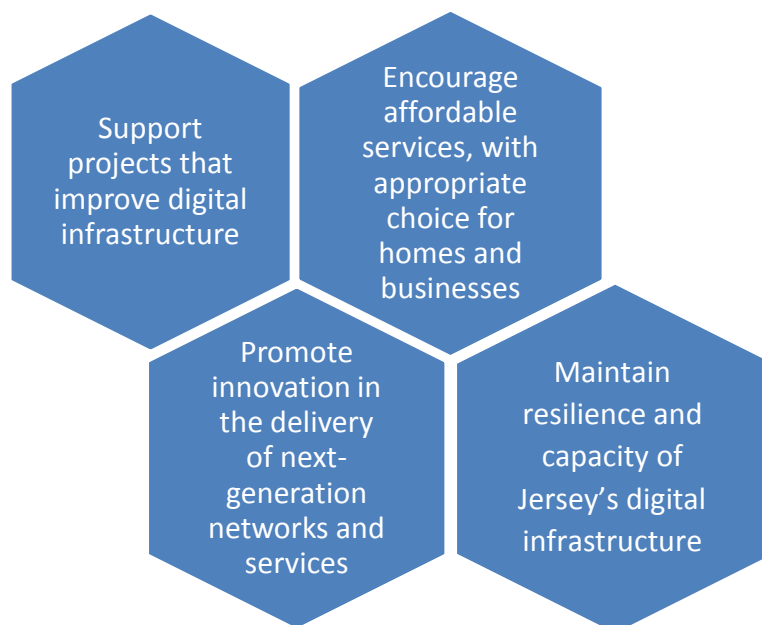
- Computing curriculum compulsory for all students up to the age of 16 by 2020

¹⁰ Jersey Computing Curriculum;
<https://www.gov.je/SiteCollectionDocuments/Education/ID%20Jersey%20Curriculum%20Computing%2020160531%20PH.pdf>

Advanced Digital Infrastructure

Jersey has excellent digital infrastructure. Maintaining and developing this digital infrastructure as both technology and consumer demand evolve will be critical to achieving our digital aspirations.

Key principles



Government will continue to support projects that improve the reliability, resilience and affordability of Jersey's infrastructure. By 2019, for example, fibre to the premises will have been rolled out across the Island, delivering some of the highest broadband speeds available anywhere in the world. Government policies will also look further to the future, encouraging innovation and resilience in the telecommunications sector, to ensure that next-generation services are available in Jersey in the long-term.

The delivery of advanced digital infrastructure will be supported by a telecommunications strategy that will describe the specific steps to be taken, including ensuring 1Gb/s broadband availability to every premises, and the optimal use of spectrum so that consumers have access to the range of services they require. In all of this, Government will continue to encourage a competitive market that promotes affordability and a high quality of products and services.

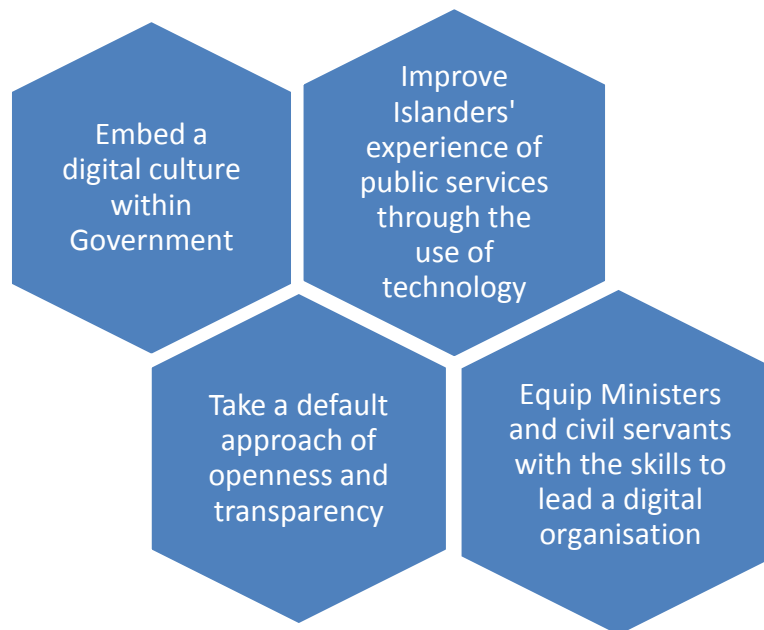
Key performance indicators

- Completion of island-wide fibre to the premises broadband rollout by 2019
- A Universal Service Obligation to guarantee the ability to access 1 Gb/s by 2020

Government Digital Transformation

Technology has the potential to substantially improve the experience of engaging with government, with marked benefits for government spending. The eGovernment programme will improve customer service by moving services online. We will build on this by using technology to transform how Government operates.

Key principles



Government will look for far-reaching changes, including addressing its culture, practices, and technology. This approach will reduce cost and shape a government responsive to the Island's needs. In doing so, government will clarify its future technology requirements to ensure that local companies continue to have opportunities to compete for public sector technology contracts. Digital transformation requires a digitally skilled civil service and a sufficient number of digital specialists to deliver real change. By combining better use of technology with greater transparency, government will improve trust and engagement in the political process. As more services become available online,¹¹ government will continue to focus on the public's needs, improving the user experience and the availability of services.

Key performance indicators

- Digital leadership training provided to 90% of senior management by 2018
- Regular publication of performance and spending data under open licence by 2020
- Government data usage in line with international standards on cyber security and data protection¹²

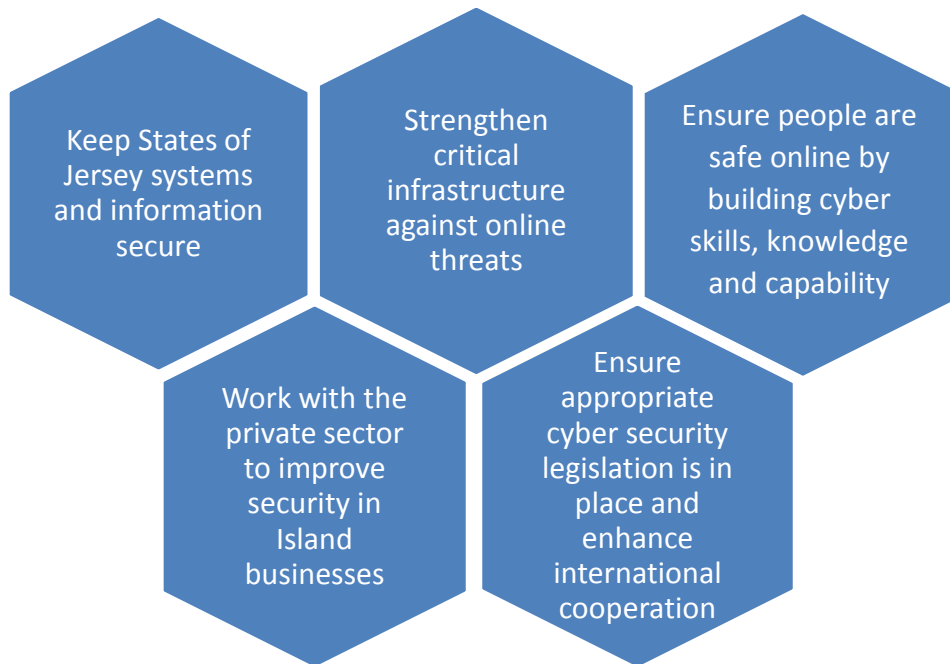
¹¹ eGov briefing to industry, August 2016: https://blog.gov.je/wp-content/uploads/2016/08/SoJ-eGov_Industry-Briefing-August-2016-1.pdf

¹² This will include the EU General Data Protection Regulation and the Council of Europe Convention on Cyber Crime

Robust Cyber Security

Cyber security plays a crucial role in supporting economic growth and ensuring that Jersey continues to be a safe place to live and to do business. Potential cyber security threats do not just affect data and systems in government and business, but also critical infrastructure, including emergency services, energy, health, transport and water.

Key principles



To protect the Island, government will work with the private sector and the operators of our critical national infrastructure to incentivise investment in robust cyber security. Government itself must also be able to operate with confidence in the digital environment, be trusted to handle data and remain capable of protecting islanders' privacy.

As society becomes more connected, we must also promote awareness of cyber security and ensure people know how to stay safe online. Government will expand and strengthen our network of international partners and, through Jersey's leadership of the Small Island Nations Centre of Excellence for Research and Education (SINCERE), will continue to combat cybercrime.

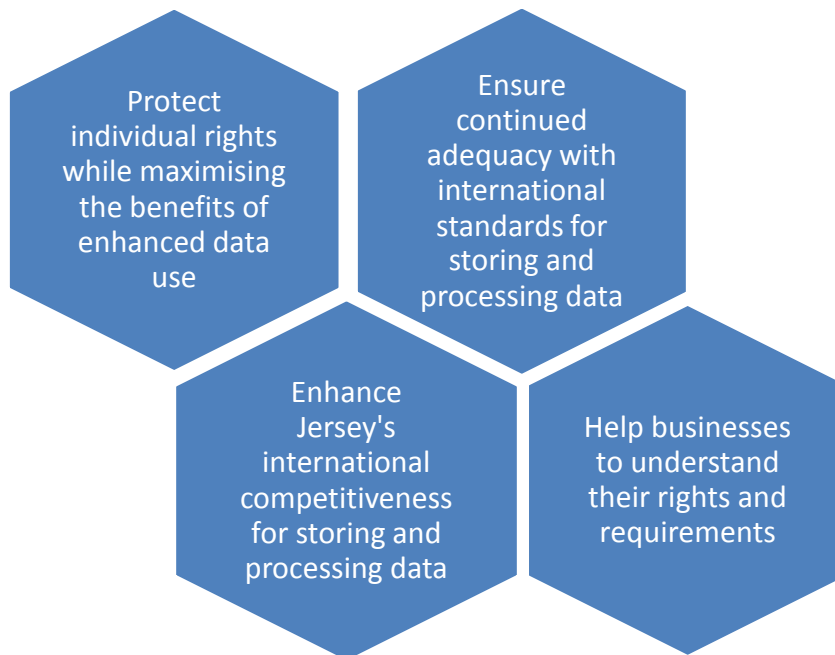
Key performance indicators

- An incident response mechanism agreed to by Government and industry by 2020
- The completion of two biennial Island-wide reviews by 2020
- Extension of the Council of Europe Convention on Cyber Crime to Jersey by 2018

Secure Data Protection

Advances in data generation, storage, transmission and analysis are transforming the ways that businesses and governments operate, but also present challenges to privacy. A fit-for-purpose data protection regime is vital to protect individual rights and maintain access to international markets.

Key principles



Islanders have a right to know and choose how their data is used. Yet, businesses require the ability to process personal data, with confidence and clarity, to produce the products and services we value as consumers. Government will introduce a new business-friendly data protection regime that strengthens the protection of individual rights whilst promoting commercial innovation. In doing so, we will ensure that the Island continues to benefit from compliance with the strongest international standards on data protection to ensure ongoing market access with Jersey's trading partners. By working with regulators and industry, government will make sure that any new regulations are simple to follow and provide clear guidance on how to comply with the new regime.

Key performance indicators

- A new data protection regime in place by May 2018 meeting EU adequacy standards¹³
- A new operating model implemented and funding model devised for the Office of the Information Commissioner by May 2018

¹³ Jersey seeks to comply with the General Data Protection Regulation

Annex 1: Responsibilities and 2017 initiatives

The Digital Policy Framework provides the structure for policymaking from which actions will flow, as designed by a number of different partners. The responsibility for delivery of these objectives over the coming years will lie with the corresponding Government Department or body, as below.

Objective	Lead Government bodies
Thriving Digital Sector	Digital Jersey; Chief Minister's Department – Digital Policy Unit
Digital Skills for All	Department for Education, Digital Jersey
Government Digital Transformation	Chief Minister's Department - Information Services
Advanced Digital Infrastructure	Chief Minister's Department – Digital Policy Unit
Robust Cyber Security	Chief Minister's Department – Digital Policy Unit; Cyber Security Task Force
Secure Data Protection	Chief Minister's Department – Digital Policy Unit and Information Services

A number of partners will work with Government to achieve our objectives. A selection of the key initiatives for 2017 is included below. This is not exhaustive and will be updated, while always remaining within the structure of the Digital Policy Framework.

Output	Description	Key delivery partners	Deadline
Cyber security strategy	A new strategy to make Jersey a safer place to live and do business in	Chief Minister's Department, Cyber Security Task Force	Q1
Digital health strategy	A new strategy to digitise the Island's whole health and care sector	Digital Jersey, Health and Social Services Department	Q1
Fintech strategy	A new strategy to develop Jersey's proposition as a fintech centre	Digital Jersey, Chief Minister's Department, Jersey Finance, Jersey Financial Services Commission	Q2

Smart Island Strategy	A new strategy to develop Jersey's proposition as a centre for the Internet of Things	Digital Jersey, Department for Infrastructure	Q2
Education Business Partnership	Creating a forum for education providers and industry to collaborate and partner to increase digital skills in Jersey	Digital Jersey, Department for Education	Q4
Digital sector statistics released	Statistics on Jersey's digital sector including GVA, employment and productivity released	Digital Jersey, Government Statistics Unit	Q4
Data protection legislation drafted and lodged for debate	Legislation for a new data protection regime goes to the States for debate	Chief Minister's Department, Law Officers' Department	Q3
New model for Office of the Information Commissioner	Regulatory and funding model agreed	Chief Minister's Department	Q4
Telecoms strategy	A new strategy for the future of Jersey's telecoms environment	Chief Minister's Department, CICRA	Q3
Skills Strategy	A renewed strategy including a plan for digital skills in Jersey	Department for Education, Digital Jersey	Q4

Annex 2: Links to Relevant Documents

- Regulation of Virtual Currency Policy Document (2016) - <https://www.gov.je/SiteCollectionDocuments/Government%20and%20administration/P%20Regulation%20of%20Virtual%20Currency%2020151021%20GP.PDF>
- Digital Jersey 2016 Business Plan (2016) - <https://www.digital.je/2016businessplan>
- Jersey Computing Curriculum (2016) - <https://www.gov.je/SiteCollectionDocuments/Education/ID%20Jersey%20Curriculum%20Computing%2020160531%20PH.pdf>
- Fintech: Why Jersey? (2016) – <https://www.jerseyfinance.je/media/PDF-Brochures/Fintech-Why-Jersey.pdf>
- Jersey Innovation Review (2015) - <https://www.gov.je/Government/Pages/StatesReports.aspx?ReportID=1616>
- Jersey Innovation Review: Action Plan (2015) - <https://www.gov.je/Government/PlanningPerformance/Innovation/Pages/InnovationReviewActionPlan.aspx>
- Oxera review of competition and regulatory framework (2015) - <http://www.oxera.com/Latest-Thinking/Publications/Reports/2015/A-review-of-the-Jersey-regulatory-and-competition.aspx>
- KPMG Opportunity Analysis for Digital Jersey (2015) - http://www.digital.je/media/Public_Files/DJLKPMGReport2016.pdf
- Vision for IT in Education 2013-2015 ‘Thinking Differently’ (2013) – <https://www.gov.je/Government/Pages/StatesReports.aspx?ReportID=985>
- Developing a Digital Jersey (2013) - <http://www.statesassembly.gov.je/ScrutinyReviewResearches/2013/Research%20-%20Digital%20Jersey%20Strategy%20and%20Business%20Plan%20-%20Digital%20Skills%20-%202017%20October%202013.pdf>

Annex 3: Contributors

- Council of Ministers
- States Members
- Chief Minister's Department
 - Economics Unit
 - Financial Services Unit
 - Information Services
 - eGovernment
 - Population Office
- Education
 - Education
 - Jersey Library
- Treasury and Resources
 - Corporate Procurement
- Economic Development, Tourism, Sport and Culture
- States Greffe
- Digital Jersey – <https://www.digital.je/>
- Jersey Finance – <https://www.jerseyfinance.je/home>
- Jersey Business – <http://www.jerseybusiness.je/>
- Jersey Financial Services Commission – <http://www.jerseyfsc.org/>
- Office of the Information Commissioner
- Consultation responses from:
 - The Institute of Directors
 - Jersey Consumer Council
 - Digital businesses feedback sessions
 - Jersey Youth Parliament focus group
 - Terry Cox, Bootstrap Ltd.
 - Charles Robertson et al.

Annex 4: Digital Sector Methodology

What defines the Digital Sector?

The definition used in this release was developed by Digital Jersey, drawing from analysis done by the OECD using the UN Standard Industrial Classifications (SICs) along with UK Office for National Statistics (ONS). Digital Jersey's definition differs from the UK in that it includes e-commerce and advertising agencies, as sectors dependent on technology.

Methodology

These estimates have been produced using Population Office sources (Manpower returns) from identified digital businesses by SIC classification.

Sectoral Definitions

Please see below the assigned standard industrial classifications of all sub-sectors Jersey includes in its definition of the digital sector.

Standard Industrial Classification	Description
26.11	Manufacture of electronic components
26.12	Manufacture of loaded electronic boards
26.2	Manufacture of computers and peripheral equipment
26.3	Manufacture of communication equipment
26.4	Manufacture of consumer electronics
26.8	Manufacture of magnetic and optical media
46.51	Wholesale of computers, computer peripheral equipment and software
46.52	Wholesale of electronic and telecommunications equipment
47.9	Retail sale via mail order houses or via Internet
58.11	Book Publishing
58.12	Publishing of directories and mailing lists
58.13	Publishing of newspapers
58.14	Publishing of journals and periodicals
58.19	Other publishing activities
58.21	Publishing of computer games

58.29	Other software publishing
59.11	Motion picture production activities
59.12	Video production activities
59.13	Television programme production activities
59.14	Motion picture projection activities
59.2	Sound recording and music publishing activities
60.1	Radio broadcasting
60.2	Television programming and broadcasting activities
61.1	Wired telecommunications activities
61.2	Wireless telecommunications activities
61.3	Satellite telecommunications activities
61.9	Other telecommunications activities
62.01	Software development
62.02	Information technology consultancy activities
62.03	Computer facilities management activities
62.09	Other information technology service activities
63.11	Data processing, hosting and related activities
63.12	Web portals
63.91	News agency activities
63.99	Other information service activities n.e.c.
73.11	Advertising Agencies
95.11	Repair of computers and peripheral equipment
95.12	Repair of communication equipment

As we move forward, we will look to focus on increasing high-productivity digital sector employment. A definition of high-productivity digital sector employment will follow measurement of Jersey's digital sector and its corresponding sub-sectors.