



Digital Jersey

30th November 2011

IT Island
Presenting the results of the
Digital Jersey ICT survey

The core objectives of this survey are:

- To ascertain the range and nature of businesses that constitute Jersey's ICT sector
- To identify common areas of interest and common barriers to success
- To gauge the need for a coherent ICT strategy, it's purpose, scope and general direction
- To consider the role of government in delivering it
- To find today's 'hot topics' and determine what needs to happen to take advantage of any opportunities that exist

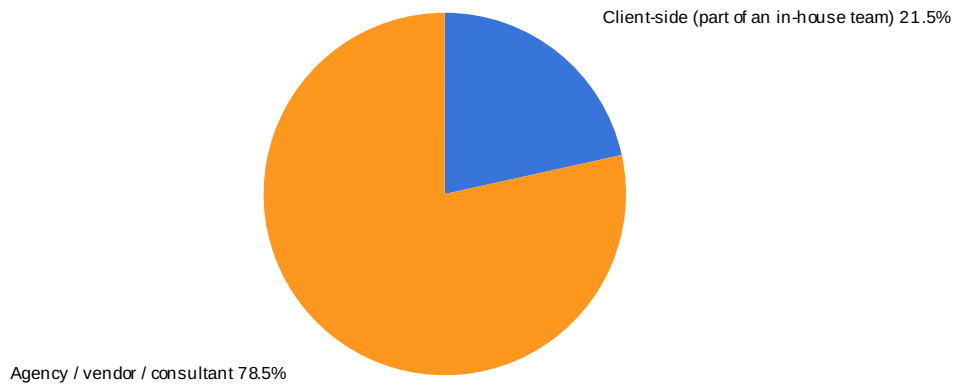
How the survey was conducted

- Open, collaborative approach to survey content
- Questions sourced from the industry using Google Moderate
- Received questions sorted into groups according to topic
- Final survey distributed via LinkedIn and direct email

FINAL ICT SURVEY REPORT - ALL DATA - 30/11/2011

Survey: Digital Jersey: ICT Survey 2011

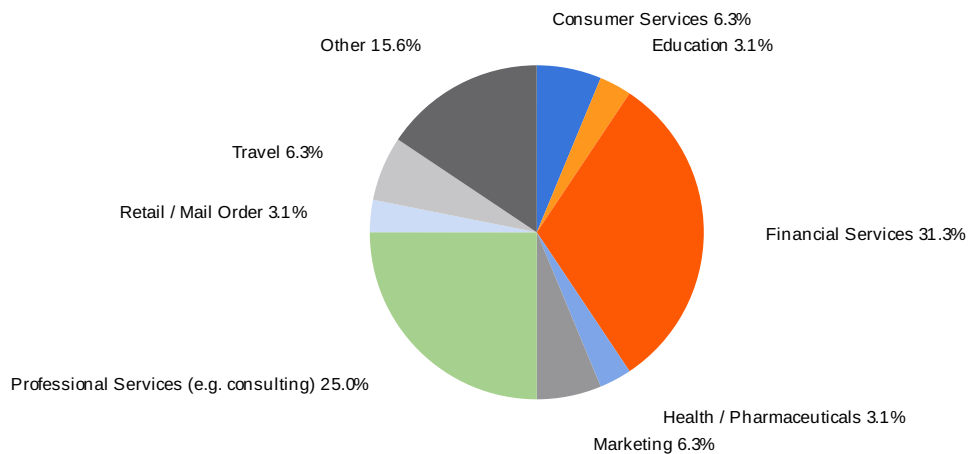
Which of the following best describes your company or role?



Which of the following best describes your company or role?

Value	Count	Percent %	Statistics	
Client-side (part of an in-house team)	14	21.5%	Total Responses	65
Agency / vendor / consultant	51	78.5%		

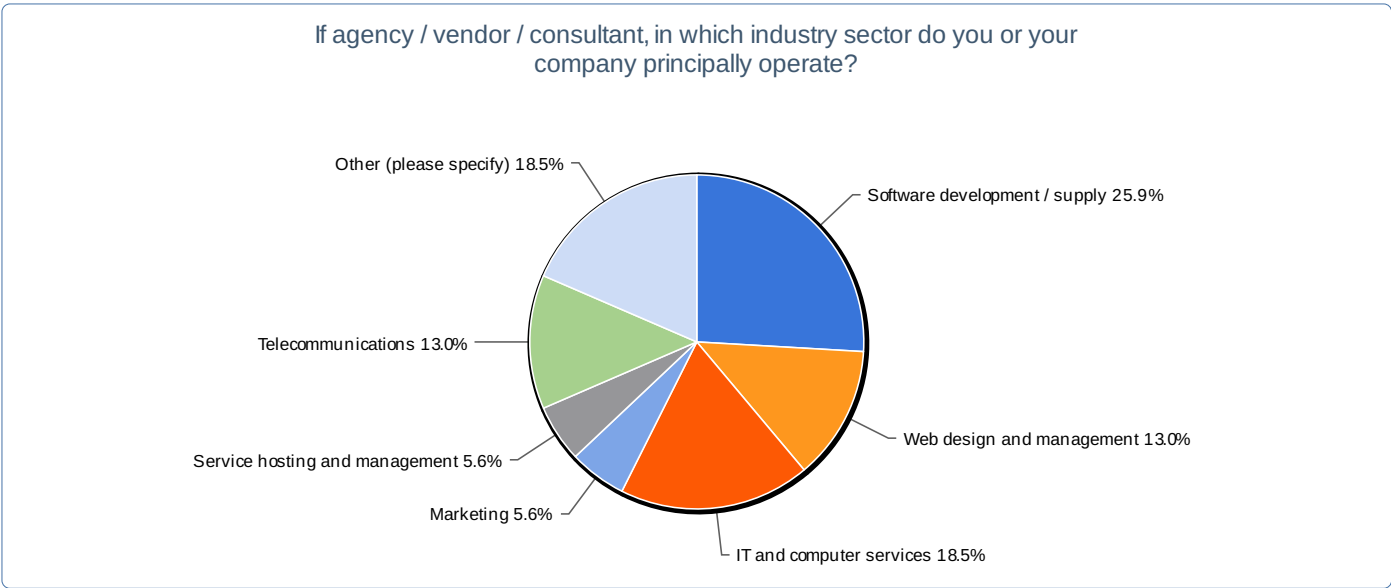
If client side, in which industry sector do you or your company principally operate?



If client side, in which industry sector do you or your company principally operate?

Value	Count	Percent %	Statistics	
Consumer Services	2	6.3%	Total Responses	32
Education	1	3.1%		
Financial Services	10	31.3%		
Health / Pharmaceuticals	1	3.1%		
Marketing	2	6.3%		
Professional Services (e.g. consulting)	8	25%		
Retail / Mail Order	1	3.1%		

Travel	2	6.3%
Other	5	15.6%



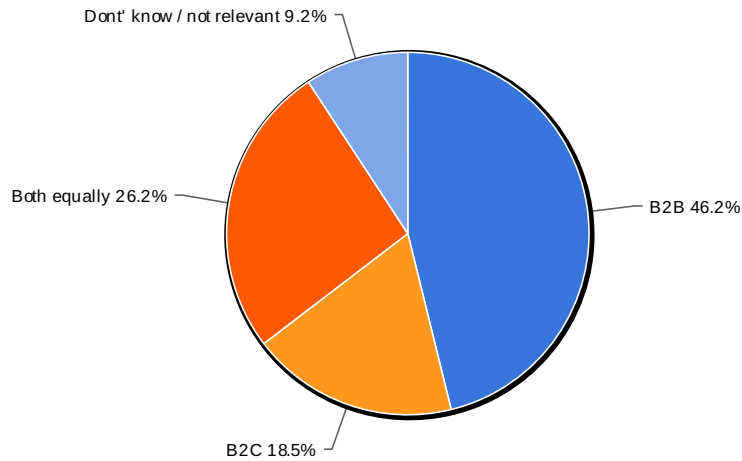
If agency / vendor / consultant, in which industry sector do you or your company principally operate?

Value	Count	Percent %
Software development / supply	14	25.9%
Web design and management	7	13%
IT and computer services	10	18.5%
Marketing	3	5.6%
Service hosting and management	3	5.6%
Telecommunications	7	13%
Other (please specify)	10	18.5%

Statistics	
Total Responses	54

Open-Text Response Breakdown for "Other (please specify)"	Count
Business Change	1
Business Intelligence	1
Business change	1
Digital Print Provider	1
E-Commerce Consulting	1
Finance Industry	1
Fulfillment and dsitribution	1
PR & communications.	1
Sectors are Incorrectly specified	1
financial industry	1

Is your business focused more on B2B or B2C?



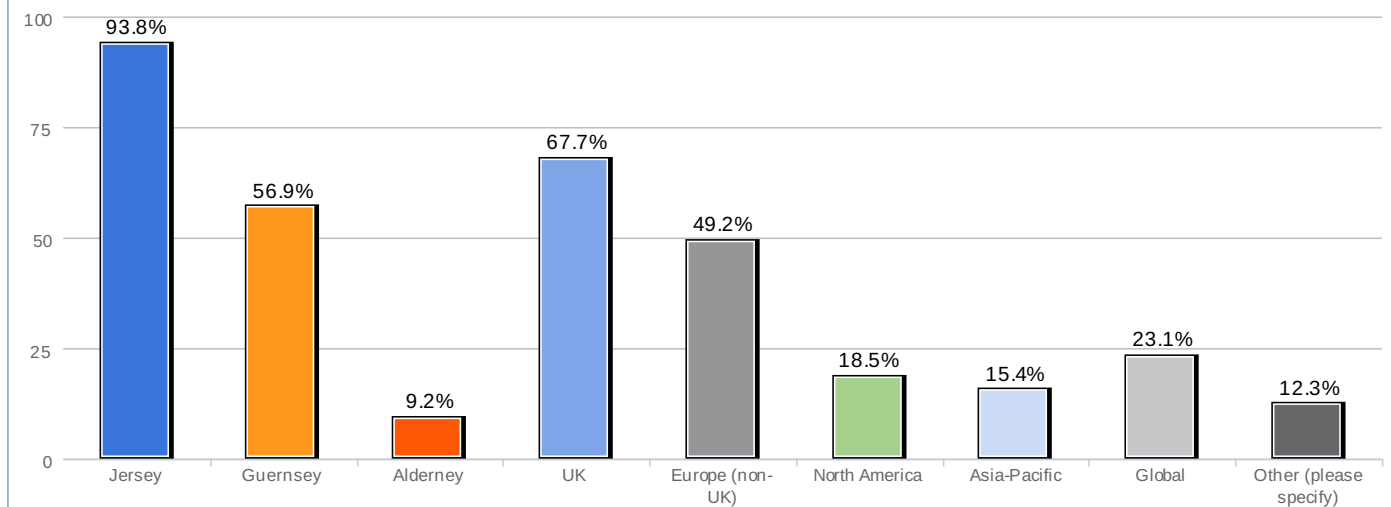
Is your business focused more on B2B or B2C?

Value	Count	Percent %
B2B	30	46.2%
B2C	12	18.5%
Both equally	17	26.2%
Dont' know / not relevant	6	9.2%

Statistics

Total Responses	65
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In which countries / jurisdictions does your company do business?



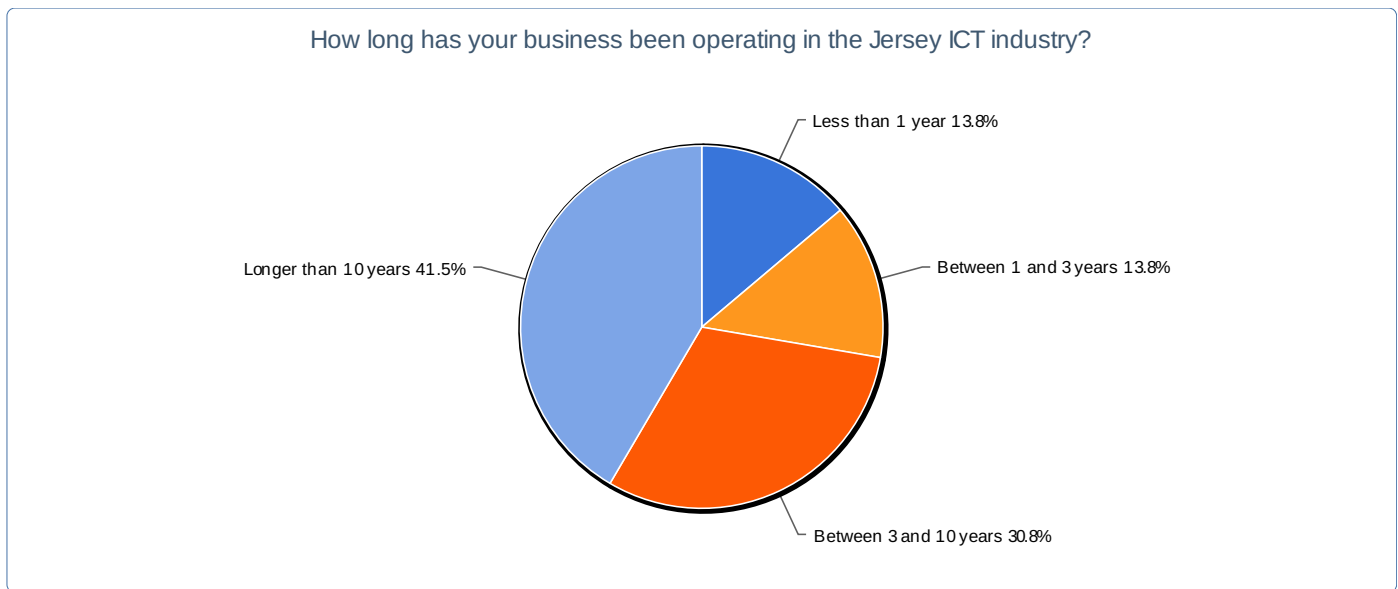
In which countries / jurisdictions does your company do business?

Value	Count	Percent %
Jersey	61	93.8%
Guernsey	37	56.9%
Alderney	6	9.2%
UK	44	67.7%
Europe (non-UK)	32	49.2%
North America	12	18.5%
Asia-Pacific	10	15.4%
Global	15	23.1%
Other (please specify)	8	12.3%

Statistics

Total Responses	65
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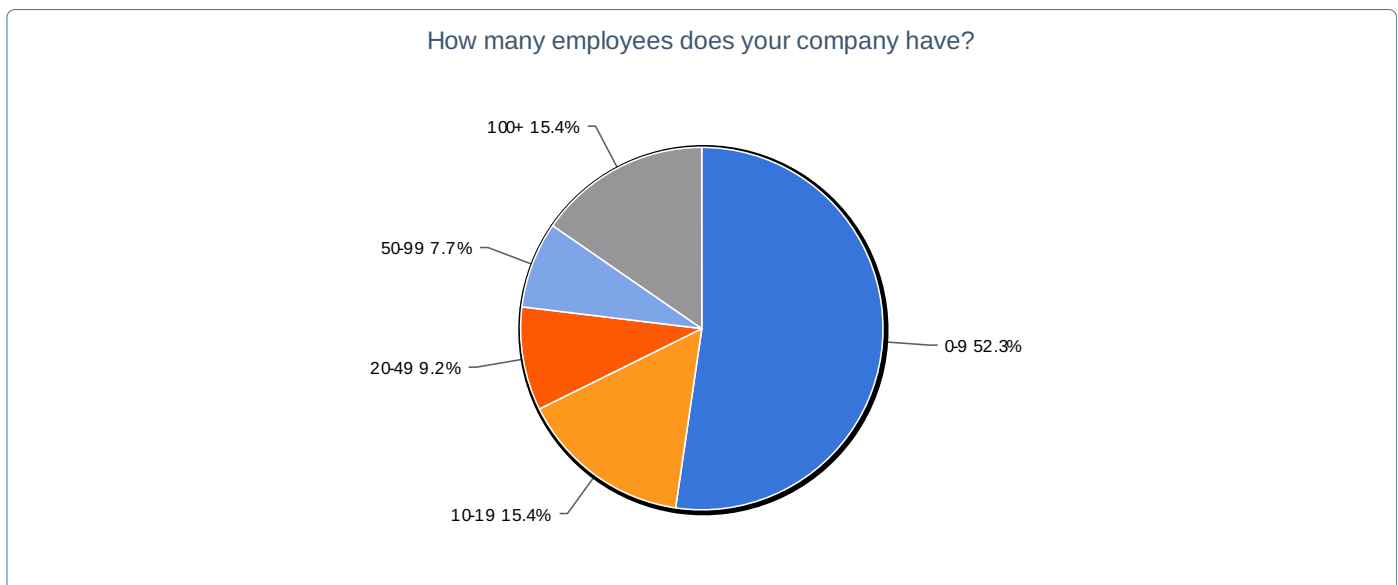
Open-Text Response Breakdown for "Other (please specify)"	Count
Left Blank	1
Africa (Angola and Mozambique)	1
IOM, Cayman	1
Malta	1
Offshore jurisdictions	1
South America, Russia	1
Switzerland! Quite an important one for Jersey...	1
isle of man	1



How long has your business been operating in the Jersey ICT industry?

Value	Count	Percent %
Less than 1 year	9	13.8%
Between 1 and 3 years	9	13.8%
Between 3 and 10 years	20	30.8%
Longer than 10 years	27	41.5%

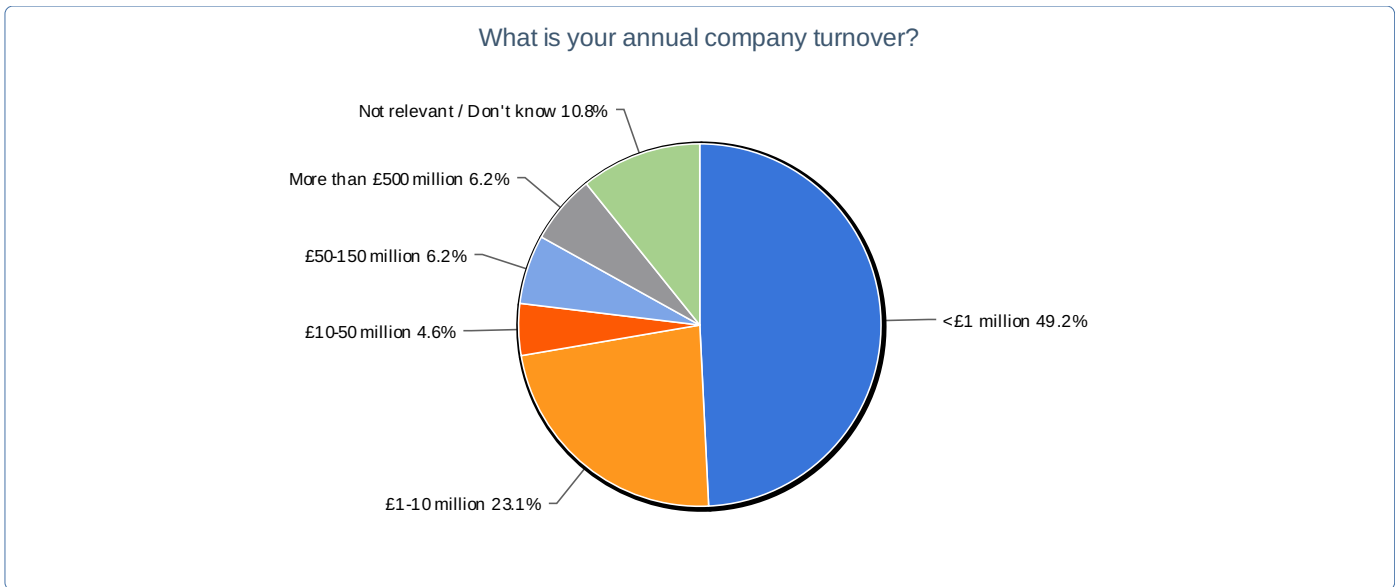
Statistics	
Total Responses	65



How many employees does your company have?

Value	Count	Percent %
0-9	34	52.3%
10-19	10	15.4%
20-49	6	9.2%
50-99	5	7.7%
100+	10	15.4%

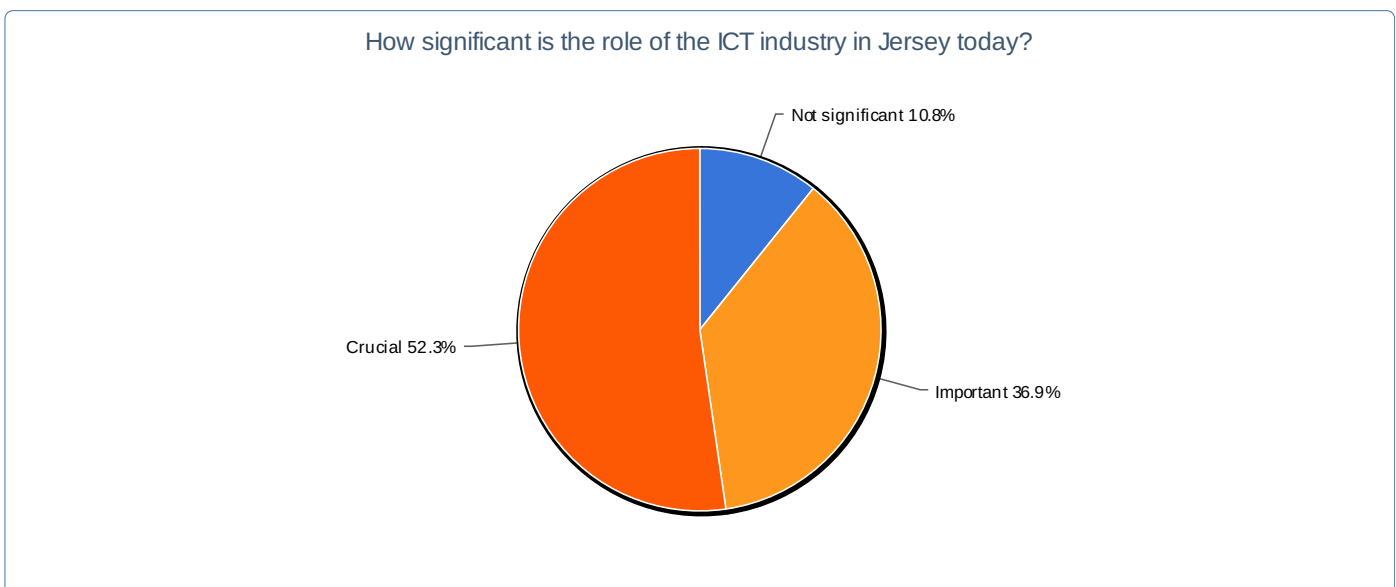
Statistics	
Total Responses	65
Sum	1,470.0
Average	47.4
StdDev	38.60
Max	100.0



What is your annual company turnover?

Value	Count	Percent %
<£1 million	32	49.2%
£1-10 million	15	23.1%
£10-50 million	3	4.6%
£50-150 million	4	6.2%
More than £500 million	4	6.2%
Not relevant / Don't know	7	10.8%

Statistics	
Total Responses	65



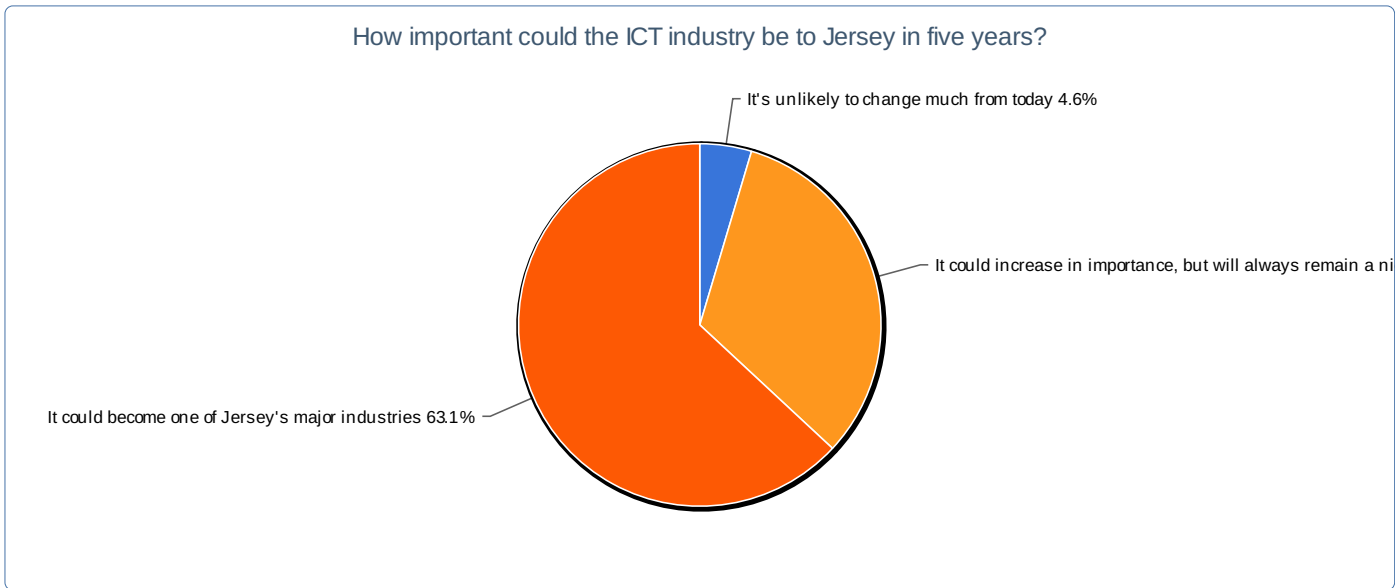
How significant is the role of the ICT industry in Jersey today?

Value	Count	Percent %
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Statistics	
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Not significant	7	10.8%
Important	24	36.9%
Crucial	34	52.3%

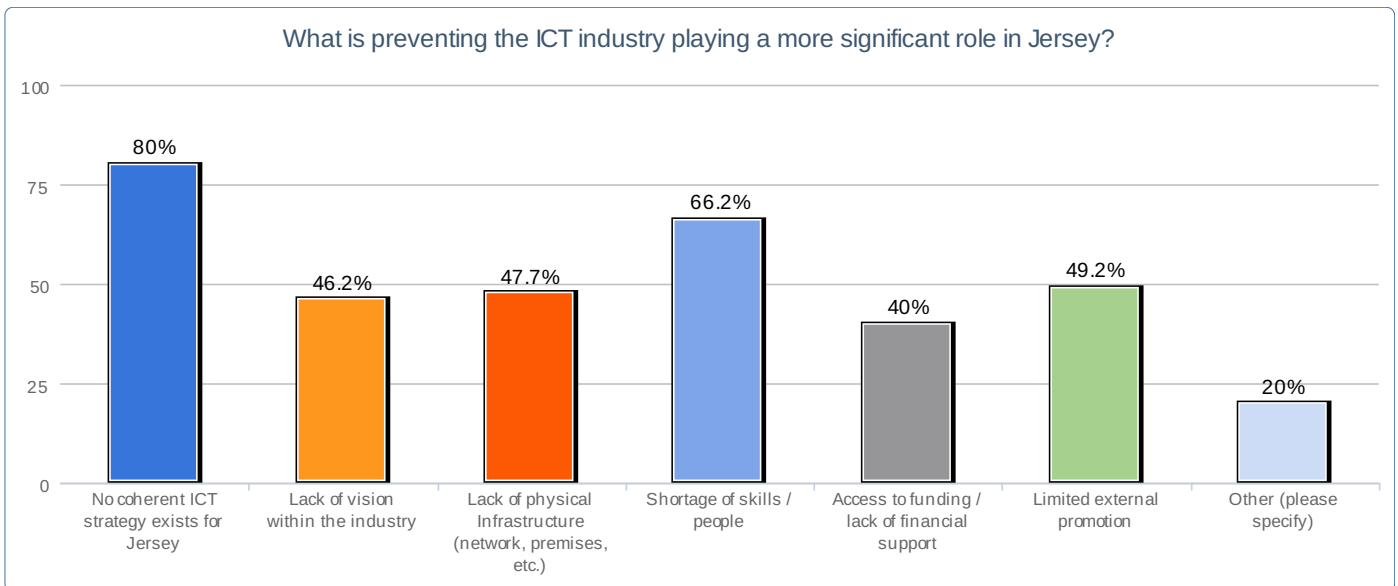
Total Responses	65
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How important could the ICT industry be to Jersey in five years?

Value	Count	Percent %
It's unlikely to change much from today	3	4.6%
It could increase in importance, but will always remain a niche industry	21	32.3%
It could become one of Jersey's major industries	41	63.1%

Statistics	
Total Responses	65



What is preventing the ICT industry playing a more significant role in Jersey?

Value	Count	Percent %
No coherent ICT strategy exists for Jersey	52	80%
Lack of vision within the industry	30	46.2%
Lack of physical Infrastructure (network, premises, etc.)	31	47.7%
Shortage of skills / people	43	66.2%
Access to funding / lack of financial support	26	40%
Limited external promotion	32	49.2%

Statistics	
Total Responses	65

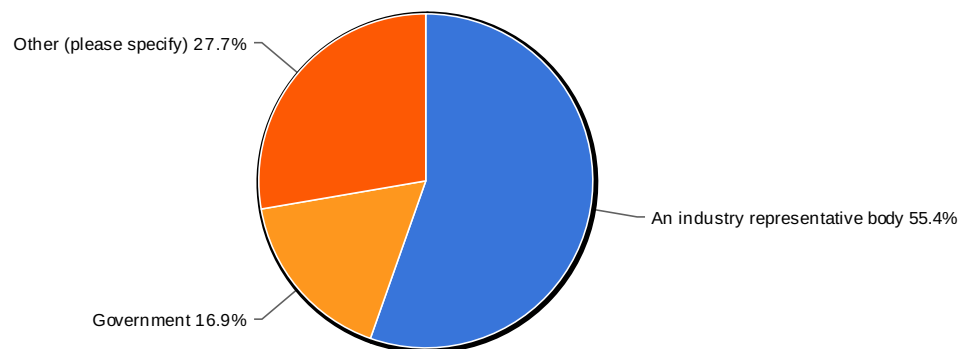
Other (please specify)

13

20%

Open-Text Response Breakdown for "Other (please specify)"	Count
<i>Left Blank</i>	1
Competituoon has caused a lack of centralised vision an dilution of investment.	1
Digital Rights Legislation is lacking.	1
Lack of Focus on Exports	1
Lack of any comprehension on a Government level of any engagement strategy	1
Lack of long term skills development strategy	1
Too many prominent Jersey businesses, including the States, spend their money with UK suppliers.	1
no collaboration between key stakeholders, industry dominated by so called 'experts'	1
no real innovation	1
no recognised body or voice for the industry	1
Too much spoonfeeding of projects/work from the financial sector, too little true innovation and product development	1
Lack of Business Skills in ICT Companies, low understanding of what Finance Industry IT requirements are	1
Lack of ICT strategy hinders external engagement with major organisations. This commitment to Jersey plc can support an engagement to evidence how serious Jersey is about the digital sector	1

Who should be responsible for leading the development of a coherent ICT strategy?



Who should be responsible for leading the development of a coherent ICT strategy?

Value	Count	Percent %
An industry representative body	36	55.4%
Government	11	16.9%
Other (please specify)	18	27.7%

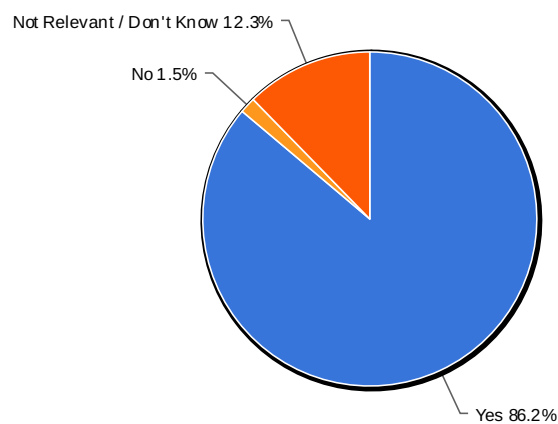
Statistics

Total Responses	65
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Open-Text Response Breakdown for "Other (please specify)"	Count
A strategic advisor	1
An independent expert advisor like the Finance Industry used to have.	1
Government together with the Industries representatives should form a working team	1
Government and Industry	1
Government/Private Sector Group, mutually reinforcing.	1
Industry led, gvoernment support	1
Joint	1
Joint government / industry body	1
Joint industry/government body	1

Pan Industry	1
Public Private Partnership	1
Someone who can effectively execute the strategy as defined by the industry.	1
The UK Government in collaboration with Jersey States Members	1
a mix of the above	1
industry body with support from businesses and gov	1
joint body of gov and ind	1
A combination of key stakeholders including those that historically are perceived as blocking growth. They need to buy in at the outset and drive policy change to enable inward investment and skills migration.	1
Then industry is not big enough here to warrant a cohesive government or industry body approach. The market is very insular and thus too competitive to see a 'forum' of ICT firms developing a strategy together.	1

Would the ICT industry in Jersey benefit from the existence of a permanent working group to inform policy?

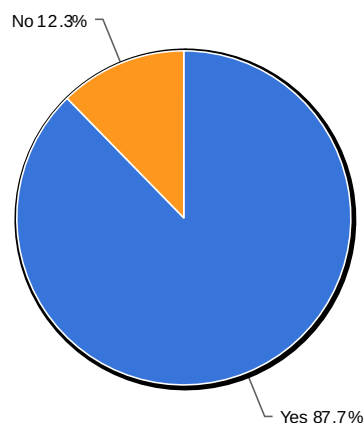


Would the ICT industry in Jersey benefit from the existence of a permanent working group to inform policy?

Value	Count	Percent %
Yes	56	86.2%
No	1	1.5%
Not Relevant / Don't Know	8	12.3%

Statistics	
Total Responses	65

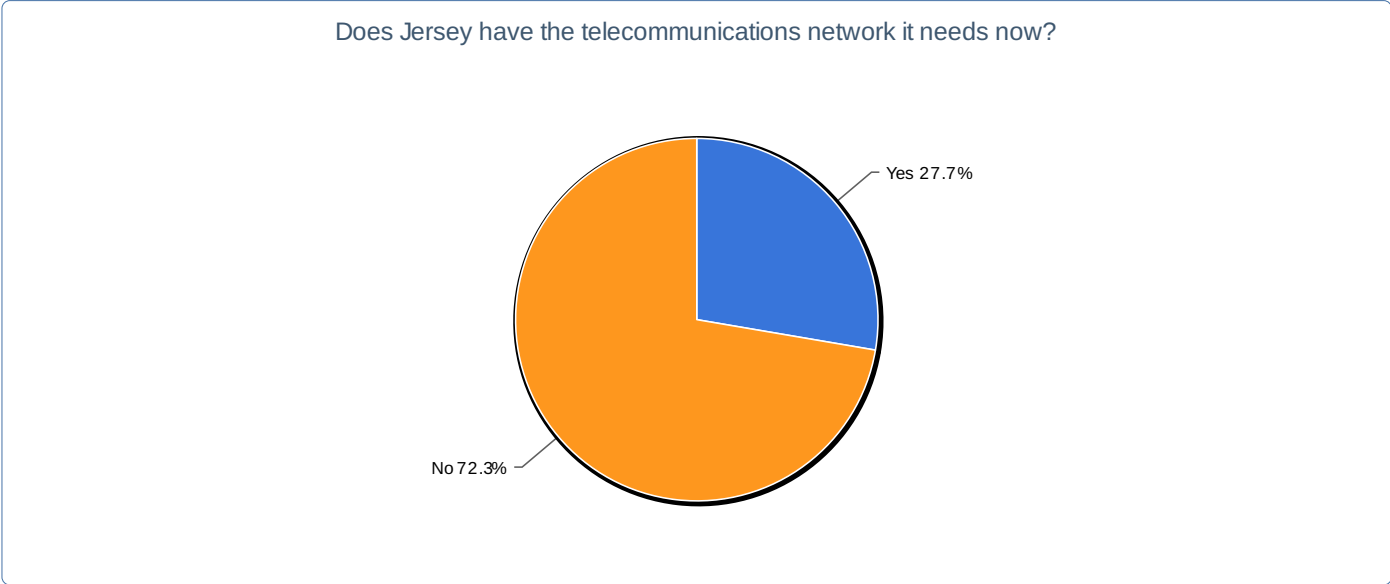
Would the ICT industry in Jersey benefit from a strategic review of its strengths, weaknesses, opportunities and threats?



Would the ICT industry in Jersey benefit from a strategic review of its strengths, weaknesses, opportunities and threats?

Value	Count	Percent %
Yes	57	87.7%
No	8	12.3%

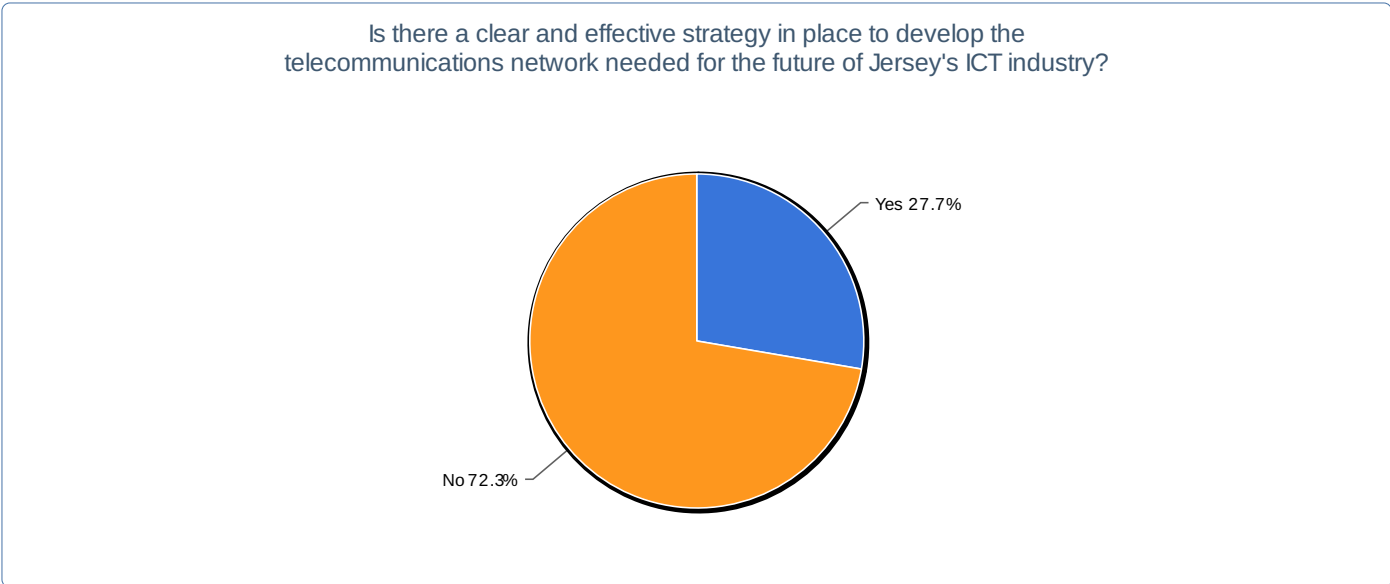
Statistics	
Total Responses	65



Does Jersey have the telecommunications network it needs now?

Value	Count	Percent %
Yes	18	27.7%
No	47	72.3%

Statistics	
Total Responses	65

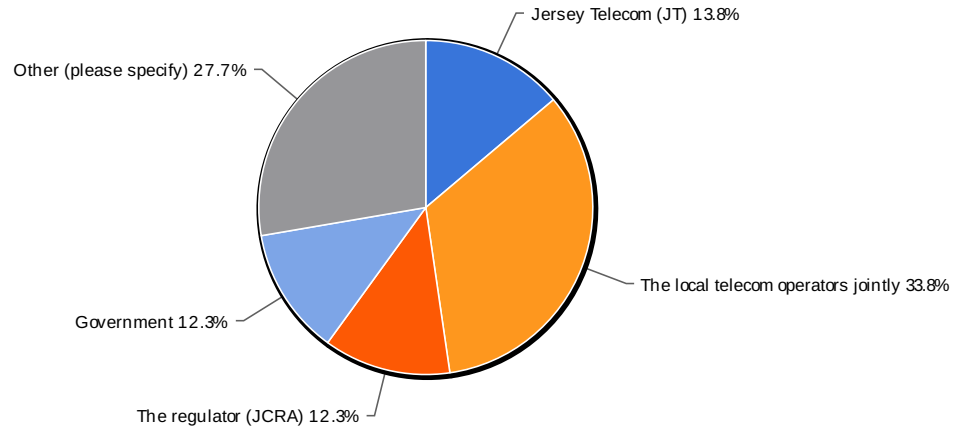


Is there a clear and effective strategy in place to develop the telecommunications network needed for the future of Jersey's ICT industry?

Value	Count	Percent %
Yes	18	27.7%
No	47	72.3%

Statistics	
Total Responses	65

Who should be responsible for setting out and managing the implementation of Jersey's future telecommunications network?

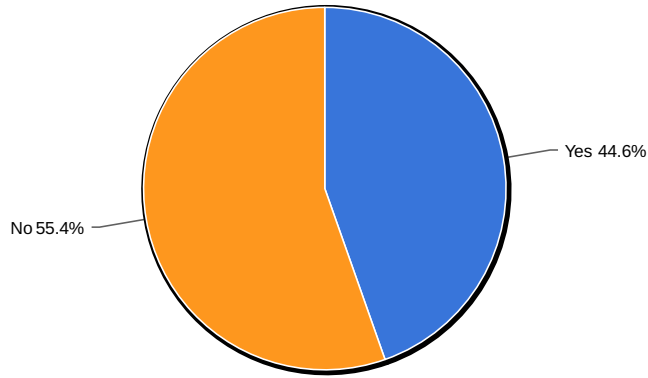


Who should be responsible for setting out and managing the implementation of Jersey's future telecommunications network?

Value	Count	Percent %	Statistics	
Jersey Telecom (JT)	9	13.8%	Total Responses	65
The local telecom operators jointly	22	33.8%		
The regulator (JCRA)	8	12.3%		
Government	8	12.3%		
Other (please specify)	18	27.7%		

Open-Text Response Breakdown for "Other (please specify)"	Count
<i>Left Blank</i>	1
A mix of all of the above	1
A partnership between Government and the operators	1
An industry representative body	1
Government+Regulator+Local Telecom: A working committee should create a unique vision	1
Government and Telcos	1
ICT Working Party	1
Industry advisory council	1
JCRA + industry + Telecom	1
Public Private group including Telecoms	1
The local operators in conduction with the ICT industry representative body (see question 10)	1
industry body	1
It's an industry/customer lead process. Firms then delivery commercial serviced - a regulator or government panel do not have expertise to influence the experts.	1
I think the question is wrong, Jersey may have the network now but the pricing is inhibitive, potentially the JCRA can assist here but JT needs to make a profit to enable diversification and growth. I think that the answer should be 'all of the stakeholders identified'.	1
No easy answer. If operatprs do it profit will be king. Of government or JCRA it will not be effective.	1
the telecoms operators under the direction of the person accountable for the ICT strategy. They are a supplier.	1
irrelevant, this should be driven by customer needs/requirements i.e. whoever requires it should pay	1
This is not clear, as there is currently no strategy on ICT, how can we decide who's best to carry it out?	1

Does Jersey need a technology park?



Does Jersey need a technology park?

Value	Count	Percent %
Yes	29	44.6%
No	36	55.4%

Statistics	
Total Responses	65

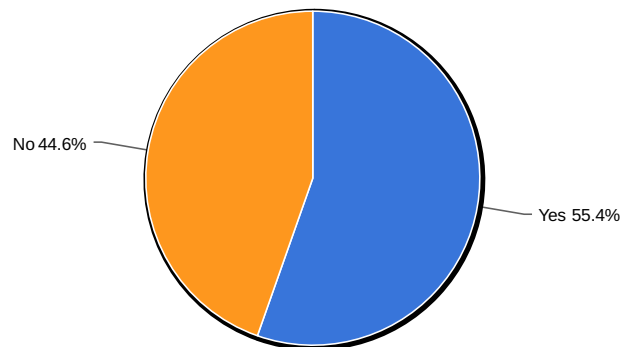
Is it difficult to find skilled candidates in Jersey? Are there any particular IT / digital skills that could make local candidates more employable?

Count	Response
1	Not sure.
1	- Personal blogs - Copywriting - Pro-activeness
1	Analysis
1	Business Analysis Project Management Enterprise scale application development
1	Cisco qualifications
1	Develop the right market and services and skills required will be clear.
1	Developers, SW Sales
1	Encourage more affordable courses
1	Mobile app development
2	N/A
4	No
1	Not enough information to provide a proper reply to this question.
1	Not really employed to date
1	Not sure
1	Software Developers Business Analysts Change Management
1	Software Development skills (product not consultancy) Devignner (Developer designer combo's)
1	Software development
1	Teaching "real-world" programming at A-Level / Highlands.
1	Understanding business requirements, process and information not just writing code.
3	Yes
1	Yes - Lots Of Generalists But Specialists Are Too Niche
1	Yes - so I'm led to believe
1	Yes,
1	Yes, skills in business analysis and crm, .net and sql
1	Yes. Strategy / Project Management
1	Yes. Specialist technology skills are in very short supply.

1	Yes. Baseline HTML5, CSS, .NET Framework
1	aa
1	high level technical skills across the board
1	web development HTML/CSS production digital marketing (not social media)
1	Embrace the creativity of this business sector. The next generation of wealth will be borne out of creative thinking that satisfies demands...known, future or aspirational. The development of new business opportunity has now no boundaries, or in broad terms 'restricted set thinking' indeed the best and brightest e-businesses possibly have not yet been conceived. Embrace visionary thinkers.
1	Regarding Q 16, you need a further info box (which I am now hijacking this one for) - You should be asking "Why" before the question so that people can provide more feedback to enable you to drive strategy. A simple Yes / No will not aid your cause. A digital hub more than a technology park will encourage innovation and entrepreneurs. A technology park to me, sounds like another cluster of data centres making a blot on the landscape where as a Digital Hub could create a community in a run down area of town (Colomberie for example). Regarding Ans for Q-17 - I have tried to secure local Gov support for UK training using available local graduate budget for an advanced / accelerated deep dive dev' 1 year UK based (1 week in 4) apprenticeship. We were offered 10% support whereas the 3 year cost of training a local grad' (which is available only if they train locally over 3 years) was equivalent to 50%. We had the graduate, the course and the money but not at 90% so we withdrew from the matter.
1	Proper training on traditional degree courses rather than 'fashionable' hybrid degrees. Base this on far more in depth ICT in schools. Not being taught coding until A level (or barely at all) is ridiculous.
1	Yes, inevitably the labour pool is limited but lack of skilled candidates is not a major barrier to business.
1	Ask employers what they are looking for and teach these skills at Highlands College only if there are substantial gaps that can not be remedied by day training courses.
1	There is a preference from all Telecom companies for employing outside people. This has been made worse after JT made 25% of the workforce redundant & Airtel came in with Indians & C&W with Guernsey people.
1	Haven't tried to recruit locally (yet), however, place a lot of value on varied industry experience - which by it's nature can be tricky to acquire on-island. More focus should be given to "vocational" style courses e.g those offered at Highlands, however.
1	It is difficult to find skilled candidates in Jersey. Lack of training programmes, graduates specifically
1	Yes it is difficult. Higher education in IT sector should be encouraged to make locals more employable
1	There are many skilled candidates from Jersey and studying within Jersey education. However, the extreme gap in cost of living between most areas of the UK and Jersey encourages skilled graduates and candidates to remain in the UK. We require a general 'culture of living' that is fairer and less biased towards the finance industry if 'new' industries such as ICT are going to make an impact.
1	Yes. Schools & Colleges are not producing young people who aspire to join this industry. That's almost certainly for a variety of reasons but IT is not the glamour industry that it was perceived as 20+ years ago. In Jersey in particular graduate calibre students can earn appreciably more in law, banking, trust, fiduciary, etc. They'll be part of the business - acknowledged and appreciated. Inside those businesses as an IT professional they'll be an overhead - necessary but resented. So why join IT? We need more skills in local candidates but we need a massive change in attitude amongst business leaders.
1	I think the colleges and schools do well in this area and the rest is industry training and experience.
1	Generally, UK universities and colleges have not been producing graduates with immediately useful web dev skills - the faculties always seem to be a few years behind the state of the art. As a smaller college, Highlands could be much more focused on what is commercially valuable than the big UK institutions. So relevant skills are in short supply locally, but the bigger challenge is local candidates with the right attitude to work. That's a change that will take some years as the realities of the extended recession kill off Jersey's traditional complacency.
1	No experience is crucial in the development of such technologies, natural progression will fill roles in time but in the short term external resource is critical to ensure success.
1	Yes it is. Microsoft skills, Developer skills, Virtualisation and Storage skills, Secure Programming, Database and Business Intelligence skills and encouragement of computer science degree graduates back to the island.
1	Unsure - not convinced either way. Saying that the availability of subsidies for locally available training courses to promote suitable skill growth would seem a usefull way forward
1	Candidates need to be prepared to update their skills as technology changes. We also should be looking at better training to develop skills within the island.
1	A UK based business could obtain skilled staff at c. 50% of the Jersey cost. Need to allow the company more benefits to cover these higher costs otherwise the technology will be actively used to outsource roles out of Jersey.
1	a wider range of skills beyond the usual Microsoft Toolset would add much needed versatility to the islands ICT skill base

1	rounded skills, currently candidates are either enthusiasts. Generally the brightest of the island's youth choose a career in law/finance etc.
1	From a print provider the skills that are missing are:- Industry awareness. Technical Capability to get the best from the equipment. Software knowledge
1	Yes, it is difficult and the current way that the ICT industry works doesn't necessarily promote the upskilling of local staff. I'd like to see local IT professionals broaden their skills because the IT industry isn't just about technology.
1	Yes an Educational system that actually provides students with the base technology skills to compete with their UK Counterparts - the level of IT Education in Jersey is abysmal
1	Proper computer science degrees. Education that keeps pace with technology as well as still doing the basics.
1	not necessarily, but excellent delivery and execution of projects that involve IT as a stakeholder/supplier is a must
1	No. Plenty of young technically skilled people they just need to be given the chance rather than bringing in people from the UK all of the time.
1	Software Development skills are lacking. Client-focused consultative skills are lacking. Experience of the ICT vanguard is lacking for obvious reasons.
1	From what I am told it is difficult to source skilled employees in Jersey. In relation to question 18, I do not think the issue is employment law as such, it is more related to housing and regulation of undertakings.
1	Yes - online marketing knowledge and experience and basic computer studies qualifications along with development experience.

Is Jersey's employment law a barrier to securing competent and technical individuals?

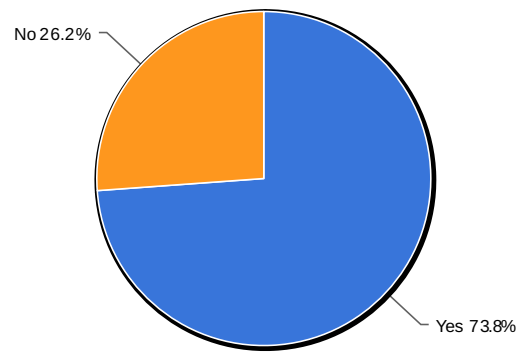


Is Jersey's employment law a barrier to securing competent and technical individuals?

Value	Count	Percent %
Yes	36	55.4%
No	29	44.6%

Statistics	
Total Responses	65

Do you think that the government should offer grants to promote innovation within the digital industry?

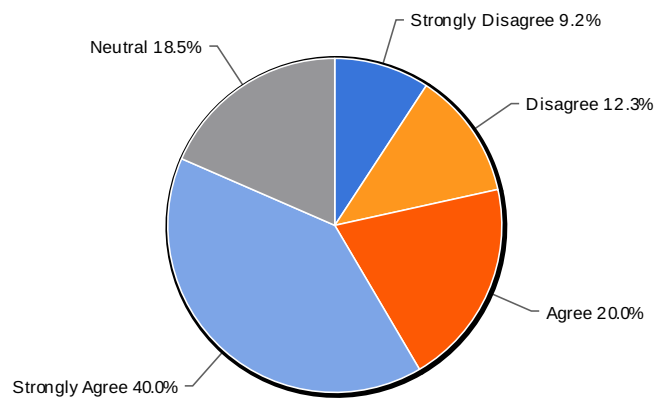


Do you think that the government should offer grants to promote innovation within the digital industry?

Value	Count	Percent %
Yes	48	73.8%
No	17	26.2%

Statistics	
Total Responses	65

The government should provide tax incentives to promote private investment in the ICT sector.

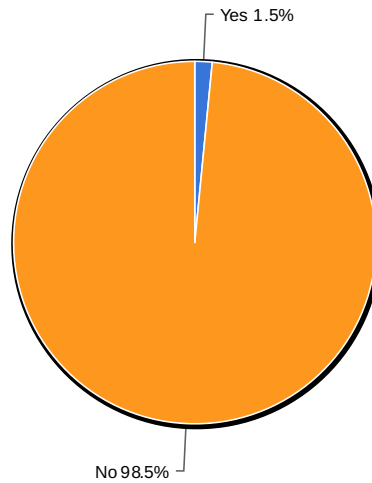


The government should provide tax incentives to promote private investment in the ICT sector.

Value	Count	Percent %
Strongly Disagree	6	9.2%
Disagree	8	12.3%
Agree	13	20%
Strongly Agree	26	40%
Neutral	12	18.5%

Statistics	
Total Responses	65

Does Jersey promote itself sufficiently to attract digital industries?



Does Jersey promote itself sufficiently to attract digital industries?

Value	Count	Percent %
Yes	1	1.5%
No	64	98.5%

Statistics	
Total Responses	65

What external marketing activities are needed to promote the ICT sector?

Count	Response
1	aa
1	.
1	?
1	A broad based, industry-led body to attract global eCommerce
1	A similar approach to that provided for the finance industry by Jersey Finance
1	An industry body similar to Jersey Finance role to the Finance sector
1	Attendance at relevant trade fairs, website, a go-to person.
1	Coordinated promotion outside of jersey
1	Developing a "Jersey" ICT proposition is required first
1	Do whatever IoM is doing. They seem to be attracting businesses.
1	Don't know
1	Don't know.
1	Government civil servants should be able to do this as us the case in the rest of the world.
1	Industry awareness campaigns
1	Internet Adds
1	It's more about having an strategy and the industry working together to present a common image
1	Jersey summer of code
1	Lifestyle
1	More
1	More resources, more focus an implementable marketing plan tied to a clear digital strategy.
1	None from a Government perspective, it should be industry lead.
1	Not sure
1	Not yet ready to be marketed. Where is the Jersey USP?
1	PR on Broadband Isles to attract companies that can utalise Jersey as a testing ground.
1	Presence at large industy exhibitions and conferences.
1	Promote Jersey's Strengths & Tax Treatment
1	Provide clear examples of how the IT industry is key to the finance industry.

1	Show there can be benefits to 'offshore' hosting. Tax, regulation etc.
1	Unkown
1	Unsure
1	Until there is a coherent approach outside marketing could be potentially counter productive.
1	We first need to establish Jersey as a center of innovation
1	online marketing
1	partnering with external companies
1	promotion and new legislation to attract niche clients
1	tax incentives to do R&D in Jersey for small as well as large companies.
1	trade shows and industry publication
1	unknown
1	more information on our good infrastructure and promotion of jersey's IT skills for the finance industry
1	Need something to market first. "Gigabit Isle" seems a positive way forward, just need to ensure it happens.
1	Similar to what Jersey Finance does for the Finance Industry. Communications plans, websites, printed media, sector commentary, source of comment, attendance industry related events, supply of tools and resources to help the promotion of the ICT sector, dedicated website, ICT sector representation.
1	Open for business message Targeted approaches to key players in line with mutually convergent strategy.
1	Provide and promote links to education and local community and how stronger ICT can benefit Jersey.
1	Local experts and industry leaders need to be seen at technology conferences with the support of government officials.
1	Jersey is small and most Telco suppliers outside of the UK don't know of it. Marketing might help but realistically we are minuscule.
1	Why market externally when the rest of the world has passed you by - eFulfillment - eGaming- IPR- the list goes on
1	Tricky to answer in a concise fashion, however, I'm not aware of any which take place on an island wide basis - only the efforts of individual businesses?
1	The ICT industry needs to consolidate and work together to send out positive messages within the Island. At the same time it needs to collectively target external individuals, companies, intermediaries and events to raise commercial awareness about Jersey as an ICT destination. It then needs to liaise with the relevant authorities to ensure opportunities are converted.
1	invest the marketing budget in local businesses (i.e. in a form of grants or tax breaks) and then publish case studies and success stories online networking online PR and reputation building partnerships and joined events with large companies such as Microsoft, Facebook, Google, IBM etc.
1	If a ICT body or voice is formed to represent the industry then part of their remit should be to look at ways to promote the sector outside of the Island.
1	- Closer ties with large ICT companies, both in UK and world-wide - Delegation to UK to lobby business leaders (led by Jersey business leaders and government representatives)
1	Leadership and vision, in developing markets not infrastructure. Offer blue sky thinkers a welcoming base or 'hot house' in which they can develop...ideally with the island intelligent players able to interface and realise these opportunities. Understand, that in the main the new generation of e-business leaders are not from traditional schools of thought, therefore difficult to identify in marketing terms. Environment for creativity, solid base for development and seed funding, facilitation services locally feeding off inspiration. This new environment is impossible to pin down, uncontrollable to government, not understood by regulators. New thinking....from the outside in, not the inside out. I was a consultant for the government e-team initiative in 2000 and a lot of good ground work and successes achieved, this was a marketing driven assignment, we won the tender on this principal, whilst the ICT offered infrastructure. Opportunities missed through lack of cohesive industry working on the bigger picture, the island needs to work on a strategy that empowers this sector to present a broad intelligence and wide knowledge economy as a key pillar in promotion externally. The drive must be 'what people want, how we can facilitate' over what we can offer, business is not about build it and they will come, it is about convincing them we are their natural partners. A lead that has been lost.
1	Government need to make some big changes (looking beyond tax incentives). The financial services industry is not a sustainable long term option. Once changes have been made and Jersey has a unique value proposition that can be used to attract investment, only then can marketing activities be considered to drive value.
1	Awareness of what is already here and the potential for growth. Case studies of how existing technology businesses have relocated to Jersey
1	Ed Daubeney is presently trying to create support for an eCommerce quango akin to Jersey Finance, personally, I think the two are closely intertwined and should be promoted as such even if it is 80/20 (Fin / ICT) it will greatly help and provide further comfort to Fin' Serv' businesses considering setting up if there is a robust and diverse skills base to support their endeavours.

1	Major global technology events Marketing in industry recognised publications Greater Social presence
1	Chicken and egg - the only thing that will really sell the island is world class work, showcased effectively, around a strong brand. The Digital Jersey brand could have a role to play here. But the outside world will only pay attention if we have a stream of "wow" projects to show off.
1	Each part of the ICT sector that has outbound services should promote to it's target audience as it does today. If we are going to start new services then we decide on those servcis and market them accordingly.
1	If Jersey has a world-class ICT industry, then the industry needs to start marketing itself as such. Local companies need to get out there and start promoting what they do, for example by speaking at international events, joining standards bodies, etc. I always get asked the same question when speak at organisations/events around Europe ... "is there really that much IT in Jersey?".
1	actually market the island as a solution to a range of ICT issues within a stable base. Don't just focus on financial firms but cross promote across the entire spectrum of UK and european clientele. Also make use of links with other offshore dependencies and asia before we're beaten to the punch
1	Advertise to the financial services industry as an Offshore IT centre of excellence. Almost as important to market to Jersey organisations to ensure they don't immediately go outside the island for their consultancy.
1	JT's Jersey Labs initiative is a good example. A coherent marketing program emphasizing Jersey's technical and tax strengths for IT startups would be very helpful. We need a Jersey Finance for technology.
1	What is it that we would market? Jersey has a finance industry but it is the regulation and resources that attract businesses.
1	Put in place a well understood & coherent ICT strategy before any serious marketing - then it makes more credible sense to begin talking externally
1	Depends on who and what about ICT you are trying to promote, but could be something like Jersey Finance representing the industry as a whole.

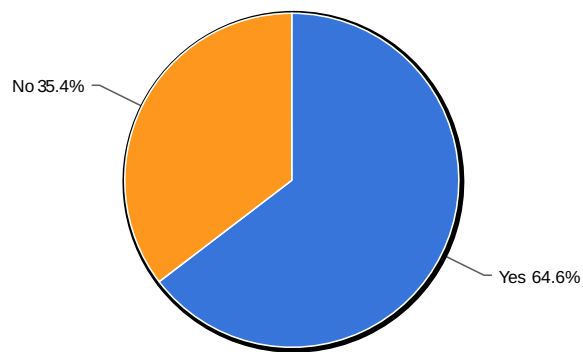
What are the key strengths of the ICT sector in Jersey?

Count	Response
1	aa
1	.
2	?
1	Agility, knowledge, high degree of skills in a very small area
1	Breadth, financial skills
1	Capability For Growth - More Skills Than Other Competitors
1	Compact network, near Europe and demanding. Driven by Finance sector and desposable income.
1	Concentrated skills, financial benefits, IT
1	Depth of knowledge, education and attitude.
1	E-commerce centre of excellence as a result of fulfillment boom.
1	Entrepreneurial flare Large financial industry with global reach
1	Entreprenuerial approach and broad based IT skills
1	Expertise in Finance and zero tax for companies.
1	Finance and web
1	Flexibility.
1	Focus on business needs Qualifications but in the wrong spaces Agile Cross skills
1	Good connectivity beyond the channel islands, good hosting infrastructure.
1	High quality, not very high quality though and that is what we should be aiming to achieve.
1	I do not know if Jersey has any strengths in this area
1	I'm unsure but I guess the nature of Jersey being an island and the relationships this brings.
1	IT follows the money.
1	JT innovation
1	Jersey has high quality people with experience in complex configurations.
1	Location/resilience/excellence in telecommunications infrastructure - unique globally.
1	Not enough information to provide a proper reply to this question.

1	Not sure
1	Offshore
1	Pockets of excellence (probably funded by the finance industry.)
1	Scope
1	Sector specialism (e.g. Financial Services).
1	Stability & experience in mature development and service provision.
1	The ability as a small island to move quickly with developments
1	The same long list as the strengths of the Finance industry plus entrepreneurial skills
1	finance application development, understanding of finance in general
1	none
1	offshore expertise
1	people skills, offshore expertise, infrastructure,
1	resilience & flexibility - and many finance aware people around
1	they are local.
1	We've all been pulled up to perform at an international level by the expectations of our demanding and very professional primary industry. But realistically, we have no single USP that beats off the competition.
1	Jurisdiction SHOULD be a key strength, although I won't comment on if it really is or not - offshore hosting etc could present advantages, not to mention security/stability/et al.
1	Are there any, aside from the determination of a small number of entrepreneurs. Jersey's infrastructure is too expensive to work from, the external communication costs are not competitive, the key skills are in short supply
1	We have a very varied skill base, and the close proximity of everything will allow us to test and trial emerging mobile technologies
1	- Highly evolved telecomms network - Advantage of being able to gain close access to government and officials - Proximity to both UK and mainland Europe - Highly skilled, locally educated graduates and school-leavers - Excellent education system
1	Improving telecoms linked to good local laws that can be changed relatively to grasp opportunities
1	A good but limited skill pool, stable government, good legal skills and good financial skills, good connectivity to the outside world. Strong IT infrastructure skills in support of the finance sector. Law making ability, ability to move quickly to seize opportunities.
1	Our geographical restraints ensure that we remain a closed eco-system that can be used to pioneer future technologies and behave as a working model for larger communities.
1	Knowledge economy and people network that already exists, yet unempowered. Global connections in place already.
1	We have a large amount of ICT staff thanks to International banking and all the other offshore growth.
1	Being honest, we just about have capability and capacity in the local market, if you look out of the Island at other jurisdictions we are well placed but that is primarily due to complementary services (legal / HR / Finance / Schools / Quality of life). Personally I think ICT (having spent this year researching other providers and locations) is not as advanced as it ought to be to support Jersey PLC and I am greatly concerned by this. Regarding Q24 - you should have a 'both' option.
1	- Skilled and professional workforce. - Experience of financial services. - Understanding of organisational structure and hierarchy. - High level of service quality and retention. - Geographical location (close to both the UK and Europe). - B2B
1	Closeness and responsiveness to individual businesses, in depth understanding of Offshore business requirements.
1	Educated work force, tax structure for businesses, 4G, fibre op, finance sector, government interest
1	Experience of working in financ sector demands a vertaion rigour, and ensures it companies have controls in place to deliver quality.
1	ICT and E-Commerce etc are already well developed sectors of the commercial scene in Jersey. Most impotantly they are sectors that are perfect for Jersey in theat they are high value and not mass employers and geography is not a huge determining factor on location.
1	It should be that we have unique skills and knowledge shaped by the presence of the finance industry to be offer products and services managed out of Jersey on a global level in similar FS sectors
1	A wide variety of high calibre individuals. But from the outside I suspect it looks like a lot of very small businesses none of which have much strength in depth. The core infrastructure (data centres and networks) are very sound and they have some fantastic clients that they can reference.
1	Nimble, quick to react. Knowledge and skills - although there is a shortage of these. Understanding of the finance industry.
1	Attractive environment Stable resource base Proximity to financial customers Increasing professional image

1	I find IT providers in Jersey to be sub standard to UK providers that I have worked with at my previous firms in the UK. The breadth and depth of experience is just not there. Very expensive, prohibitively so, and against UK standards customer service very poor due to the perceived lack of choice of alternative providers.
1	Finance industry is exacting in its demands. The ICT sector has met those demand with appropriate expertise and these are transferable to other economic sectors.
1	IT services to finance (development/support) IT services to online retailers Data centre provision Managed services (early state)
1	The local ICT sector understands the challenges of the local businesses (e.g. data jurisdiction, taxes, etc) but I'm hard-pressed to identify "key strengths". There *are* pockets of local excellence though, just not across the board. It's worth bearing in mind that I have a relatively narrow view of the industry as a whole being that I specialise in software development and I've only been back in Jersey for 3 years. I wouldn't say that software development is a key strength though.
1	stable jurisdiction with a number of large corporates on the Island ca. 300 professionals working/interested in the ICT industry potentially tax efficient? access/knowledge of IP law and international law small size/possibly more flexible and able to adopt

Should Jersey focus on growing existing local businesses as opposed to attracting non-local businesses?

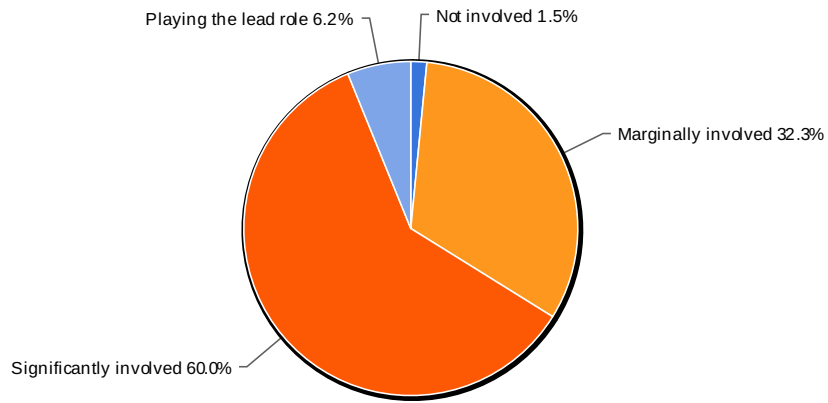


Should Jersey focus on growing existing local businesses as opposed to attracting non-local businesses?

Value	Count	Percent %
Yes	42	64.6%
No	23	35.4%

Statistics	
Total Responses	65

How much should Government be involved in the development of the Jersey ICT industry?



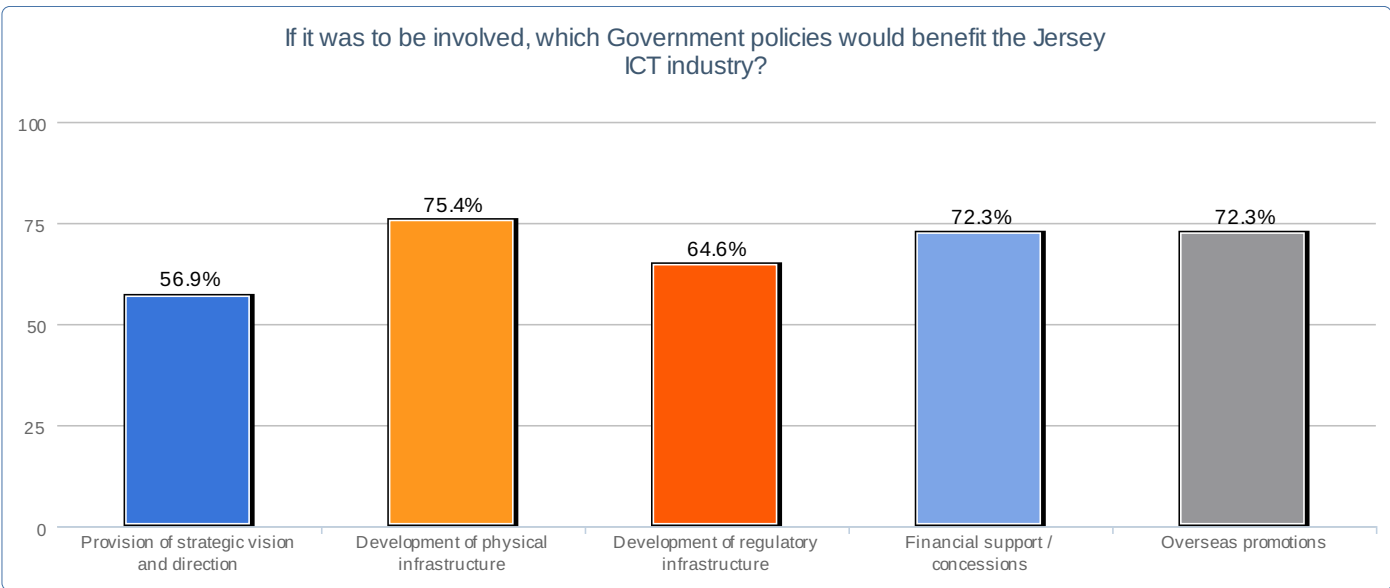
How much should Government be involved in the development of the Jersey ICT industry?

Value	Count	Percent %	Statistics	
Not involved	1	1.5%	Total Responses	65
Marginally involved	21	32.3%		
Significantly involved	39	60%		
Playing the lead role	4	6.2%		

If it has a role in Jersey's ICT Industry, which government department should be driving it forward?

Count	Response
1	.
1	???
1	A new deparment should be formed
1	A new one
1	A new one that rules over all outbound industry not just ICT
1	At present none are capable of any stratgepic initiative
1	Dont Know
3	ED
1	ED, if they get their bloody act together
9	EDD
1	EDD/ISD
1	EED
1	Econ Dev
8	Economic Development
1	Economic Development ?
1	Economic Development, Treasury
3	Economic development
1	Economy
1	Enterprise
1	Enterprise / Inward Investment / RUDL / Housing
1	Industry
1	It needs a specialised technology department
1	JEDI
1	Most likely Economic Development? Another tricky one, though.
1	New department is needed if not a ppp

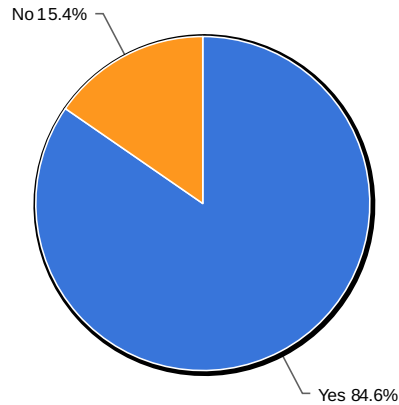
1	No idea.
1	None.
1	Not enough information to provide a proper reply to this question.
1	Strategic investment in focussed education
1	Treasury
1	Whichever department initiates Digital Rights Legislation, in combination with the JCRA.
1	aa
1	development and enterprise
2	don't know
1	don't know - economic dev perhaps? it's more about people than department
1	dont know
1	economic
1	economic delevopment
1	economic development
1	economic development?
1	finance & economics
1	it and enterprise jointly
1	Perhaps a combination of SoJ's internal IS function (given they are probably the largest consumer of technology on the island) and EDD
1	Economic Development for providing funding for the infrastructure as this is an essential facility.
1	A new body as defined over 10 years ago, a global development agency, with a non island business attraction mandate.



If it was to be involved, which Government policies would benefit the Jersey ICT industry?

Value	Count	Percent %	Statistics	
Provision of strategic vision and direction	37	56.9%	Total Responses	65
Development of physical infrastructure	49	75.4%		
Development of regulatory infrastructure	42	64.6%		
Financial support / concessions	47	72.3%		
Overseas promotions	47	72.3%		

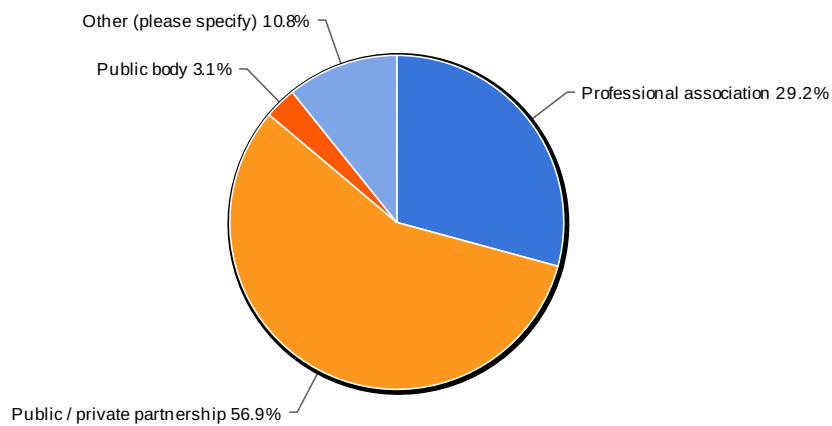
Would the ICT industry in Jersey benefit from a promotional organisation based on a similar model to Jersey Finance?



Would the ICT industry in Jersey benefit from a promotional organisation based on a similar model to Jersey Finance?

Value	Count	Percent %	Statistics	
Yes	55	84.6%	Total Responses	65
No	10	15.4%		

If there was an ICT version of Jersey Finance, what structure would be the most appropriate for such an organisation?



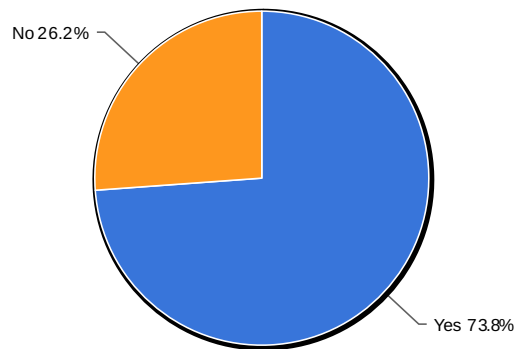
If there was an ICT version of Jersey Finance, what structure would be the most appropriate for such an organisation?

Value	Count	Percent %	Statistics	
Professional association	19	29.2%	Total Responses	65
Public / private partnership	37	56.9%		
Public body	2	3.1%		
Other (please specify)	7	10.8%		

Open-Text Response Breakdown for "Other (please specify)"	Count
I don't believe this is warranted. ICT is not anywhere near the scale of Jersey Finance	1
involvement from smaller firms is a must. It can be lead just by the gov and big firms	1
it's just need one person (impartial) with buy-in from all parties and gov support	1
Jersey Finance is a trade association. Until there is critical mass in this sector there should not be a body like Jersey	

Finance for ICT sector. Give should be responsible for developing this sector until critical mass creates demand for an ICT trade association. Goby shouldn't use an outsourcing solution like Jersey Finance just because the Government departments don't have personnel with relevant expertise. The public vote in politicians to direct civil servants to develop new areas of the economy.	1
I'm not sure that it matters so much, provided it has very strong ties with the local industry (i.e. not government focussed)	1
Industry body, that operates to compliance and government regulation. Yet is totally driven to develop inward business. Infrastructure whilst important will not guarantee inward flow, it will naturally help.	1
Would have to make sure we understand what the organisations objectives are before we define its structure.	1

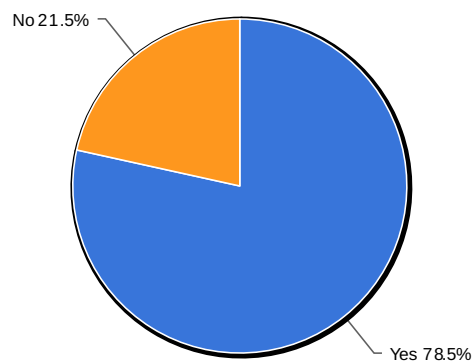
Should the government be actively investing in physical infrastructure to support Jersey's ICT industry?



Should the government be actively investing in physical infrastructure to support Jersey's ICT industry?

Value	Count	Percent %	Statistics	
Yes	48	73.8%	Total Responses	65
No	17	26.2%		

Should the government be actively developing a regulatory framework to support Jersey's ICT industry?

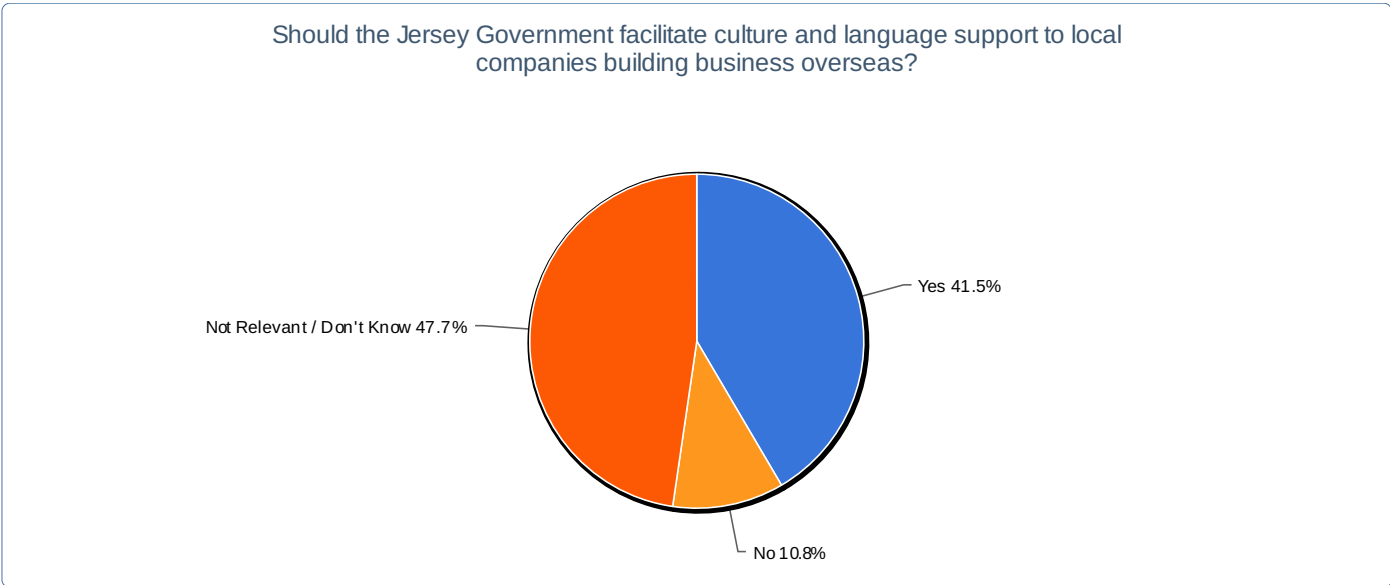


Should the government be actively developing a regulatory framework to support Jersey's ICT industry?

Value	Count	Percent %	Statistics

Yes	51	78.5%
No	14	21.5%

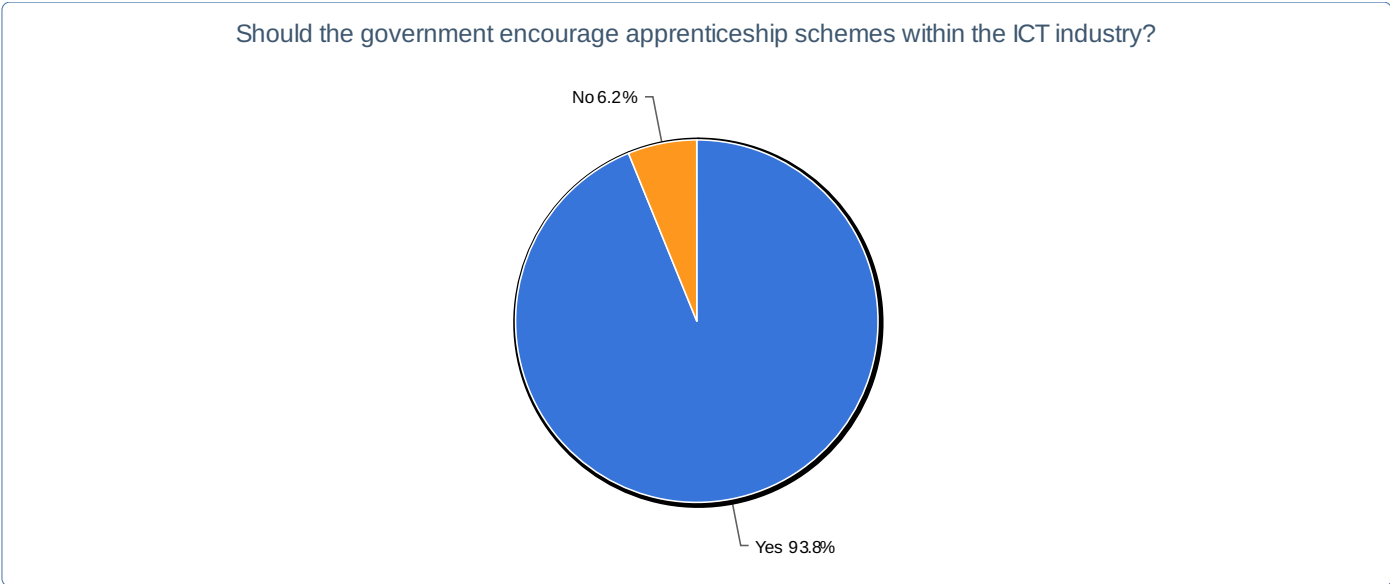
Total Responses	65
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Should the Jersey Government facilitate culture and language support to local companies building business overseas?

Value	Count	Percent %
Yes	27	41.5%
No	7	10.8%
Not Relevant / Don't Know	31	47.7%

Statistics	
Total Responses	65

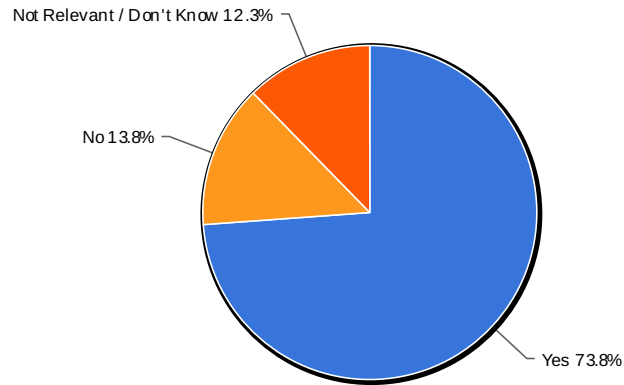


Should the government encourage apprenticeship schemes within the ICT industry?

Value	Count	Percent %
Yes	61	93.8%
No	4	6.2%

Statistics	
Total Responses	65

Should the Government conduct a strategic review of Jersey's strengths, weaknesses, opportunities and threats in the ICT industry?



Should the Government conduct a strategic review of Jersey's strengths, weaknesses, opportunities and threats in the ICT industry?

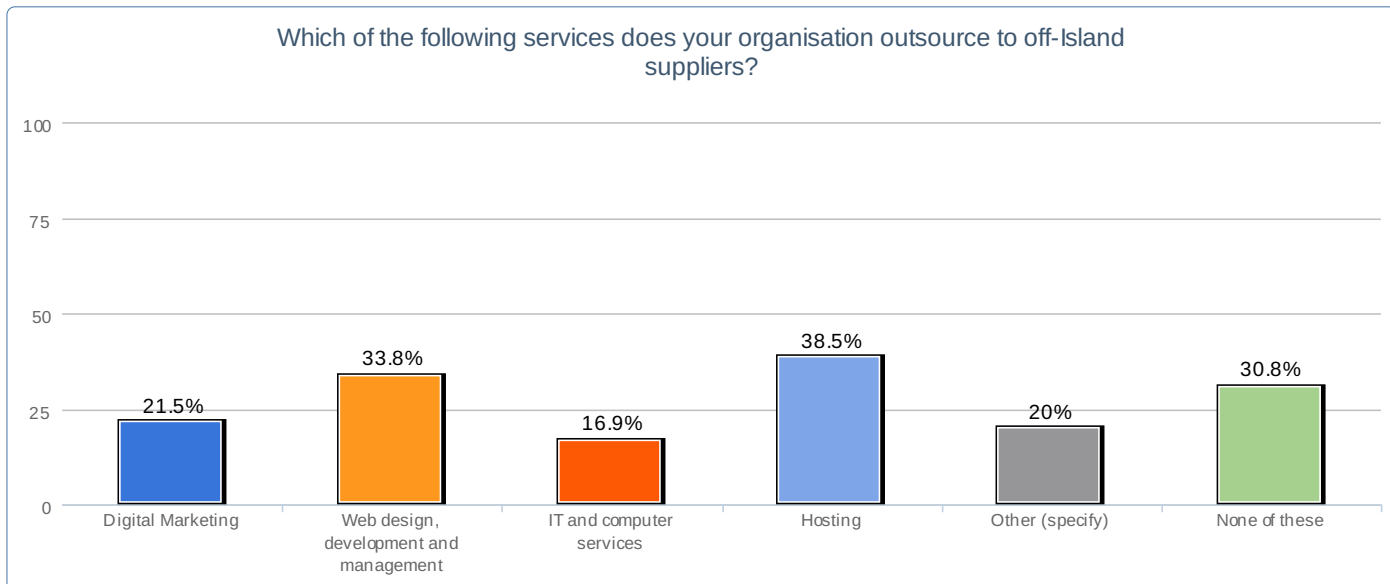
Value	Count	Percent %	Statistics	
Yes	48	73.8%	Total Responses	65
No	9	13.8%		
Not Relevant / Don't Know	8	12.3%		

Which digital industries present the greatest opportunities for growing the ICT sector in Jersey?

Count	Response
1	aa
1	- e-commerce (geographical location and fulfilment infrastructure / experience)
1	.
1	All?
1	B2B consulting, financial services platforms, hosting
1	Content Delivery. Storage solutions.
1	Digital marketing and web design
1	Digital marketing, Financial software development
1	E-Gaming Finance Government?
1	E-Gaming, Cloud Computing
1	Egaming Online marketing Software development and IP
1	Finance, not technically a digital industry, but IT is crucial to its support.
1	Gaming, health
1	Hosting
1	Hosting
1	Hosting & Managed Services
1	I'm not sure to be honest.
1	IPTV
1	Increased broadband connectivity
1	lp
1	JT
1	Knowledge Management, Intellectual Property Management, Offshore secure data hosting and
1	Media, communications
1	Mobile tech
1	Mobile technologies Video services Broadband incubation / pilot

1	Near Field Communication and Contacless Payments
1	Not enough information to provide a proper reply to this question.
1	Offshore hosting, VAT free development services
1	Online services, that are not location dependent.
1	Robotics
1	Software as a service process improvement technologies
1	Software development Web development and related e-industries
1	Software, Hosting & Professional Services
1	Specialist financial areas & related support software in emerging niches, possibly gaming
1	Telecoms / E-Gaming
1	There are many
1	Too new too comment
1	Unknown
1	Web tech. Offshore hosting. Financial software development consultancy.
1	Web, Hosting
1	don't know
1	e-commerce digital marketing mobile services
1	e-gaming.
1	eGaming
1	egaming, hosting
1	offshore private cloud, gaming, e-currency, medical, unified comms,
1	virtualisation global financial services
1	Digital delivery, streaming and downloads, to fill gap left by departure of LVCR. Offshore Infrastructure as a service.
1	At present, Jersey has destroyed it's reputation in the eCommerce - Fulfillment Sector, eGaming has passed Jersey by, IPR is being established in Guernsey and other jurisdictions, until Jersey creates an infrastructure that can support an ICT growth, all that can be done is to support existing business.
1	Normal business and lifestyle supported by good, cheap comms. Nothing artificial, just good value and high quality. We need to become a suburb of London, not some remote high priced Island.
1	- Intellectual property - Consultancy - Professional ICT services - Internet search - Online marketing services
1	virtualisation, holistic upgrades for existing large offshore organisations to reduce cost of running businesses offshore
1	Difficult to say as very opinion led - there are definitely opportunities for the islands in the creative sectors (design, development, innovation).
1	To improve competitiveness for the finace sector. IT is one of Jersey's weaknesses so a focus on infrastructure would take Jersey up to a baseline with finance industry offshore competitors in the Far East etc. This needs to happen to keep Jersey in the game. may stop Jersey businesses relocating to Singapore and Hong Kong due to poor network speeds in Jersey at a very high price.
1	Depends on what infrastructure can be implemented and how the island interacts from a tax perspective with overseas.
1	Hosted Cloud Services - the margin's are massive thus the tax revenue's are largest for Jersey - digital transmission of music/other similar is tiny margin so pointless. The former generates more employment as well whereas the latter does not as it is automated and technology lead not people lead.
1	No single industry is going to have significant growth and so Jersey needs to able to support a number of smaller industries for eg. Intellectual property rights, Gaming, eGaming, infrastructure as a service and hosting, offshore cloud services ie. digital tv, secure data storage, test labs, virtual currencies, new emerging technologies, delivery of software as a services in our tax advantageous offshore location.
1	Compete for online business currently domiciled in Luxermbourg / Ireland Online retail services targeting far-east markets In truth all digital service opportunities need to lead with an IT service underpinned with a small or large tax benefit.
1	Those largely unknown or developed in this fast moving innovative sector. Facilitation of creative ideas...
1	In general, those which have synergies with Jersey's existing primary industry. So, for example, services to businesses domiciled in Jersey for strategic or fiscal reasons.
1	Incorporation of startup software companies, house regulations that allow a technology park to employ scientist and give them a good tax deal etc.
1	E-gaming, Software as a Service, a full range of E-Commerce Consulting services, software development (including activity dedicated towards the creative industries) and Cloud Computing and Data Warehousing are all excellent

	opportunities for the Island.
1	Globalisation - software development Something that further leverages tax position - procurement of software for example.
1	Commercial exploitation of digital assets on a global scale. Digital integration of geographically separate businesses and sectors, including offshore finance.
1	Hosting and geodiverse disaster recovery, testing and market research, with a focus on targeted social groups.



Which of the following services does your organisation outsource to off-Island suppliers?

Value	Count	Percent %
Digital Marketing	14	21.5%
Web design, development and management	22	33.8%
IT and computer services	11	16.9%
Hosting	25	38.5%
Other (specify)	13	20%
None of these	20	30.8%

Statistics	
Total Responses	65

Open-Text Response Breakdown for "Other (specify)"	Count
All communications services	1
Billing system.	1
Contract legal services	1
Development Resource	1
Development of tools and plugins.	1
Digital Print	1
Low level software development	1
PR, Marketing	1
Printing	1
Software Development	1
Software development	1
asdf	1
software development - Malta	1

Digital Jersey has been operating since May, organising events on a monthly basis and facilitating conversations on LinkedIn and Twitter. What can we do better? What do you want to see in the upcoming

months?:What should we stop?

Count	Response
3	
1	.
1	...
1	?
1	As long as you enjoy it, keep doing it. Get people whom don't have something to sell talking ;-)
1	Don't know
1	Insular thinking
1	Just joined - don't know
3	N/A
1	News to me.
1	No comment
1	None
1	Not enough information to provide a proper reply to this question.
4	Nothing
1	Nowt
1	Relying on JT
1	Talks that are too sales based
1	The Bar
1	Thinking the States recognize ICT as a stand alone industry, we are NOT just fulfilment!
1	Too new too comment
1	Twitter
1	Using LinkedIn for event RSVPs. :-)
1	Wasting your time on social marketing...
1	keep doing what you're doing
1	n/a
1	nil
5	nothing
1	nothing - it's perfect
1	poor quality venue for sound / vision
1	taking your trousers down at each event - it's not big and it's not clever!
1	Closed user discussion boards such as LinkedIn and Twitter are often used as opportunities for naysayers and the vocal minority to speak their mind, this is often then misinterpreted as public opinion. more effort must be made to communicate the facts (absent emotion) to the wider community

Digital Jersey has been operating since May, organising events on a monthly basis and facilitating conversations on LinkedIn and Twitter. What can we do better? What do you want to see in the upcoming months?:What should we start?

Count	Response
2	
1	-
1	.
1	...
1	?
1	Better marketing of events
1	Broaden range of topics
1	Build a web site with profiles of local companies in this market

1	Developing an industry voice
1	Digital Jersey Awards
1	Don't know
1	E- newsletter with round up of events and news
1	Finding placements for Apprentice/Diploma ICT Students at innovative companies
1	Focus On Creating Challengers To Incumbents
1	Have one event as a debate on the above issues
1	How about some hands on workshops?
1	Importing speakers with wider experience
1	Include Guernsey and IOM
1	Just joined - don't know
1	Make yourself known.
1	More Networking Events
1	More formal discussions that we use Digital Jersey to communicate
1	More publicity. Not sure many people are aware of what you are trying to do
1	More technical sessions
2	N/A
1	No comment
1	None
1	Not enough information to provide a proper reply to this question.
1	Perhaps chair some debates with structure.
1	Producing policy developments that we feel need attention from the States
1	Taking Jersey into the 21st Century
1	Target subject expertise
1	Too new too comment
1	Website / Seminars / Overseas conferences and events
1	Widen the net, it seems small.
1	discussing the survey results as a group with a view to putting forward clear proposals
1	discussion.....
1	encourage more people
1	events
1	get more people involved
1	looking at emerging technologies especially mobile related
1	nil
1	not sure
1	promotion of IT to youth
1	providing lap dancers at each event
1	raised pr profile to wider audience
1	round tables, policy discussion, strategy discussion.
1	social events
1	what good developments are being done
1	A Digital Jersey website - far more professional and easy to use than managing LinkedIn and Twitter conversations
1	Lobbying for non government control, the government should regulate. Not write the business plan as they frankly are so behind creative thinking and entrenched in process.
1	expand their professional's membership to individuals working in Intellectual Property and Law etc.
1	Trying to involve business leaders or creating a business leader group. 10 minute start-up pitches, putting them on the map.
1	Develop an ICT growth in Jersey info pack to be used by all local vendors in attracting international customers.

Digital Jersey has been operating since May, organising events on a monthly basis and facilitating conversations on LinkedIn and Twitter. What can we do better? What do you want to see in the upcoming months?:What should we continue?

Count	Response
2	
1	...
1	?
1	AS YOU ARE
1	All
1	All of it
1	As you are
1	Continue as is
1	Continue what you are doing now
1	Don't know
1	Encourage debate and explore opportunities
1	Events
1	Expanding Communications On Aims
1	Go on with talks, etc.
1	Good Quality Dialog
1	I have no knowledge of this group.
1	I love Luke
1	Industry specific presentations
1	Informal meetings
1	Informal venues
1	International market, create demand.
1	Just joined - don't know
1	Monthly Events, newsletter
1	Monthly events - make them consistent
1	Monthly get togethers
1	Monthly seminars
2	N/A
1	No comment
1	Not enough information to provide a proper reply to this question.
1	Pretty good going so far!
1	Promoting ICT.
1	Providing a forum for comment and constructive criticism of a failing Government
1	Regular events, general feel
1	Social media
1	The talks
1	Too new too comment
1	What have you started?
1	Working closely with BCS Jersey, avoiding duplication of effort.
1	communicating
1	conversations and events
1	diversity of topics for discussion
1	events, comms
1	good professional talks
1	good/interesting speakers
1	monthly presentations
1	nil

1	providing free drinks - Thanks E-scape!
1	social media
1	stay enthusiastic - well done!
1	tweets/linkedin info sharing
1	I think Digital Jersey should continue to look to develop its agenda and begin to work with other areas in this field to raise the profile of the whole sector and the opportunities that it presents.
1	Developing more cloud service products in the industry by working with new cloud businesses to generate income into the Island
1	Continue with everything that you're doing ... the regular events generate discussion and it's great to get the ICT community together.

Additional comments field:

Count	Response
1	-
1	.
1	Are regulatory frameworks necessary? The least regulation in place, the better.
1	Coffee
1	None
1	Not had the opportunity to attend a DJ event yet so unable to comment on Q37
1	Raise the bar. let's think about what needs be doing, not about what it's currently being done
1	Too Few Tier 3 Data Centres With Little Scope For Tier 4
1	Too new too comment
1	nil
1	There have been a few attempts at incorporating a professional body to represent the industry and give a coherent public message - a 'digital chamber of commerce'. Should this be revisited?
1	Have left some questions blank because answers did not fit the radion buttons. Happy to discuss. DJ doing v well. Would still argue that formal events can safely be less frequent than monthly, but a monthly social to fill the gaps would be good. This survey is an excellent initiative. Vital thing is to keep it light and positive and avoid the mistakes of Creative Jersey which got bogged down in negativity and bureaucracy from day one.
1	In terms of the survey, I am slightly uncomfortable on dealing with the 'yes/no' questions so will elaborate on my replies. Q 19. I am not sure the Govt should be providing grants in the form of 'picking winners' what it should do is support companies who want to grow by encouraging Venture Capital and potential 'co-investment'. Q 24. The Govt should look to assist to develop business locally in the first instance but there has to be a strategy to develop external opportunities as well.
1	Some of the questions provided only Yes/No options, where the answers are almost certainly "It depends" or at least "Don't know"
1	suggest enabling cpd certificates / validation for some the talks - given the quality of the last one as an example it would seem appropriate to do so
1	After a day out, Julie is at the bus stop in St Brelades Bay and needs to get back to St Helier. Using her smart phone that contains a tiny NFC wireless communications chip, she places her handset on a tag on the Smart Poster-enabled timetable and is automatically informed that her bus will arrive in 20 minutes by a message that pops up on her phone screen. Now fully informed of the expected arrival time of the bus, Julie wanders over to the nearby cafe and buys a Jersey Ice cream paying for it by swiping her Smart Phone over the contactless payment terminal at the counter. Julie's bus arrives and she buys her ticket by swiping her phone over the NFC Reader which automatically deducts the ticket price from the electronic wallet stored on her Nexus S NFC Smart Phone. Although this scenario sounds like science fiction, a similar Near Field Communication initiative is already being tested at 10 bus stops on the mainland in the borough of Poole. John is taking his new BMW out for a spin, so he places his NFC Smart phone next to the car door which automatically identifies him as the car owner using NFC wireless communications before unlocking. He drives down to Beaumont to visit his mum who lives in sheltered housing and on arrival he swipes his Smart Phone at the gate to gain entry. The encrypted identification details stored on John's phone are checked by the security system and once verified the gate is automatically unlocked allowing him to gain access. John's mum has a medical condition that requires regular monitoring by medical staff so he passes his NFC enabled smart phone over her wrist bracelet to collect important information about her condition. The details are collected wirelessly by the smart phone and then sent

by text to the doctor's surgery for analysis. Near Field Communication is already being used by healthcare professionals in Haiti to monitor contamination of water supplies, by doctors in Austria to remotely monitor patients' blood pressure, and next month an NFC product will be introduced to monitor potential sleep disorders remotely negating the current need for patients to spend days or weeks in specialist units away from home. The Duvalier family have sailed over from St Malo and spot the Tourist information Smart Poster on the Elizabeth Quay. Claudette Duvalier taps her Smart Phone on the Durell Tag and she collects information on opening times, Alain Duvalier uses his phone to tap on the tag that gives him information about the time of High and Low tides whilst Lysette Duvalier uses her NFC Smart phone to access information about the Jersey Live Festival. All the information supplied by the Smart Poster is automatically stored on the Duvalier family phones ready for them to use at any time. The French have been earlier adopters of Near Field communication and have positioned NFC Smart Posters throughout the city of Nice. These Tourist information Smart Posters relay information directly to Smart Phones using simple Tap Your Phone™ Technology to help visitors find out useful information such as opening times, prices and also discount vouchers redeemable at various venues throughout the city. NFC enabled devices are already in use across a number of European cities as a way of disseminating up-to-date information to tourists quickly and easily without many of the costs traditionally associated with printed brochures and leaflets. Lucy is at home in St Clement, she has recently been sent a mini adhesive NFC Smart Poster by her local supermarket which contains a tiny NFC microchip. When she places her Samsung Galaxy 11 Smart phone close to the tag and she gets immediate access to the deal of the day. Using Tap your Phone™ Technology Lucy is able to complete her weekly shop online from her mobile phone and pay for the goods using the credit card details which are encrypted onto her handset. The payment is authorised and processed immediately by her bank saving her the time and effort usually associated with a weekly shopping trip to the supermarket. Jeff is wandering through St Helier and fancies a skinny latte and a pain au chocolate at a nearby coffee shop. Inside the shop he taps his phone on the Skinny Latte tag and then on the Pain au Chocolate Tag on a Smart Poster which doubles as the store menu, automatically registering his order for the barista to complete. The App on his phone automatically pays for the drink and croissant, deducting the appropriate amount from his electronic wallet that is stored on his handset. Jeff can top up his electronic wallet when he gets home, via PayPal or his online banking account by simply transferring an amount of his choice. Jackie is in the Zuma fashion store where she has seen a pretty little red dress she likes. She passes her phone over the tag which sends information about the price and the fabric directly to her phone's screen. She tries the dress on which fits perfectly and when she goes to the checkout she passes her phone over the NFC reader that deducts the payment from her credit card, which is encrypted and stored on her NFC Smart Phone. On the way back to her car she notices a Smart Poster for a gig the following week at Fort Regent. As the smart poster allows her to buy the tickets from her smart phone app she places her Nexus S close to the tag on the poster where the payment is authorised immediately and electronic copies of the ticket are sent to her phone. Not only does the smart poster allow Jackie to buy the tickets immediately, she can also send on her friend's ticket to their smart phones. Congratulating herself on this time saving benefit, Jackie reaches her car and remembers how she used to have to leave Pay Cards on her car for the length of time she might spend in the car park. Now when she leaves the car park she places her Smart Phone next to the reader at the exit and it deducts the exact cost of parking from her electronic wallet saving her some extra cash as she no longer has to over-estimate her stay. When she entered the car park earlier in the day, the same NFC reader was able to give information about the cost of parking, how many parking spaces were free and on what floor they were. The cost saving and time saving have been beneficial, but Jackie also gets a loyalty bonus delivered directly to her electronic wallet which she can use as credit towards future visits. Arriving at the gym to attend his circuit training class Jason passes his phone over the tag on the NFC Smart Poster automatically paying for his class and downloading the timetable of his future classes into his phone's calendar. At the end of the class he is thirsty so he passes his Smart Phone by a tag of a nearby vending machine, out comes a can of Red Bull and the payment is automatically sent to the vending company. Another machine dispenses his copy of the Jersey Evening Post and payment is again extracted automatically from Jason's phone. On the way to meet his friends for dinner at a local restaurant, Jason notices a Smart Poster advertising the restaurant and passes his phone over the tag which reads 'Today's Special'. The offer for today is for either a free glass of wine or a free dessert for every diner in his party. The Smart Poster also allows Jason to browse the rest of the menu, check opening times and provides the facility to book a table all from his mobile phone. Jason thinks to himself how clever these posters are and how much easier it is to access information, pay for items and how much time and money it saves him. The free dessert for each of his friends is sure to keep him popular too! After a lovely meal Jason takes a stroll through St Helier and stops at the window of a local estate agent. He has been looking for a new flat and sees a suitable property in the window. He passes his phone by the window and the property details are transferred to his Smart Phone screen, with another tap on his phone he requests an appointment to view which is automatically saved to his calendar and that of the estate agents, along with his contact details. The above examples provide just a few scenarios where NFC Technology has the potential to save customers time and money when making payments for small items or retrieving accurate information about products and services. Google have today announced a partnership to with MasterCard and Citigroup to rollout an NFC payment system using the search giant's Android smart phone handsets. Citigroup debit and credit card holders will be able to download an app to their phones which will allow them to pay for goods and services without reaching into their wallets to retrieve a plastic payment card. Users of the app will also receive targeted advertisements for goods and services, whilst also being able to manage their account directly from their phones. Google are also expected to be big winners, selling on demographic and purchasing data to other retailers based on the information they gather as part of the NFC payment process. Interest in wireless mobile

payments is also increasing here in the UK, with Sir Stuart Rose, former Chief Executive Officer at Marks and Spencer, being invited to join the board of the Money Mobile Network (MMN). Rose's appointment to the board seeks to unify the partnership of The Carphone Warehouse founder, Charles Dunstone, Monitise and Best Buy Europe to provide mobile shopping, banking and marketing services across the British Isles called "Simply Tap". Consumers will be able to see a product in store, enter a code into their mobile phone and have the item paid for and delivered to their home address automatically. 17 of the top 20 UK retailers are already in talks with MMN about rolling out the service; with 750 million mobile subscribers in Europe alone, large companies are taking mobile payments very seriously. On a more local level, during trials, retailers using NFC technology have reported that they can boast a more loyal customer base who appreciates the ability to pay for an item quickly and simply. Value added functionality such as loyalty schemes built into smart phone apps and the ability to offer discounts directly to a mobile phone handset via smart posters have also been recognised as a great way of improving customer retention. A six month long trial in the Spanish town of Sitges demonstrated each of the above findings, but most importantly for a local economy, that NFC payment users made 30% more transactions than customers paying with cash or credit cards, and that the average purchase value increased by 23%. And the London Underground Oyster card system has demonstrated the ongoing success of using NFC for ticketing and payment systems. The logical extensions of such systems are smart posters that can dispense tourist information such as the Nice town tour in France. Tourists are able to access time and location specific information on the city of Nice simply by passing their NFC enabled smart phone next to an NFC Smart Poster. By following the trail of posters, tourists are able to access relevant multimedia information as they view the sights, whilst the smart posters will also dispense relevant information such as nearby accommodation, shops, restaurants and events, helping to encourage the visitor to spend more in the local economy, by providing relevant targeted information. The use of smart phone apps is almost limitless when combined with NFC technology. Plastic payment cards or loyalty schemes will no longer be required as the information can now be securely encoded onto a customer's smart phone. Research shows that people are less likely to forget their mobile phone when leaving the house than they are their wallets; by providing customers an easy way to always have their wallet, in the form of a contactless payment system, businesses are sure to benefit. Businesses should also expect reduced start-up costs when implementing new loyalty schemes or special offers, because the deployment of smart posters and apps is centralised. Printing brochures and leaflets will become a thing of the past as the information powering a smart poster can be updated remotely without replacing the whole poster. Since October 2008, over 200 trials of NFC Technology have taken place with a view to testing the business importance and relevance of the concept. Paul Lakeman of local business Near Field Communication says this; "Jersey's size and the close proximity of everything makes it the ideal location to trial and test Near Field Communication a Technology that will undoubtedly affect all our lives and this could position Jersey as an innovative location to test NFC technologies. The implications of how Near Field Communication could benefit Jersey's economy are plain to see. Large financial institutions are investing heavily in contactless payments, MasterCard have been testing PayPass and Visa has PayWave and systems like these will need extensive backend support and stringent financial regulation. The ramifications for tourist organisations are also very evident and on Island and off Island initiatives should be tested." As Rich Pleeth said in his recent article on (NFC) Near Field Communication for "Think Quarterly" from Google, "We are at the cusp of a new era of consumer relationships. The time to act is now; otherwise you'll be touching into the train after it's already left the station."

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| 1 | Telecoms, which I feel I understand will thrive in the right environment. It is a requirement that there is large capex for this but government is not the right body to do this. Unfortunately neither is the ex, government owned incumbent. Their is too much emphasis on profit and the telco has this pressure. To create the right environment, profit may have to suffer. |
| 1 | Question 24 about growing local businesses ... of course, yes, I'd like to see local businesses growing but there's a quality issue that we need to address first. Many of the local IT professionals have never worked outside of the island and this is often very obvious in the way that they work. For example, it's 2011 and we're having discussions about the benefits of adopting agile techniques whereas most of the people/organisations I'm engaged with across the world are talking about how to *optimise* agile processes and the delivery of IT services. Take a look at things like "devops", "continuous delivery" and Lean/Kanban for examples. Indeed, many of the organisations *I* work with are already expert in what they do (i.e. build software for their customers), but they are always looking for continuous improvement. At the moment there's very little incentive for local businesses to improve the way that they do business and, from a software development perspective, late/over budget/poor quality delivery is seen as the norm. Perhaps attracting a small number of non-local businesses will provide the incentive that the local organisations need to start being world-class. Whether they admit it in public or not, I personally know a number of local IT directors that feel the same about the lack of local quality. I'm certainly happy to talk about this further as it's a major stumbling block for the growth of the local industry IMHO. Government involvement will be useful, but I think we have some issues to resolve first. |
| 1 | Disadvantages: Meeting in a pub without proper testing the environment (sound related problems) led to a couple of restrictions. Advantages Meeting in a Pub was nice to "break the Ice" and give a different "mindset" to the participants. |
| 1 | INcreasing the resource pool of high ICT specialists will reduce the price locally but grow the ability to export the resources. If we look locally we will always be a tertiary industry. A few will be very rich but the industry will not grow into a 'Sector' until it exports. |
| 1 | The prognosis is that nothing has been effectively moved forward since the JISC initiative in 2000. Sadly the world has and Jerseys very clear lead has been marginalised, with other jurisdictions taking leads. Jersey is now an e-business |

	also ran, the creative and innovation, often slowed by suppressive regulation, by a government that has not grasped the needs of international business or importantly understanding that facilitation is key to attracting new entrepreneurial venturers, private or corporate. Opportunities must be grasped and nurtured, not over regulated.
1	I support Digital Jersey survey and it should provide some good feedback, however, I think some paid research should be carried out, interviewing industry experts in competitive jurisdictions and internal interviews of local ICT and related industry professionals. There should also be some secondary research done by the likes of London Business School, Gartner and Deloittes. JT and States of Jersey need to publish their financials and business plan for the implementation of an island wide fibre optics network so it is open to scrutiny and feedback. In my view there needs to be an open and comprehensive ICT strategy and as I've said before this needs to include Education strategies, Telecommunication strategies, Legal frameworks, eGovernment, policy guidance etc., this could be delivered as part of a public private partnership with Government and representative body much like Jersey Finance is for the Finance sector. Jersey needs to develop clear goals and execute them based on tangible action plans.
1	The IT industry's focus at present is to support the Finance industry. This probably won't change over the next five to ten years.
1	introduce excellent IT education in schools. The standard of IT being taught is either appalling, or all good IT students promptly leave the island/choose a different career. Inspired, clever, rounded individuals is what we need. If schools continue to focus on ECDL type qualifications then we will turn out the same poor standards.
1	One major thing I would like the government to do is to create a level playing field. At the moment a Jersey based business could safely host its data in Zurich but a Swiss, or Luxembourg or German business could not, legally, host its data here. In principle I oppose trade barriers but if others have those rules then we should do the same.
1	This survey needs to be more outward focussed or you need a separate one to send to Multi Nationals as a survey to identify what would make Jersey attractive to them. Obviously we are all going to say yes to tax breaks and support - we need it!
1	I have been directly involved in the IT industry for 30 years as a Director and shareholder of significant IT Companies. Very regretfully Jersey lacks any form of common strategy or vision outside of supporting the Finance Industry. This is witnessed by the recent debacles surrounding the Technology Sectors - I have a report written 2 years ago to EDD which identified all of the growth areas, and how they could be addressed. It was as usual ignored, as 'IT Strategy' was the role of SOJ ISD - very sad There should be an ITC Strategy steering group - across industry and service providers to develop a deliverable Technology strategy which provides the services that will benefit, Government, Industry, and Citizen alike. At present the availability of services delivered can be exceeded in the Third World. and Government / Citizen on-line services which must be in the lower quartile in the UK, irrespective of the vast amount of money spent over the last two years. It must be changed
1	Any regulatory framework should address data security and jurisdiction to ensure that businesses in Jersey relocate their data and IT staff to other jurisdictions such as Switzerland on data security grounds. This is one of the key drivers for whether ICT organisations in Jersey remain first choice for local business. Also, there are less opportunities for junior people to get jobs in ICT and develop as talent to move into consultancy whilst local firms reduce headcount in their IT departments and in-source entry level roles to lower cost suppliers like Indian organisations.
1	Government should have a strategy and have done a SWOT analysis before anything was announced. A business would not operate in this way. You need a business plan before getting funding from a bank. So the Govt should have this before public money is spent.
1	JT needs to split into wholesale infrastructure and retail divisions and stop competing against private companies using cross-subsidisation. Accounts should be open to scrutiny. If they are to remain responsible for the wholesale network they need to start listening to the industry rather than guessing what we need.



Digital Jersey

Thanks to

All respondents
and
Luke Szkudlarek
Kirsten Morel
Ian Ronayne
E-scape

Report available on - www.digital.je