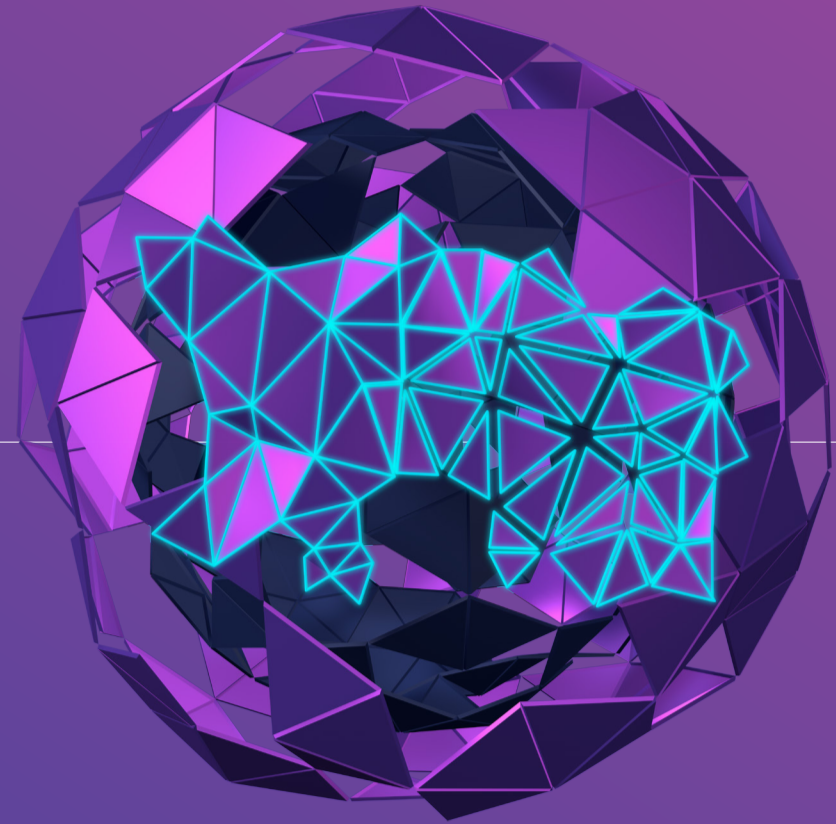




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# Digital Skills Strategy 2023 - 2028



University  
of Exeter

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## 1. INTRODUCTION

This report is the summary of the key findings set out in the August 2022 Digital Skills Strategy refresh document presented to Digital Jersey.

An original five-year strategy was produced by the Marchmont Employment and Skills Observatory at the University of Exeter, in 2017.

Since 2017, great strides have been taken by Digital Jersey in implementing a new digital educational offer and in establishing the Digital Jersey Academy (Centre of Excellence). Furthermore, the global pandemic has impacted on the Digital Skills world, driving adoption of digital approaches, and highlighting the need for a digitally literate workforce.

Although many companies adopted digital technologies in some form or other decades ago, only in recent years has digital transformation become a critical component of organisational health. Over the past two years, organisations have faced increasing pressure to embrace digital technologies and meet evolving consumer expectations and this trend will only persist in the coming years. As data becomes embedded in every decision, interaction, and process, managing data effectively and having the skills in-house (and on island) to do this will be crucial.

Linked to digitalisation and (to a lesser extent) the pandemic, Digital Jersey have seen both policymakers and employers looking to them for

leadership and guidance on the development of new and/or modified products and courses that can meet the needs of Jersey's employers and residents. Indeed, Digital Jersey were able to play a very considerable role in the Island's response to the pandemic and provided many learning opportunities (and continue to do so).

In this context, Digital Jersey felt it was time to assess the lessons learned in delivering digital skills to Jersey and to refresh the strategy for 2023-2028. The study involved consultations with key employers, policymakers and stakeholders on Jersey and consultations with digital sector experts in the UK; collation and review of literature and data; and assessment with Digital Jersey of where there have been successes, where other approaches may have been more fruitful and what the key lessons for the future are.

The pace of change in the digital world is constantly increasing. Since 2017 Digital Jersey has played a crucial role in driving forward Jersey's digital developments and keeping it abreast of the latest advances. Implementing the recommendations below will enable Digital Jersey to further its mission by ensuring employers, educators and the wider community are ready for future digital innovations.

## OVERVIEW OF RECOMMENDATIONS

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01. Restart the Digital Skills Partnership (DSP) and enhance the role of Digital Jersey.

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02. Develop the Digital Jersey Academy to broaden impact and focus on workplace skills.

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03. Maximise the use of Labour Market Insights to understand industry's evolving needs.

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04. Develop a Skills Escalator to increase the uptake of digital career choices.

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05. Drive the promotion of, and engagement with, digital skills amongst employers, focusing on: students, educators, parents/guardians, Jersey nationals living abroad and C-Level executives.

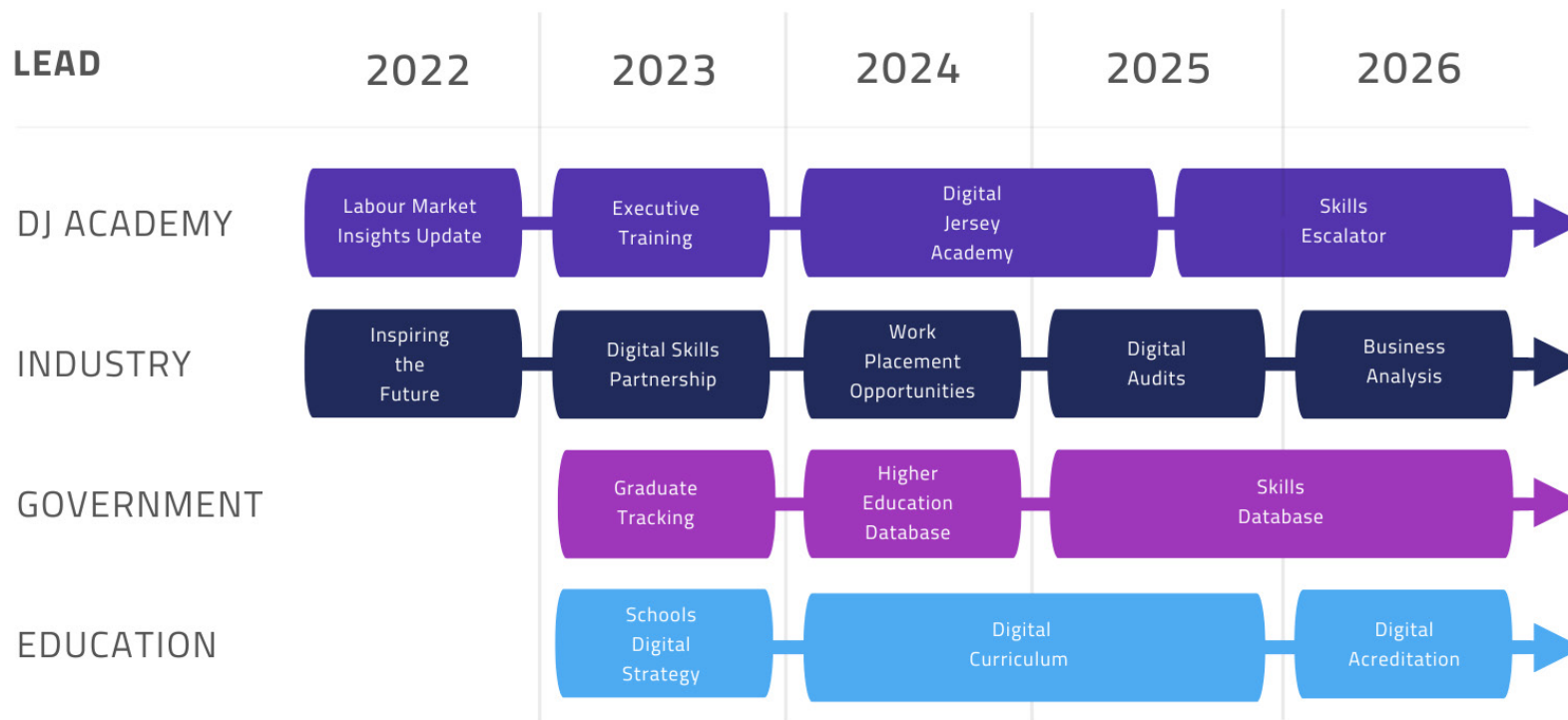
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06. Develop training opportunities for all types of business, embedding essential skills across the workforce in Jersey.

The details of these recommendations are set out on page 15-17

## INDICATIVE TIMELINE

Below is an indicative timeline that demonstrates how this strategy could evolve and how it is dependent on multi-agency engagement. Some projects have already started, for example, the refresh of the Labour Market Insights and Skills Jersey has launched the 'Inspiring the Future' website to allow greater industry engagements with schools. Such interdependencies increase the risk of not being able to deliver outcomes successfully but are vital to make substantial and long-lasting change.



## 2. METHODOLOGY

It was agreed that the work required to refresh and develop the five-year strategy would incorporate the following activities:

- Reviewing what has gone well and what has not gone so well since the previous strategy
- Identifying what skills Jersey employers are short of and what they want to see developed
- Understand the views and plans of the Education sector and their thoughts on how Digital Jersey's work can best fit with them

To develop the strategy and identify the appropriate recommendations, the study involved:

- Consultations with employers, policymakers and stakeholders based in Jersey
- Consultations with digital sector experts in the UK
- Collation and review of available literature and data
- Assessment with Digital Jersey of where they have achieved successes, where other approaches may have been more fruitful and what the key lessons for the future are

The refreshed recommendations were then developed by the study team in close consultation with the Digital Jersey team.



### 3. THE ECONOMIC, EMPLOYMENT AND EDUCATIONAL SETTING IN JERSEY

Jersey is largely a serviced based economy, which is dominated by the financial services sector. In December 2021, there were a total of 62,260 jobs on the island, made up of 54,370 jobs in the private sector and 8,790 in the public sector<sup>1</sup>. There were 8,400 private sector firms, of which 660 were engaged in financial services plus a further 1,704 in miscellaneous business services.

The financial and legal services sector accounts for the largest share of employment (22%), a figure unchanged since the previous strategy. The other important sectors in terms of employment: the public sector (14%), education, health and other services (14%) and wholesale and retail (12%). Together with miscellaneous business services (10%) and information and communication (3%), the combined service sectors account for three quarters of all jobs on the island.

Following a substantial fall of c.16% in real terms from c.£55,000 in 2007, the average economic standard of living in Jersey - measured by GVA per head of population - has stabilised over the last few years at around £46,000. The fall was driven by the downturn in the finance sector, though the average is still considerably higher than that in the rest of the UK (£32,800). Continuing the same trend, productivity - the amount of output generated per labour input - has also fallen, by 8%, in real terms over the last year. Figure 2 shows the GVA added for each sector, with financial services accounting for almost two-fifths (38.7%) of total GVA in 2020.

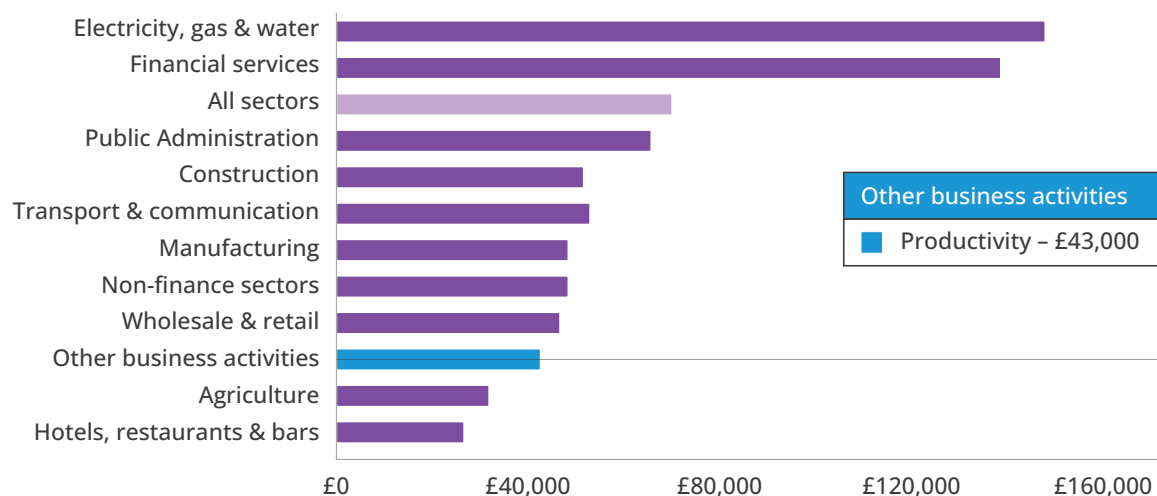


Figure 3: GVA added per full-time equivalent employee (At constant 2020 values - Source: Statistics Jersey<sup>2</sup>)

More detailed analysis of GVA by the key financial services sector shows that for the most recent year in which data was available (2018):

- Jersey's finance sector, as measured by total GVA, increased by 2% in real terms in 2018
- The Banking, Fund management and Trust and company administration sub-sectors saw real-term increases in GVA
- In real terms, total GVA in 2018 was £730 million below the previous peak recorded in 2007
- Total GVA of Jersey's finance sector in 2018 was £1,843 million

Examining the overall productivity data for the island in a little more detail, Statistics Jersey note that in 2020 productivity, measured by GVA per full-time equivalent (FTE) worker, decreased by 8% in real terms:

- The finance sector saw productivity decrease by 9% in real terms
- The non-finance sectors, overall, saw productivity decrease by 7% in real terms

**Digital skills are, of course, a key driver of productivity.**

<sup>1</sup> <https://www.gov.je/Government/JerseyInFigures/EmploymentEarnings/Pages/LabourMarket.aspx>

<sup>2</sup> <https://www.gov.je/Government/JerseyInFigures/BusinessEconomy/Pages/NationalAccounts.aspx#anchor-4>

#### 4. EMPLOYMENT AND SKILLS

“Digital skills are becoming a larger part of every sector, the automation of tasks currently undertaken by people is increasing, and Jersey when compared to London or Edinburgh is approx. 6% less digital across all sectors. This 6% gap equates to potential lost productivity and lower GVA per employee.’

*Working Future*<sup>3</sup>: the source of labour market and skills projections for the UK 2017-2027 presents future prospects by sector, focuses on demand for skills as measured by employment in terms of occupation and qualification. It shows that while the overall size of the labour market (in terms of number of employees) will grow, sectoral change will be one of the key drivers of changing demand for skills over this period. It highlights the following trends which are of particular note to Jersey:

- The service sector will account for most of the increase in employment levels, focussed in business and other services
- There will also be growth in public administration, health and education, principally driven by increased demand for health services as the population continues to age
- A continued decline in employment in sectors such as manufacturing and construction (mainly due to labour shortages)

There will be a sustained shift towards knowledge-based employment in higher skilled occupations.

The Digital Jersey Labour Market Insight (2021)<sup>4</sup> report demonstrates how this trend is already impacting on the island: “...we found widespread adoption or planned adoption of technology and a growing demand for data and analytics skills across many industries.” The report states: “...across all employment in Jersey 10.4% of skills recruited for are digital. The Information & Communication sector has the highest proportion of digital skills required at 52.1%.” Of particular concern, in terms of productivity and future skills and employment trends on Jersey, the report concludes:

“Digital skills are becoming a larger part of every sector, the automation of tasks currently undertaken by people is increasing, and Jersey when compared to London or Edinburgh is approx. 6% less digital across all sectors. This 6% gap equates to potential lost productivity and lower GVA per employee.”

The report goes on to encourage all sectors to adopt (digital) automation as soon as possible.

Employment in Jersey is currently at an all-time high, with the total of 62,260 jobs in the economy in December 2021 being 2,240 higher than in December 2020. This growth in employment has been driven by the private and public sectors, with notable increases in:

- Hotels, restaurants and bars (610 more jobs on an annual basis)
- Private education, health and other services (450 jobs)
- Financial & legal activities plus miscellaneous business activities (380 jobs)
- Wholesale and retail (330 jobs)

Although the overall growth in employment is encouraging, the spread between sectors continues a trend of (proportionately) more jobs being created in lower GVA sectors, such as hotels and restaurants, compared with employment in high value financial services.

<sup>3</sup> [https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment\\_data/file/863506/Working\\_Futures\\_Main\\_Report.pdf](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/863506/Working_Futures_Main_Report.pdf)

<sup>4</sup> <https://www.digital.je/our-work/labour-market-insights/>



To maintain or improve overall productivity levels across sectors, the workforce will need to become increasingly tech-savvy. The cost of not digitally upskilling is highlighted in PWC's report: "Upskilling the Channel Islands' workforce for a digital world<sup>5</sup>". The key findings are:

#### JOBS AT RISK OF AUTOMATION

30%

OF JOBS ARE POTENTIALLY AT RISK FROM AUTOMATION IN THE CHANNEL ISLANDS BETWEEN NOW AND 2035

#### COST OF UPSKILLING NOW OR LATER

6 times

THE COST OF DOING NOTHING WILL ULTIMATELY BE 6 TIMES HIGHER THAN THE COST OF UPSKILLING NOW

#### MOST DISRUPTED SECTOR

27,000

JOBS AT RISK, WITH FINANCIAL SERVICES BEING THE SECTOR MOST DISRUPTED.

The Digital Jersey Labour Market Insights report also identifies specific skills challenges being faced by local employers. These include difficulties in finding suitably skilled people from within the local labour force - particularly in the digital sector - which has clear implications for the growth and development of the island's economy as whole:

**Digital Lagger:** Jersey's digital density (adoption of technology) is 10.4% - significantly lower than the counterpart figure for London where adoption is over 16%. This gap represents lost productivity.

**Digital Employment:** Digital jobs are pivotal to all sectors and growing as a share of all recruitment. 44% of advertised digital roles are by digital companies, whilst financial services represent 29%.

**Jobs Automation:** Many of the island's highest remunerated jobs are most exposed to the impact of automation. Locally, 55% of Fund Accountants tasks could be automated. Since the release of the PwC report in 2020, we note that the adoption of automation has been slower than expected however the risk of job automation remains.

**Workforce Upskilling:** Widespread reskilling will be needed to support those impacted by technology disruption.

**Tech Potential:** While process automation has been embraced by the banking sector, other sectors significantly lag. Sectors with the greatest opportunities for digital adoption include healthcare, education, legal services, and hospitality.

Alongside those in employment, there are other people on the island who are actively seeking employment. This figure has fallen steadily since the previous strategy (aside from during the pandemic), with the current registered number being 720 non-seasonally adjusted.

This represents a substantial fall of c.40% since 2017 when the figure was 1,180.

#### 5. EDUCATION AND DIGITAL QUALIFICATIONS IN JERSEY

While the number of pupils in schools in Jersey has remained at c.14,000<sup>6</sup>: 78.6% of pupils achieving standard GCSE passes (4/C+) in English and Mathematics in 2020/21, compared with 66.6% in 2016/17 and 67.1% in the UK as a whole in 2020/21. Similarly, the average points score per A level entry has improved from 35.0 in 2016/17 to 41.3 in 2020/21.

The available evidence indicates that, while some education providers have been able to increase their digital provision for children and young people during this period of time, overall (and in line with the rest of the UK) there has been a decline in the numbers taking digital (or related) qualifications. There are however, some examples, like at Highlands College, where there have been great improvements in the breadth of courses related to digital and IT that are available together with improvements in the grades achieved by young people. A total of 125 learners were on nine different courses in 2021, compared with 75 on the four available courses in 2017.

Nonetheless, across the island and at school level as a whole, several stakeholders noted that the numbers of pupils taking digital/IT courses have declined. It is also important to reference to the work of Digital Jersey in helping to redesign the curriculum to ensure that digital is at the heart of education going forwards.

<sup>5</sup> <https://www.pwc.com/jg/en/assets/document/digitally-upskilling-the-channel-islands.pdf>

<sup>6</sup> <https://www.gov.je/Government/JerseyInFigures/Education/Pages/Education.aspx>

## 6. FINDINGS FROM CONSULTATIONS AND RESEARCH

This chapter presents the main findings of the primary and secondary research stages of the study, covering the consultations with employers, partners and stakeholders (one-to-one discussions and focus groups), the review of Jersey literature and documents together with analysis of the available data collated for the island. The findings are presented under the following sub-headings, though it should be noted that some are cross-cutting and appear under several headings:

- What has gone well and what needs reviewing
- What skills do Jersey employers need and what do they want to see developed
- Education sector thoughts and future plans and how Digital Jersey fits with them

To preface the chapter, it is worth restating the core recommendations in Digital Jersey's previous Digital Skills Strategy 2018-2023<sup>7</sup>, which covered five main aims for Digital Jersey:

### DIGITAL SKILLS PARTNERSHIP

The DSP is designed to bring together industry and education, to make our island's workforce future proof, providing clarity on employer needs and guidance to curricula design. The partnership will work together with Skills Jersey, the island's central link between industry and education.

### DIGITAL JERSEY ACADEMY

- A specialist and recognised campus for digital skills
- Changing the face of post-secondary education in Jersey
- Delivering industry led training
- A collaborative partnership between industry and Skills Jersey to give leadership and direction to digital education and training
- Develop an education foundation

### LABOUR MARKET INSIGHTS

- Continually monitoring the workforce skills profile and pipeline of skills from compulsory education
- Working to understand industry's evolving skills needs
- Monitoring graduate retention from on and off-island

### SKILLS ESCALATOR

- Raise the profile of on-island training pathways to a career in digital tech
- Targeted intervention to create post-secondary training with all providers
- Give oversight, quality assurance and accreditation to skills initiatives
- Overseen by the Digital Skills Partnership, led by Digital Jersey

### INDUSTRY PROMOTION & ENGAGEMENT

- Student: Working to increase the pool going from education into industry
- Educators: Bridging the gap between what students are taught and industry needs
- Parents/Guardians: Engage students' key influencers, such as parents/guardians to promote the digital sector as a credible and desirable career choice
- Jersey nationals living abroad: Creating greater connectivity between students studying relevant qualifications off-island and potential employers in Jersey

Each of these aims is discussed in the following sections alongside some additional areas that were raised by those consulted. Concluding comments about the overarching findings presented in this chapter together with a set of "refreshed" recommendations for the Digital Skill Strategy 2023-2028 for Digital Jersey at provided at the end of this report.

<sup>7</sup> <https://www.digital.je/our-work/digital-skills-strategy/>

## 6.1. DELIVERY AND OPERATION OF DIGITAL JERSEY

The feedback from the consultations was very positive about Digital Jersey's delivery and operation. It was felt that Digital Jersey had very successfully established itself and had become a key part of "Team Jersey".

The organisation had taken the island forward in beginning to meet the challenges of digitalisation and automation, as well as in supporting economic growth and raising the profile of Jersey. Digital Jersey's role on the Digital Skills Partnership was seen as being an integral component of this development.

### DIGITAL JERSEY ACADEMY

There was widespread praise for the Digital Jersey Academy, which was now delivering much needed digital training. Specific areas that were identified as having been very successfully delivered were:

- Coverage of multi-disciplinary areas
- Long and short digital course provision
- Brokerage
- Length and content of the degree programme

Digital Jersey's work during the pandemic on helping to address digital exclusion was particularly highly praised and, in combination with the enthusiasm of several key stakeholders, this indicates a clear pathway for Digital Jersey to take a more active role in this agenda in future activities.

Linking training provision to employers' digital needs was identified as a vital area of future action for Digital Jersey. Playing the role of thought leader for the education sector in identifying the latest digital developments and how

they would drive employer's needs was similarly seen as essential.

In terms of delivery and operation in relation to the aims of the original 2017 Strategy, the refresh work identified the following key growth areas:

### DIGITAL SKILLS PARTNERSHIP

Overall, there was praise for the work of the DSP and Digital Jersey's role on it. However, there was concern among many of those consulted that it had ended and a belief that it needed to be restarted, albeit with a slightly different focus and set-up. Worries were expressed that "digital could slip down the agenda" – particularly as the Jersey Employment Group (JEG) has a broader remit.

### LABOUR MARKET INSIGHTS (LMI)

While it was acknowledged that there was now better LMI compared with 2017, frustration was expressed that it seemingly little use had been made of the findings to inform delivery, partnerships, or business engagement. Specific concern was raised about the need to "continually monitor workforce skills profile and pipeline of skills", as well as data on digital skills provision and student destinations.

### SKILLS ESCALATOR

Because of issues with achieving sufficient numbers of students in schools and in post-secondary level,

stakeholders and partners felt it was best to focus resources in the immediate future on raising the profile of a career in the digital sector and then in the slightly longer-term work with providers to increase provision of post-secondary digital sector training.

### INDUSTRY PROMOTION & ENGAGEMENT

The 2017 recommendations for promotion and engagement work covered students, educators, influencers, and Jersey nationals living abroad. The consultations indicated that a fifth group should be added: non tech-savvy employers who are not currently "up-to-speed", as it was felt that Digital Jersey have a key role to play in increasing awareness, knowledge, and demand for digital skills among them. Various suggestions for improving engagement with each group are included within the recommendations of our main report.

It was noted that the Digital Leadership Programme has struggled to achieve the number of students required to make it sustainable. While the content on the programme had been good, the timing of the programme with the pandemic and the subsequent impact on students studying longer courses, meant that focussing on shorter-term courses was likely to be more efficient going forward.

## 6.2 THE CHANGING PERCEPTION OF SKILLS IN JERSEY AND DIGITAL JERSEY'S ROLE

The original 2017 Strategy was able to identify a need for major digital skills innovations in a relatively quiet landscape, notably the Academy, the Digital Skills Partnership and the potential for skills escalators. In the intervening years this landscape has become a far busier and more active one - a feature it shares with 'skills' more generally. There has been a visible proliferation of activity relating to digital skills, trialling of new courses, digital innovation, employer-engagement and policy-support.

Skills is very much at the forefront of employer and policymaker thinking, and this is to be welcomed. Digital Jersey will not be able to drive the Island's response to the changes in the world of work on their own. But being engaged with the latest in digital and digital skills thinking and having the trust of those employers and policymakers on Island will enable them to respond flexibly to the inevitable sectoral changes and new jobs and opportunities that will emerge. Being an arms-length body also helps here, as Digital Jersey are not restricted by factors that seem to encumber other agencies which are embedded in government.

It is also important to note that Digital Jersey has recently produced a new five-year strategic plan<sup>8</sup>. The main aims and objectives (vision and mission) that it contains are:

**PURPOSE** Forging Jersey's digital industry and driving Jersey's digital society – Digital Jersey is the independent body representing and promoting the Digital Sector in the Island. Established in 2013 and funded by Government, Digital Jersey has been championing a digital first agenda by facilitating and connecting Industry and Government.

**OBJECTIVE 1** To support sustainable economic growth in Jersey's Digital Industry – as measured by sector contribution to GVA, job creation and the number and 'health' of digital businesses.

**OBJECTIVE 2** To establish Jersey as an internationally well-regarded 'digital centre' – as measured by ranking in the key indices, recognition in target media and online statistics, the results of industry surveys, and sector-specific inward investment.

**OBJECTIVE 3** To enable a connected, digital society and enhanced quality of life in Jersey – as measured by an increased provision of online services by Government, changes in the education curriculum, improved skills and awareness in the general population, and the development of essential 'digital' infrastructure.

These are referenced and considered during the discussion of the refreshed recommendations in this report.

<sup>8</sup> <https://www.digital.je/wp-content/uploads/2021/02/Digital-Jersey-5-Year-Strategy-2021.pdf>

### 6.3 HOW DIGITAL JERSEY CAN BEST IMPROVE THE DIGITAL SKILLS OF JERSEY EMPLOYERS

Jersey is well placed in terms of infrastructure to implement digital initiatives – indeed far better placed than the UK mainland – and this could underpin promotion to external partners and potential major stakeholders and those looking for a geographic testbed.

There is now a need to promote the importance of digital to all employers on the island and the view was that Digital Jersey needs to be at the forefront of the awareness raising work while also ensuring that the correct level of digital training was in place for each of the different employer groups. Focus should be placed especially on helping “non-tech” employers to fully articulate their digital needs.

*The Jersey Employers Group Strategic Workforce Plan (SWP) (2021)<sup>9</sup> lists the top ten skills that the main employing industries on the island will require in the future. Unsurprisingly, digital and associated soft skills dominate the list:*

- Digital (literacy/tech)
- Creativity and Innovation
- Agility and Flexibility
- Data (science/ analysis/ literacy/ security/ sharing)
- Resilience
- Change skills
- Leadership and Management
- Collaborative Skills (emotional intelligence/ partnership)
- Communication (internal/ external)
- Problem solving

The JEG is concerned that, while some sectors such as construction are proactively addressing these skills needs by developing their own Skills Strategies, other sectors are not acting as a “collective whole”, with businesses either acting on an ad hoc basis independently or not at all.

There was widespread acknowledgement that the Digital Jersey Academy had been successfully established and was now delivering much needed digital training. However, it was felt that this had been delivered principally for those who were already up-to-speed with technology and digital matters. These beneficiaries were felt to be mainly “advanced” digital users who were aware of their digital needs and that, consequently, much of the Academy’s provision was too advanced for other, less “tech-savvy” businesses.

There was now felt to be a need to promote the importance of digital to all other employers on the island and the view was that Digital Jersey needs to be at the forefront of awareness raising, while also ensuring that the correct level of digital training was available for different types of “non tech-savvy” employers. This was because many “non-tech” employers, due to their lack of digital knowledge, were unable to fully articulate their digital needs.

<sup>9</sup> <https://www.gov.je/SiteCollectionDocuments/Working%20in%20Jersey/JEGStrategicWorkforcePlanFinal.pdf>



Therefore, alongside its current work with tech-savvy businesses, Digital Jersey needs to identify more basic digital training for those who are not yet tech-savvy. This must include an emphasis on explaining the business imperatives (in terms of productivity, efficiency, profitability, etc) of getting up-to-speed digitally, together with a full explanation of the likely implications of failing to do so.

The employers consulted also raised the following further issues for consideration:

- Employers want skills that help them to **improve productivity, efficiency** etc; but there is a lack of awareness among many of what they can get from digitalisation and hence a lack of demand (“there is a lack of industry knowledge on where to access things”)
- Current demand is mainly from the **employers who “know” what skills that they need** and Digital Jersey is in a unique position to reach out to those who do not know what they need to guide and inform them
- Crucially, there needs to be a **digital pipeline** on the island as there is currently an insufficient supply of a range of digital skills and capabilities

Two significant suggestions were put forward for addressing several of these issues by various stakeholders and employers:

- **Digital Skills Fund** (for employers) - A major proposal was the creation of a fund for all employers, but with dispensation for SMEs, micros, sole traders, hybrid workers, etc. to pay for (re-)training and upskilling their workforces. It was suggested this could become the key component of upskilling the existing workforce if the fund was sufficiently resourced, including tax relief benefits. It was noted that the mechanism for allocation of any such fund (eligibility criteria) would need to be flexible and “not too tight” to ensure take-up.
- **Digital Lifelong Learning Wallet** (for individuals) - A similar suggestion to tackle the issue from a different perspective was the idea of an Island Lifelong Learning Wallet. This would put the onus on individuals rather than employers, enabling them to access digital learning (and possibly other types of learning) when it best suited them. This could be established in various ways including a check list allowing individuals to “draw” down their training requirements. It would also have the benefit of providing a visible re-training incentive offer.

The employers consulted during the study identified that the best means for Digital Jersey to improve their and other businesses’ digital skills were:

**Digital Jersey should lead in Digital Transformation and Innovation for Businesses** – Digital Jersey should demonstrate how digital can lead the way in business innovation, development, and change, possibly using the financial sector as a development model.

**Clarity on what Digital Jersey is responsible for** – Clarification is needed on the roles of Digital Jersey, Skills Jersey, the Trident programme, etc. A map of who delivers what would be useful, identifying Digital Jersey as the lead on transformation.

**Key Sector Digital Scenario Planning for Businesses** – An island level digital business case analysis for each key sector is needed addressing the strengths, weaknesses, opportunities, and threats for each sector in terms of digital skills needs.

**Digital Expert Placements with Key Island Businesses** – Digital Jersey could place or identify digital experts/champions/tech-savvy individuals within key businesses to work with them to identify their needs and how to address them.

**Digital Expert Placements with Board level intervention** – Digital Jersey could assign digital experts/tech savvy individuals to work with the boards of key businesses to explain the economic potential of digital (productivity, profitability, etc) and the implications of failing to upskill their workforce. Again, the finance sector could be used as a model.

The current digital training needs of businesses were identified in terms of three core target groups (the full list of needs for each group is given in the recommendations section):

- **Non tech-savvy businesses**
- **Financial sector businesses**
- **Hybrid working/start-ups/entrepreneurs**



## 6.4 HOW DIGITAL JERSEY CAN BEST WORK WITH THE EDUCATION SECTOR

The consultations found that Digital Jersey and Highlands (a key further education provider) have a strong relationship as evidenced by the Future Skills Alliance and two successful joint bids to government for education and re-training. Furthermore, both have a unified front on policy and employers.

Very positively, Digital Jersey and Highlands both want to develop relationships further and look for ways of creating new opportunities. Indeed, some areas were identified in which Digital Jersey can greatly increase its input:

- The first is to provide leadership to the education sector, identifying what digital skills will be needed and who will need it
- The second of these relates to continuing, while significantly enhancing, its role in assisting with the development of the digital curriculum on the island
- The third involves providing more detailed information, advice and guidance about digital careers to students and those that influence their attitudes towards it – thereby helping to drive uptake of digital related courses
- The fourth is to provide a bridge between the education sector and Jersey employers to identify exactly what digital training they need

In addition, it was apparent from various employers and partners that some means of funding the necessary digital (re-) training was required. Two main routes were identified (and are referenced earlier): either through an Digital Skills fund (accessible by employers with tax breaks) or an individual “learning wallet” for individuals to use throughout their lives.

The key points described below cover both the role of Digital Jersey and how its relationship with the Education sector can be best developed to mutual benefit.

**Provide Digital “thought leadership” role for the Education sector** – Digital Jersey should be in the thought leadership role for the sector, identifying and articulating the next steps in the digital revolution – defining Jersey’s new digital roles and what skills will be needed.

**Work with Government and Education Providers to develop digital curriculum** – Digital Jersey should work with Skills Jersey and CYPES (Children, Young People, Education and Skills) and Highlands (as well as other key education providers) to help to bring to fruition existing initiatives and identify new ones.

**Act as a conduit between employers and the Education sector** – Digital Jersey is in a unique position to bring employers and educators together in a constructive and cooperative manner for their mutual benefit, identifying employers’ needs and educators’ abilities.

**Creation of an Digital skills fund and/or lifelong learning wallet** – Reskilling the existing workforce is essential on an island with limited in-migration. This could be achieved by creating a dedicated adult skills fund or individual learning wallet to replace the reactive skills funding – with sufficient resources to make it successful.

**Creation of an on-island test centre** – There is a need for somewhere for people to be able to sit tests on the island – an accredited centre of some kind that is equipped correctly.

One further important issue was raised by stakeholders and partners from the Education sector concerning the autonomy and status of Digital Jersey. Several noted that greater independence or even full autonomy would be a good thing. However, there was little consensus on how this might be achieved, and it is beyond the remit of a Skills Strategy Refresh to explore the options fully. Consequently, the matter requires further consideration and discussion elsewhere.

## 7. CONCLUSIONS AND RECOMMENDATIONS

Jersey's economy enjoys comparatively high levels of GVA and low unemployment together with an educational system producing well qualified young people. However there is evidence, in terms of GVA and productivity initially, which will lead to the risk of increased unemployment in the longer term, that Jersey will need to digitally upskill substantial portions of the existing workforce in order for the economy not to suffer.

Furthermore without these changes, the numbers of young people leaving the education system with digital (or related) qualifications will not be sufficient to meet demand.

The overall feedback from the consultations was that Digital Jersey had very successfully established itself and become a key part of "Team Jersey". It had taken the island forward in beginning to meet the challenges of digitalisation and automation, as well as in a wider sense of supporting economic growth and raising the profile of Jersey. Digital Jersey's role on the Digital Skills Partnership was seen as being an integral component of this development.

Moreover, the partners, employers and stakeholders consulted were very positive about Digital Jersey's delivery and operation. There was widespread praise for the Digital Jersey Academy, which had overall been successfully established and was now delivering much needed digital training. Specific areas of provision from the Academy that were identified as having been very successful were:

- Coverage of multi-disciplinary areas
- Long and short digital course provision
- Brokerage
- Length and content of the degree programme (though note caveats below)

While suggestions were made for amendments to specific aspects of provision (see below), the consensus view was that the Academy had become a valuable asset to the island.

Linking the activities of training providers on the island to the digital needs of employers was identified by several of the consultees as a vital area of future action for Digital Jersey. Playing the role of thought leader for the education sector in informing them of the latest international digital developments and how they would drive local employer's skills needs was similarly seen as being essential.

Digital Jersey's work during the pandemic on helping to address digital exclusion was particularly highly praised and, in combination with the enthusiasm of several key stakeholders, this indicates a clear pathway for Digital Jersey to take a more active role in this agenda in future activities. Several target groups were identified for the promotional elements of this work (including young women, non tech-savvy businesses and the elderly), which could be delivered successfully in tandem with the aim of increasing the numbers of under-represented groups (such as women) in the digital workforce.

Given the multi-faceted nature of Digital Jersey's role and the diverse elements of its delivery, it was not surprising that the consultations produced a range of recommendations combining the refresh of *previous* recommendations, together with changes and/or additions to the *current* activities of the organisation, which are summarised below:

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## 01. Digital Skills Partnership and the role of Digital Jersey

- a) Restart the Digital Skills Partnership (DSP) (with Digital Jersey as lead) or as task and finish group on JEG
- b) Digital Jersey to be Jersey's lead on digital transformation and business innovation
- c) Digital Jersey to be the key link between employers and educators

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## 02. Digital Jersey Academy

Selected amendments to courses plus setting up:

- a) Digital Skills Fund, with tax relief benefits or individual Lifelong Learning Wallets
- b) Increased focus on hybrid working/self-employed/micro business

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## 03. Labour Markets Insights update & additions

- a) Annual audit of provision
- b) Annual survey of destination and returners
- c) Key Sector digital scenario planning
- d) Digital Audits

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## 04. Skills Escalator

- a) Annually update content of the Escalator to highlight where provision is missing
- b) Short term: continued raising of profile of digital careers (as below)
- c) Longer-term: working with UK universities and consideration of Higher Education digital courses in Jersey

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## 05. Promotion and engagement

Employers are not up to speed with digital needs and with urgent need to upskill – work at board/director level to promote digital awareness and skills needs (perhaps through leadership and business leader themed events and activities). Target:

**a) Students** (especially women and other under represented groups), by:

- i. Case studies
- ii. Employer visits
- iii. Work placements
- iv. Coaching and mentoring
- v. Brokering government digital work experience opportunities

**b) Educators**, by means of:

- i. Digital Jersey being “thought leaders” for education sector
- ii. Continued development of digital curriculum
- iii. Being a conduit between employers and educators
- iv. Helping to test or trial adult skills fund and learning wallet
- v. Identifying potential for an on-island test centre

**c) Parents/Guardians**, by means of:

- i. Promoting digital to those that have an influence on young people, such as parents/guardians
- ii. Working with parent groups and PTAs

**d. Jersey nationals living abroad**, by means of:

- i. Graduate tracking
- ii. Higher Education Database

**e. C-Level**, by means of:

- i. Thought leadership events and curated content
- ii. Executive Training for aspiring leaders and C-Level attendees

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## 06. Employers Skills needs to be addressed

Three main groups of employers to be assisted with **digital training** in the following areas:

**a. Non tech-savvy businesses** (core skills needs include):

- i. Leadership courses (leading to digital courses below...)
- ii. Digital Transformation courses
- iii. Digital Literacy
- iv. Essential digital skills
- v. Basic Data science/analysis
- vi. Data security/sharing

**b. Financial sector businesses** (key skills including):

- i. Productivity enhancements through digitalisation
- ii. Customer experience improvements using digital tools
- iii. Improving resilience and risk using digital systems
- iv. Crypto

**c. Start-ups/entrepreneurs/remote working**

(skills such as the following:)

- i. Essential skills: e.g. work setup, virtual meetings, work-life balance, remote collaboration, etc.
- ii. Next steps: e.g. digital marketing & social media, digital strategies & change management, workplace applications and processes, brand promotion, etc.
- iii. Advanced skills: e.g. programming, app development, AI, user experience design, product management, data science, content creation, etc.

## APPENDIX I: KEY LITERATURE

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<https://www.worldskillsuk.org/news/new-research-highlights-uk-digital-skills-gap/>

NESTA – Delivering Digital Skills: Preparing the Workforce for an inclusive digital economy (2021)

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NESTA – Analytic Britain: Securing the Right Skills for the Data-Driven Economy (2015)

<https://www.nesta.org.uk/report/analytic-britain-securing-the-right-skills-for-the-data-driven-economy/>

Tech UK – Fast Forward for Digital Jobs (2021)

<https://www.techuk.org/shaping-policy/fast-forward-for-digital-jobs-report.html>

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## APPENDIX II: STAKEHOLDERS, PARTNERS, EMPLOYERS AND DIGITAL EXPERTS CONSULTED

We would like to thank the following for their time and input towards refreshing the Digital Skills Strategy for Digital Jersey:

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