

DIGIT:AL ISLE OF MAN

PROGRAMME 2023





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MINISTER'S FOREWORD

Digital Isle of Man was established in May 2018 as one of four Executive Agencies within the Department for Enterprise.

The agencies were created to:

- Proactively enable and facilitate the right environment to allow the specific sub-sectors to flourish
- Be responsible for developing prioritised industry strategies
- Establish a strong relationship management approach for large and growing companies
- Understand the pathways for growth and highlight any barriers preventing organic growth from our existing businesses

Digital Isle of Man has played a pivotal role in driving economic growth by supporting and nurturing an innovative and dynamic digital agenda. Today, it also plays an increasingly important role in the Island's economy, community and lifestyle, as a significant stakeholder in developing the digital aspects of Government, society and, more directly, business.

The digital sector now accounts for more than 30% of our economy and covers a wide range of businesses with specific initiatives, including eGaming, esports, FinTech, blockchain, Smart Island (Internet of Things), data management, digital media, software development, infrastructure and digital skills development.

In addition to the obvious economic advantages, the diversity and reach of the digital economy also has a vital part to play in creating new job opportunities as well as supporting wider aspirations such as diversity, equity and inclusion, plus hybrid working models. Not only does this give increased opportunities for talented local people to pursue careers here in the Island. It also supports initiatives to attract skilled workers from other jurisdictions to move here to live, work and learn.

Digital technology impacts all sectors of the economy. Its power to drive positive change can be seen most clearly in FinTech where it has transformed the evolution of the finance sector which for decades has been the foundation stone of the Isle of Man's reputation as a leading international business centre.



HON. LAWRIE HOOPER MHK
MINISTER FOR ENTERPRISE

Development of a new strategy and initiatives to embrace this evolution and make it easier for our finance sector to innovate is key to maintaining their global competitiveness going forward. This is an exciting new development where we are combining two pillars of our economy, digital and finance, to create new opportunities to showcase our adaptability and relevance in a global marketplace.

The digital agenda also goes beyond the private sector. Digitisation can make public services more accessible and efficient, providing everyone in the Island with modern and convenient access to services, driving efficiencies and improving access. At the same time, we have to find a balance between the digital services provided and the real people that sit behind them, making sure that we have the people capability and resources for frontline services to ensure all parts of our community are best served by Government.

Digital Isle of Man and the Department for Enterprise are driving the strategy and capability that digital technology has to enable positive change and economic development. This is why investment and innovation in this sector is an integral part of Isle of Man Government's strategy to create a secure, vibrant and sustainable economy.



CEO'S EXECUTIVE SUMMARY

Digital Isle of Man's focus is on looking at the broad range of digital capability emerging through global markets. We identify niches that align with our capabilities, aspirations and risk appetite, and drive initiatives that allow Isle of Man businesses to develop and thrive.

In pursuing this approach we continue to strengthen our partnerships with industry across a number of sectors and across Government to create a coordinated approach to ensure that the maximum number of benefits accrue to the greatest number of participants. The strength of the business community is a significant advantage that we continue to draw upon to support a progressive ecosystem.

We have an ambitious programme for 2023 and beyond to ensure that we become a jurisdiction of choice for tech businesses and entrepreneurs. The road towards this goal includes significant initiatives, including:

- **FinTech** – We are developing a FinTech strategy which incorporates all of our knowledge about crypto derived from our learning in the Blockchain Office. Whilst this will have other aspects to it, we will seek to clarify the positioning of crypto assets and which elements of this we would like to support going forward. To help develop this strategy, we have brought forward two very exciting support structures, namely the Fintech Innovation Challenge, a global competition based on four challenge statements solving wide ranging issues on the island, and the Fintech Innovation Hub, a collaboration between Digital Isle of Man, Finance Isle of Man and the FSA which will review incoming FinTech propositions and potentials. Such outreach and collaboration are essential to allow us to keep pace with the fast pace of change in the FinTech space which, by its nature, can be very disruptive
- **Data** – We are exploring the development of a specific data proposition which is investigating our capability to use data protection legislation to create a context for supporting the storage and processing of data that has high value. There are some unique capabilities that we



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possess in this area that, if developed correctly, could create a very compelling rationale for the Island to become a centre of expertise for data analytics and artificial intelligence. As data is now being cited as the 'new money', positioning in this space is very timely and relevant.

In addition, we are contributing to the digital Government agenda by being a stakeholder in:

- Supporting connected data, connected thinking and intelligent decision making
- Finding an innovative and co-operative solution to the acquisition of skills
- Working with the other Crown Dependencies and British Overseas Territories to solve common problems

The Island's **Infrastructure** Initiative – which is delivering the National Broadband Plan and aims to make 1Gb broadband available to everyone – is also now well-advanced and an illustration of Digital Isle of Man supporting the enablement of structural items that are essential building blocks to the digital economy as a whole.

We are continuing to deliver on our existing initiatives and are refreshing strategies for **Smart Island** and **esports**, and creating a new initiative in order to deliver a **Digital Academy** for the Island to enhance the skills of the local workforce.

We are going to continue to partner with industry to drive growth of the **eGaming** sector and its supporting ecosystem, and widen the appeal of our licence.

We will continue to work on building greater visibility and an understanding of Digital Isle of Man across our wider stakeholders.



OUR POTENTIAL

THE ISLE OF MAN IS IDEALLY PLACED TO EXTEND AND EXPAND ITS CURRENT STRENGTHS IN A STRATEGIC MANNER TO DEVELOP AS AN EVER EXPANDING AND VIBRANT HUB OF DIGITAL TECHNOLOGIES, INTEGRATIONS AND LEGISLATIVE AND REGULATORY POSITIONS.

We have all the foundations in place to promote balanced business, ethics and sustainability – and this in turn will support continued growth in this important sector of the Island's economy.

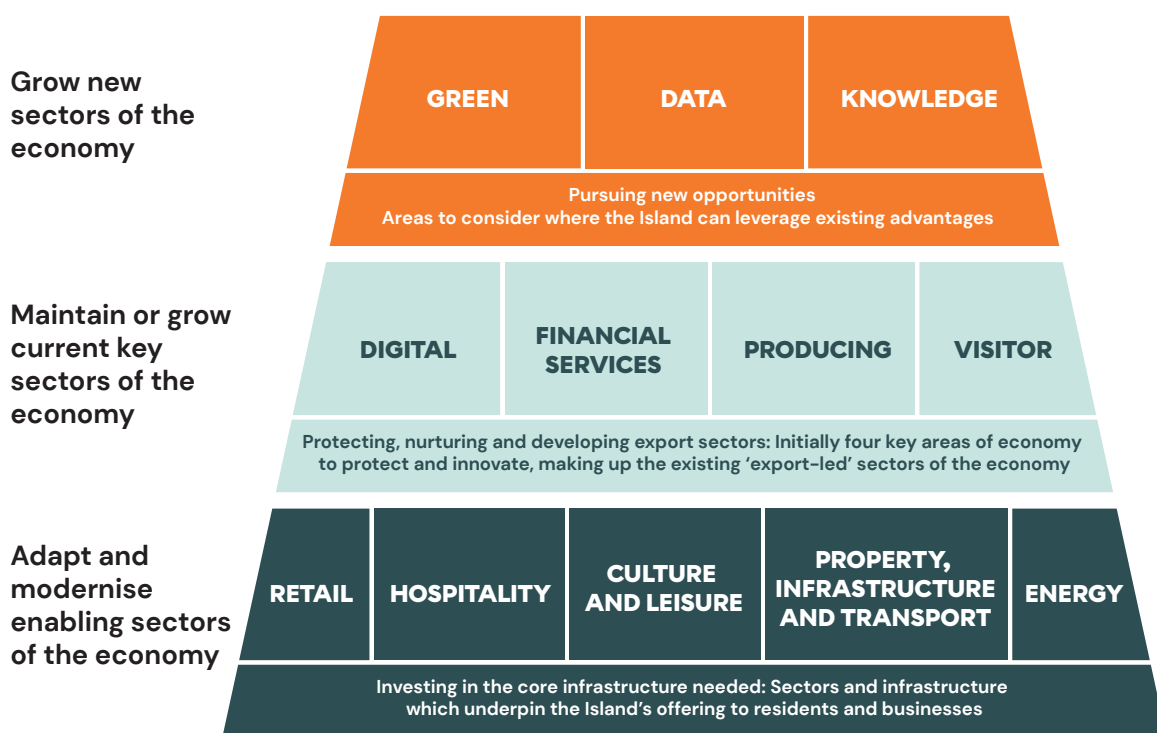
We are able to:

- Create highly regarded, globally relevant, regulation and legislation
- Develop a protective privacy environment for high value data
- Give access to a highly integrated and supportive business community (including Government)
- Support innovative trials

We need to leverage these attributes to best effect as we continue on our journey of making the Isle of Man a place to do good business well.

Digital Isle of Man continues to be excited and optimistic about meeting the challenge to drive forward the digital position of the Island to progressively make it an outstanding place for all of those who live, learn and work here, both economically and socially.

OUR ROLE IN THE ISLAND'S ECONOMIC STRATEGY



The digital sector is a key element in Government's strategy to ensure the Island's future prosperity.

It has a role to play in:

- Increased business productivity
- Driving business innovation and investment
- Attracting more highly skilled professionals from the sector to work here, which in turn enhances the skills of the Island's workforce
- Business-focused digital and technology adoption and infrastructure investment
- Supporting labour market migration and employment enablement

To support this we are creating and implementing policies to improve individuals' business-ready skills, knowledge and experience.

The 'Data Economy' is one of the most valuable assets of the 21st century, so leveraging the Island's

strengths in regulation and security means we can offer a unique proposition for data businesses.

Our digital sector needs to continue to diversify to support the expansion of businesses both within the eGaming sector and beyond.

However, there are global headwinds coming which will affect the financial services sector. As part of the Island's Economic Strategy there is a need to help the sectors digitise, engage with ESG, innovate, and manage increasing regulatory pressure.

In that context, Digital Isle of Man will need to continue to contribute to the development of a knowledge economy to create niche educational and training campuses based on the Island's sector strengths.

In addition, we would look to support the development of green businesses on the Island through our Smart Island initiative and beyond.

OUR STRENGTHS

Here are just some of the Isle of Man's strengths as a centre of excellence for digital technology and infrastructure:

- Top 10 percentile globally for internet speed
- We have very high 4G coverage with 131% mobile usage in the population, high speed fibre now available to 75% of premises and increasing
- 84% of businesses surveyed recognised technology as integral to their businesses (8-10 on a 10-point scale)
- The Island hosts a large and growing number of prominent and high-quality global brands in the digital sector
- Multiple Tier-3 data centres and resilient backbone communications, including satellite
- Well-respected internationally for stability and sound regulation
- 96% surveyed strongly agree the Isle of Man is a safe place to do business (2019)
- Government has a net-zero emissions strategy and the Island holds UNESCO Biosphere status
- We have a large level of untapped economic value driving opportunities, and a proven ability to regulate and grow targeted niche sectors
- A competitive tax regime

OUR ASSETS

Here are our most important assets as a centre of excellence for digital:

- Highly regarded both for the standard of the digital sector, and as a leading international business centre
- Embraces innovation within a dynamic, appropriately regulated environment
- Strong ecosystem for digital
- Supportive of importing skills and talent (51% of population is non-indigenous)
- Space and appetite to grow
- Host to a large number of prominent and high quality global brands
- Attractive work/life balance and ability to fully support hybrid working

OUR CHALLENGES

While the Island has many opportunities, there are some challenges too which Digital Isle of Man, Department for Enterprise, and Government are working hard to address:

- Skills shortages: Key skills are in critically short supply for our digital businesses. The Island needs to be an attractive place to relocate to for business to thrive
- Innovation: Growth is increasingly centred on a small number of businesses in established markets, and these sectors may need support to continue to evolve to ensure they remain strong and relevant
- Digitisation is expected to impact 30% of jobs in the Isle of Man over the next 15 years. That means all businesses will need to continue to invest in digitisation to evolve their workforce and skills to remain competitive
- GDP growth has mainly been driven by two sectors, insurance and eGaming – both of which are highly concentrated due to consolidation
- Sustainability and energy security policies are not yet established, but both are critically important to business, particularly the digital community. At present, greenhouse gas emissions per capita exceed the comparator group and could be a potential inhibitor to growth
- Government is not perceived to be digitally enabled and is suboptimal in its use of data
- Stakeholder feedback indicates that innovation and business dynamism are not currently a strong feature of the Isle of Man's business culture, but it has been in the past
- Regulation and red tape (particularly in financial services) and access to capital are major obstacles for growth and innovation

OUR HEADLINE TARGETS & OBJECTIVES

- 10% year-on-year growth of jobs and licenses
- Define and legitimise good business practice and regulation in emerging sectors
- Establish the Isle of Man as a globally recognised tech and regulatory hub



OUR PRINCIPLES

Digital Isle of Man is guided by a key set of principles which drive everything we do. We work hand in hand with our stakeholders to create and deliver value for the Island as a whole, as well as the businesses and individuals that call the Isle of Man home. It's with this true partnership approach that we work together to grow the digital economy.

GROWTH

Our strategy focuses on a 60/40% split across growth of existing business on-Island versus new business relocation. We work with our digital ecosystem to identify catalysts for growth to continuously improve the Island's value proposition, ensuring that the Island's offering remains appealing and relevant.

In addition, we work closely with our stakeholders to identify and remove barriers to business growth. Using a collaborative business development approach, we also help the strong and experienced supporting sectors within the digital ecosystem to go to market.

TECHNOLOGY

We aspire to lead by example in the use of technology and innovation within Government by exploring emerging technologies, and how they can be utilised to improve business processes in both Government and industry.

INSIGHT COLLABORATION

Digital Isle of Man builds strong partnerships by collaborating with industry, which means we are ideally placed to act as a communication channel between the Government and the private sector, and vice versa.

We listen to key players in the industry to understand issues, ideas and priorities, and formulate and present action plans back to Government for consideration. This process enables businesses to leverage Government knowledge, assets and data.



OUR ACTION PROGRAMMES





EGAMING

Our online gambling businesses and the ecosystem that support them are thriving. This is due to external factors and a change in approach to how Digital Isle of Man supports the ecosystem. The predominant focus has been enabling our existing on Island businesses to grow. We work closely with businesses to identify barriers to growth alongside opportunities for the sector. Digital Isle of Man works across government to remove any obstacles that exist and to suggest ways in which processes can be streamlined to create more beneficial outcomes.

Whilst this sector has shown considerable growth on Island in the past three years, Digital Isle of Man recognises that new policies need to be considered, new products should be developed, and promotion activities are increased to promote the Isle of Man.

OBJECTIVE

- Drive continued growth of the eGaming sector and the supporting ecosystem

KEY RESULTS

- 200 new jobs created in the Isle of Man's eGaming sector in 2023 (from 194 delivered in 2022)
- Grow to a total of 80 live GSC licences by the end of 2023 (from 75 at end of 2022)
- Deliver at least two licences into new markets by the end of 2023

ACTIONS

PROMOTION

Through our marketing strategies, Digital Isle of Man is leading a market development strategy which includes:

- Market research and segmentation analysis
- Branding and reputation development
- Raising awareness via PR, press and social media campaigns
- Focused campaigns
- Industry delegations to target markets
- Marketing and business development evaluation and conversion research
- Isle of Man presence at significant online gambling events
- Targeted 2023 conference schedule with wider and deeper reach, including Latin America, Africa, and Asia

POLICY

- Helping existing business to expand, enabling access to financial support and working closely to streamline global mobility logistics, where appropriate
- Engage with governments with regulatory challenges to encourage them to consider the validity of an Isle of Man licence in their jurisdictions
- To increase the relevance of the Isle of Man licence by working with other governments and/or regulators and encouraging them to consider the server location requirements of the Isle of Man Gambling Supervision Commission (GSC) licence
- Consider changes to the Island's casino licensing policy
- Support and encourage new, highly skilled people into the ecosystem
- Review Tax/Digital Tax/Pillar 2 and VAT plans for the future

PRODUCT

We are considering whether there is an appetite within the market for a new regulated product type.

In addition, we are also looking at:

- Opportunities to offer Regulation as a Service (RaaS) to countries looking to rapidly regulate
- Passporting Isle of Man OGRA licences for pre-regulated markets looking to regulate quickly and use an Isle of Man licence to enable the issuing of a temporary licence
- RegTech (Regulatory Technology): In this area there's the possibility to regulate KYC/compliance providers who are onboarding players. This would be a way to certify that providers are meeting minimum GSC criteria on KYC/AML procedures and ongoing monitoring for transactions AML/CFT and other compliance activities
- Certifying/licensing affiliates to provide operators and regulators with peace of mind because they would be sure that affiliates were not marketing to the wrong target groups or using questionable practices that could incur regulatory fines for the operators. We plan to test the water with the biggest affiliates to see what they want and need from regulation



FINTECH (INCLUDING BLOCKCHAIN)

In 2018 Digital Isle of Man created a strategy to bring blockchain enabled business to the Isle of Man. Since then we have attracted many crypto-based businesses to the Island and – following work by Digital Isle of Man and Isle of Man Financial Services Authority (FSA) – pathways have been identified to enable the expansion of the wider FinTech ecosystem.

In 2022 there were 66 new jobs created in the Island’s blockchain/FinTech sector. To build on all this work we are now developing enhanced working paths between the Digital and Finance executive agencies and the FSA around a new FinTech Innovation Hub to encompass an FSA sandbox (managing regulated propositions) and an Agencies Observatory (managing potential future regulated propositions) to deepen our understanding of dynamic developments. This will provide an insight into the further development of a FinTech ecosystem, including defining our place in a developing crypto space, using experience, and practical learning and a well-defined risk strategy.

OBJECTIVE

- Establish a wider FinTech ecosystem and collaborate with Finance IoM and FSA

KEY RESULTS

- 80 new jobs created in FinTech (including blockchain) in 2023 (from 66 delivered in 2022)
- 10 new FinTech businesses registered as a designated business in the Isle of Man in 2023
- 4 new FinTech related live licences in 2023

ACTIONS

PROMOTION

Using the FinTech Innovation Challenge, the Fintech Innovation Hub and the Insurtech Accelerator Programme – and in partnership with Finance Isle of Man and the Financial Services Authority – we will complete the following:

- Market research and segmentation analysis
- Branding and reputation development
- Awareness raising PR, press and social media work
- Focused campaigns
- Industry delegations to target markets
- Marketing evaluation and conversion research
- We will ensure that the Isle of Man has a presence at significant FinTech events (including crypto)

POLICY

- To help existing businesses to expand, enable access to financial support, and to work closely to streamline global mobility logistics, where appropriate
- Work closely to facilitate integration with global FinTech capabilities where beneficial to do so
- Engage with applicants and stakeholders for the FinTech Innovation Challenge to maximise general business benefit from the solutions provided
- Support and encourage new, highly skilled people into the ecosystem
- Enable an advanced digital e-signing framework via new Electronic Transactions and eIDAS legislation

PRODUCT

Launch the FinTech Innovation Hub and demonstrate success of the model by:

- Considering opportunities to leverage technology to streamline the regulatory oversight function of the regulator – eg, RegTech and SupTech (Supervisory Technology)
- Creating clear guideline definitions for different types of digital assets
- Providing clear pathways and expectations for the consideration and assessment of new and innovative propositions coming to the Island, with consideration of possible regulatory change if required
- Develop FinTech Marketplace of FinTech component solutions with 20% year on year increase of Isle of Man verified interconnected solutions available
- Define what the different components of FinTech mean to and for the Isle of Man ecosystem

ESPORTS

Our vision for esports is to create and support a global centre of excellence for the industry. That would create a go-to-market USP for the Island in the form of proactive regulation, and by enabling our existing on-Island businesses to prepare services for the emerging sector. As these steps have been undertaken, business development and job creation have fallen behind their targets while the Isle of Man offering to the esports industry has been clarified. We recognise that new policies need to be considered due to the lack of realised benefit to date, and that new products need to be developed and promotional activities increased to drive growth in the Island's esports ecosystem.

OBJECTIVE

- Establish an esports/video gaming presence in the Isle of Man and publish the Island's revised strategy

KEY RESULTS

- Bring the first esports/video gaming companies to the Isle of Man resulting in 10 new jobs in 2023.
- 10 new esports/video gaming clients supported by the Island's businesses in 2023
- Review the Island's regulatory approach to esports and agree a revised strategy by the end of Q2 2023

ACTIONS

PROMOTION

- Run a promotional campaign demonstrating the Isle of Man's ability to support the esports sector, centred around an agreed catalogue of services
- Partner with CSPs, law firms, and other ancillary service providers to promote the Island's esports aspirations
- Leverage the media and PR partnerships of Digital Isle of Man to progress esports initiative branding and reputation development, and enact PR, press and social media campaigns around key milestone targets
- Focus on an improved digital distribution channel to attract businesses to the Island
- Isle of Man presence at significant esports and video games industry conferences
- Targeted approaches to key sector participants



POLICY

- Reconsider the Island's approach to esports and the wider video gaming industry:
 - Consider opportunities to bring individuals in esports to the Island, such as content creators and team owners
 - Consider opportunities for businesses to be attracted to the Isle of Man such as tournament operators, analytics platforms, game developers and publishers
 - Consider the place of platforms in the integration and deployment of rules and regulations
- Support existing Isle of Man businesses to expand services into a new sector

PRODUCT

- Deliver a refreshed esports/video game industry strategy
- Continue to partner with industry to expand the Island's services catalogue
- Development and utilisation of esports marketing collateral
- Consider product offerings specific to the esports/video game industry
- Gauge the market appetite for a new regulated product by consulting publishers, tournament operators and other key stakeholders
- Determine the validity of acquisition and Isle of Man relocation of recognised industry governance actors and platforms



SMART ISLAND

This is our Internet of Things (IoT) initiative which began towards the end of 2020. The goal was to promote the use of IoT for the social and economic development of the Island. We rolled out a nationwide low cost IoT network which encouraged testing, developing and commercialisation of IoT solutions. We launched several projects, including the original indoor air quality monitoring trial at Scoill Phurt le Moirrey in Port St Mary which saw us featured in a global air quality annual report.

We have generated positive publicity on and off Island and recognise that we could do more with a clearer focus, especially one that moves away from focusing on technology and towards talking about the benefits and outcomes. Smart Island reflects a wider digital transformation and directly supports objectives in the Government's Island Plan and Economic Strategy. This initiative is an enabler for our data economy, as well as a compelling sales pitch on the future of our Island to those interested in setting up new businesses or trials, or moving here to live and work.

The three pillars of a smart nation plan are:

- Digital government
- Digital business
- Digital society

Partnering with Government Technology Services (GTS), Digital Isle of Man will deliver infrastructure to enable IoT innovation, champion IoT within Government to drive efficiencies, and business friendly policies on data use. We are also committed to supporting industry to show how digital technologies can increase productivity, improve sustainability, and to securing global coverage of our Smart Island journey.

OBJECTIVE

- Drive a culture of smart Government to show businesses and citizens the tangible benefits of real time open data, leading to smarter decisions

KEY RESULTS

- Provision of a data distribution platform and visualisation by the end of 2023
- Identify and engage Smart Island champions across all eight Government departments in 2023
- 12 new projects in the public domain by the end of 2023



ACTIONS

PROMOTION

- Regular publication of articles to continue building our voice of authority on Smart Place, IoT and data related themes. This also supports our local tech partners as guest authors
- Isle of Man presence at significant Smart Place and IoT events

POLICY

- Collaborate with industry and across Government to promote and share learning and best practice for example data policies that balance privacy and security with innovation for industry
- We will champion open data by default, and support others to use IoT technology to measure and monitor what matters in real time, for evidence-based policy making

PRODUCT

- Working with GTS we will ensure that our new data distribution platform makes it easier for people to share their IoT device data in a way that works best for local innovative developers
- We will fund and deliver 12 proof of concept trials through the year within Government departments or in the third sector, and publicise the benefits that are realised, whether they are in terms of cost saving, better societal outcomes or innovation in product or service delivery
- Once the Government IoT champions are identified we will work together on a forum that allows for collaboration and prioritisation of proof-of-concept project ideas



DATA

The Isle of Man is committed to exploring opportunities in developing a data proposition for the Island. As part of the economic strategy, Digital Isle of Man is examining and evaluating the viability of establishing an innovative legislative environment which is supportive of data driven industries, particularly around high value data and sophisticated analytics and artificial intelligence (AI). Work is underway on this, and stakeholder workshops have been taking place during October with key stakeholders.

Digital Isle of Man is developing a set of propositions which would seek to create an environment which promotes the Island as a jurisdiction for safe and private sovereign data storage and handling. We aim to increase its attractiveness to digital industries internationally, becoming the physical, legal, safe and stable home of globally recognised significant data.

This is a challenging initiative and likely to become a multi-year programme. However, there must be a focus on delivering value as early as possible. As such it is likely to be a tactical workstream through the first year to deliver any quick wins which may be identified.

OBJECTIVE

- Leverage the Island's regulatory framework and security to offer a unique proposition for data businesses

KEY RESULTS

- Complete an analysis of options for the Isle of Man to consider with recommended actions by the end of 2023
- Develop and agree a programme plan to deliver an approach and benefits to the Isle of Man by the end of 2023
- Create the governance structure required to ensure the plan is resourced and funded by the end of 2023

ACTIONS

PROMOTION

Through agreed marketing strategies the programme will develop and lead on:

- Market research based on the findings of the final report
- Global awareness of the identified opportunities
- Business development of the market research

POLICY

- We will agree on a policy regarding the identified outcomes at a departmental and political level

PRODUCT

- Develop a programme plan and roadmap of deliverables based on the output of the report and agreed policy directives
- Develop a workstream to deliver and identify agreed quick wins in a shorter timeframe



DIGITAL ACADEMY

Although it's not a unique problem to the Isle of Man, the availability and quality of digital skills is a key issue. This is because of the scale and ambition that lies within the digital sector, and also the need for digital competence across all business sectors and Government. It also has to take into account our ambition to increase general digital literacy across the populace so that they can gain maximum benefit from digital initiatives.

This means that we need to manage and promote constantly evolving programmes that meet two needs:

1. The specific business needs that are defined by our existing businesses and the new incoming businesses to allow them to innovate, grow and prosper. This involves continued career progression for those already within the industry whilst adapting to changing technology. But it also requires reskilling to meet the evolving needs of the economy to help the workforce to develop new skills, and enable career changes.
2. Encourage and develop general digital literacy to reduce the potential for digital exclusion, while also increasing the adoption of transformation technologies that will drive personal, governmental and business efficiencies.

OBJECTIVE

- Establish a centre of digital learning, open and free to all, which will be appropriate for business and individual needs.

KEY RESULTS

- Investigate the opportunities to create joint learning initiatives with other jurisdictions
- Develop and agree a plan to provide a digital academy which benefits the Isle of Man by the end of 2023
- Secure political support and funding to provide a digital learning programme to the Isle of Man by the end of 2023

ACTIONS

PROMOTION

- Run a promotional campaign on the need for digital lifelong learning, and the toolsets to learn them with mentors in pre-defined hands on-environments
- Partner with charities to support learning initiatives
- Run a promotional campaign to encourage personal professional development within the digital learning systems provided
- Create a skills request registration system for businesses and individuals which allows training to be customised for each individual
- Create defined career pathways and link to the required resources being identified in the skills matching being done by Locate Isle of Man

POLICY

- Define the level of ambition to be placed on a Digital Skills and Literacy Agenda

PRODUCT

- Delivery of training venues and delivery capability
- Consider carefully the mix of face to face teaching with remote learning that utilises new technologies to best effect
- Define the content, partner agencies, and the development of the initial programme
- Define the delivery measurements and metrics via data and surveys



INFRASTRUCTURE

The National Telecoms Strategy is entering its final phase with over 80% of its strategic actions now complete. The National Broadband Plan (which is the most significant part of the strategy) is on track to be completed by August 2024. Digital Isle of Man continues to monitor developments and, in particular, 5G. We are also focused on alternative technologies which might provide a solution for the 1% of premises that will not have access to the fibre network (this may also include financial support for those unable to connect to the network). To maximise the benefit of the programme we will be placing additional focus on encouraging businesses and the general public to connect to fibre.

There remain elements outside of the National Telecom Strategy which will require effort to support and complete. For example, the work with external relations to develop and implement telecommunication reservations in the upcoming trade negotiations or work on implementing the National Security Framework alongside the UK and other Channel Islands.

OBJECTIVE

- Finalise the remaining elements of the National Telecoms Strategy, focus on driving more connections to fibre whilst monitoring the sector and any emerging policy priorities

KEY RESULTS

- Continue National Broadband Plan with 90% of homes passed by the end of 2023
- Improve connections to the fibre network for those that have access to it from 37% to 50% by the end of 2023
- Proposition agreed to connect the final 1% of those unable to connect to the fibre network



ACTIONS

PROMOTION

- Website to remain updated and relevant to the position of the National Broadband Plan rollout
- Provide continued support, through positive promotion, for the increased number of connections on the new fibre network

POLICY

- Policy has been agreed regarding support for the final 1% of premises including funding commitment
- A framework has been agreed to support e-Ilan Communications Ltd meet the needs of local business and the finalised Data Strategy
- Support the development and delivery of changes to the PDO legislation by February 2023
- A policy directive has been agreed on the implementation of new telecommunications security legislation

PRODUCT

- Delivery of a 5G report concentrating on the potential benefits and timelines for implementation
- Implement ways to incentivise connections to the fibre network by the end of the National Broadband Plan project
- Introduction of telecommunication security legislation, in conjunction with the UK and other Crown Dependencies, to enhance the protection afforded to the Islands telecom networks. This will be in place by the end of the National Broadband Programme

CONCEPTS/FUTURISM/ HORIZON SCANNING

Digital technology is always changing and therefore needs to be constantly monitored to maintain currency of thinking and competitiveness. It also has to be understood that the digital context can span many initiatives and sectors. Therefore, we have to think about digital capability and opportunity in that broad context. That means we have to insert items into current initiatives from other sectors, draw out work that will aid and assist multiple initiatives, and seek out new opportunities or niches that we should work on.

There are also a number of structural supporting items that create the correct environment (or image) for the Isle of Man to flourish, but which have no (or no immediate) benefits for business.

Such activities will also involve maintaining currency or expanding on opportunities made available via appropriately innovative legislation and/or regulation.

As new items present themselves, based on research, we will move them to operational initiatives in order to understand the scope of the work that's required, and the resources that need to be deployed.

OBJECTIVES

To ensure that we stay current as a digitally enabled jurisdiction, and that our digital capabilities are coordinated to give the best possible outcomes in the most efficient manner possible.

POSSIBLE FUTURE ACTIVITIES

- **Collaborative education capabilities:** Looking at how we might achieve economies of scale by collaborating with other offshore jurisdictions and regional education centres/providers
- **Use of RegTech:** Looking at in support of both the regulators
- **GDPR/Data protection reconstruction:** We will continue to support the principles of protecting the individual and their data. As an adjunct to the data proposition, we will need to look at an update of our GDPR position, particularly as it is likely that the EU and UK will diverge on this. There is also an opportunity to do this collaboratively with the other Crown Dependencies
- **Consideration of a central 'Digital Act'** which is now being done in the UK. This would provide a clear digital pathway through legislation
- **Digital legislation watching and comparative brief:** Maintaining the need to be current in a global context
- **Digital company/trust types and share registers:** There is a need to look at how digital company structures can be conveyed within our legislation
- **Digital private equity asset types/exchanges/smart contracts:** There is a need to look at how digital assets are represented in our legislation, taxation, and estate management
- **Virtual Spaces:** This is the potential for the extension of workplaces and educational facilities into the virtual world including the use of Virtual Reality (VR), Augmented Reality (AR), and potentially the Metaverse as it matures further

POSSIBLE FUTURE ACTIVITIES CONTINUED

- **Digital skills framework:** This involves looking at the skills gap issue for lifelong learning and definitions of career changes. We need to look at how we can define career paths and the training/capabilities that align to these
- **AgeTech:** To support our aging demographic (prior to this changing as the economy is developed) we should investigate what technology can be applied which is both assistive and also 'testbed' in nature
- **HealthTech/Telemedicine:** To support the health system (without adding pressure to import skills, and bearing in mind the lack of critical mass) we could consider the use of technology to get remote access to the most highly skilled resources
- **Digital twin:** This means looking at the merging of the physical world (largely via sensors) and creating 'digital twins' to model and monitor outcomes
- **Artificial Intelligence/Machine Learning:** In conjunction with large data, consider the opportunities and associated ethics of machine-based decision making
- **Crypto Asset Definitions/Web3:** Consideration of Crypto Definitions/Taxonomies as part of our relevance to the global conversation on these items
- **Autonomous vehicles:** Consider whether autonomous vehicles (land, sea and air) could be considered and/or trialled here, along with consideration of regulation, ethics and standards
- **Environmental/sustainability/ESG initiatives:** In line with our Biosphere status, consider opportunities to develop this dialogue in the tech arena
- **Energy solutions/renewables:** To support our green agenda and also ESG initiatives, we should look at technology to support the energy sector

MEET THE TEAM

TEAM MEMBERS



Lyle Wraxall
CHIEF EXECUTIVE



Abby Kimber
HEAD OF STRATEGIC
PARTNERSHIPS



Kurt Roosen
HEAD OF INNOVATION



Richard Oliphant
DIRECTOR DIGITAL
INFRASTRUCTURE &
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Andrew Honour
DIGITAL INFRASTRUCTURE
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MANAGER



Sarah Ennett
SMART ISLAND PROGRAM
MANAGER



Josh Kingett
ESPORTS EXECUTIVE



Liam Slack
ESPORTS EXECUTIVE



Nathan Lunt
STRATEGIC PARTNERSHIP
MANAGER



Chris Reilly
STRATEGIC PARTNERSHIP
MANAGER



Gareth Pryce-Jones
STRATEGIC PARTNERSHIP
MANAGER



Tara Leneghan
STRATEGIC PARTNERSHIP
MANAGER



Cheryl Gleeson
MARKETING MANAGER



Liam Finch
MARKETING EXECUTIVE

BOARD MEMBERS



Phil Adcock
BOARD CHAIR



Ann Corlett
POLITICAL MEMBER



Lyle Wraxall



Jaime Amoedo



Joanne Thurlow



Mike Bromwich



Deb Byron



Greg Ellison



Lee Hills



Russell Kelly



Gary Lamb



Katie Nicholson



Greg Ansara



Mark Lewin*



Cheryl Gleeson*

*Non-voting board members.

ABOUT DIGITAL ISLE OF MAN

OUR DELIVERY

Digital Isle of Man is focused on creating and delivering value to our stakeholders. We do this by taking the time to understand their needs, driving open and honest conversation to identify what they value, and what they need to succeed. We use feedback to propose solutions and to inform strategic direction which ensures that we deliver on our actions.

OUR STRUCTURE

The Digital Isle of Man Strategic Partnership Model was created in 2019 with a focus on....

- Improving relationships with industry
- Facilitating and tackling barriers to business growth
- Attracting new businesses to the Isle of Man

The model also plays an instrumental role in enabling job creation by supporting tech businesses across different sectors and helping to fulfil the demand for skilled workers

GOVERNMENT SUPPORT

Digital Isle of Man works to highlight the range of business support schemes offered by the Department for Enterprise. These schemes offer funding, plus training and advisory services for businesses as they start, grow and invest in the Isle of Man

MONITORING & REVIEW

- Through our Annual Report we evaluate our success over the year across our digital initiatives, identifying areas of opportunity and future plans
- Digital Isle is Digital Isle of Man's flagship event on-Island which sees people from across the Island's digital industry come together to learn, share knowledge and feedback, network, and better understand developing trends, threats and opportunities within the sector
- Quarterly reporting to the Economic Strategy Board, and a full review
- Through our Strategic Account Management Process we work side-by-side with industry to....
 - resolve issues which impact business growth
 - share knowledge and plans for the strategic direction of the Island
 - ensure that the voice of industry is heard and delivered to the relevant area of Government
- We work collaboratively with our supporting sectors on-Island to manage opportunities through our Business Development Pipeline. This involves tracking opportunities that lead to direct and indirect economic growth, and analysing the data that's collected to identify trends and inform future focus and decisions

OUR PARTNERSHIPS

Digital Isle of Man works with a wide range of stakeholders across the Island's business ecosystem to help grow and strengthen the Isle of Man's digital economy, with the ultimate goal of achieving mutually beneficial results.

This collaborative way of working across the public and private sector helps our ecosystem to feed into the strategic direction for the Isle of Man. We take into account businesses' aspirations, needs and concerns and make sure that these are considered when solutions and services to support business growth are suggested.

Here's a summary of our business partnerships:



ON-ISLAND TECHNOLOGY BUSINESSES

We work closely with digital businesses here on the Island through a strategic account management programme to resolve issues and barriers, and feedback their needs and concerns to Government initiatives which impact them.



SUPPORTING BUSINESSES

We help our strong and experienced service providers in the digital ecosystem to go to market with the Isle of Man brand. This is done via a collaborative business development approach which means working together to land opportunities to drive forward the Island's digital economy.



INDUSTRY BODIES & BOARDS

We collaborate with industry bodies such as the Chamber of Commerce and the eGaming Strategic Advisory Board to gather feedback, ratify concepts around the strategic direction of our digital initiatives on the Island, as well as wider matters which impact the success of our digital economy.



GOVERNMENT AGENCIES & DEPARTMENTS

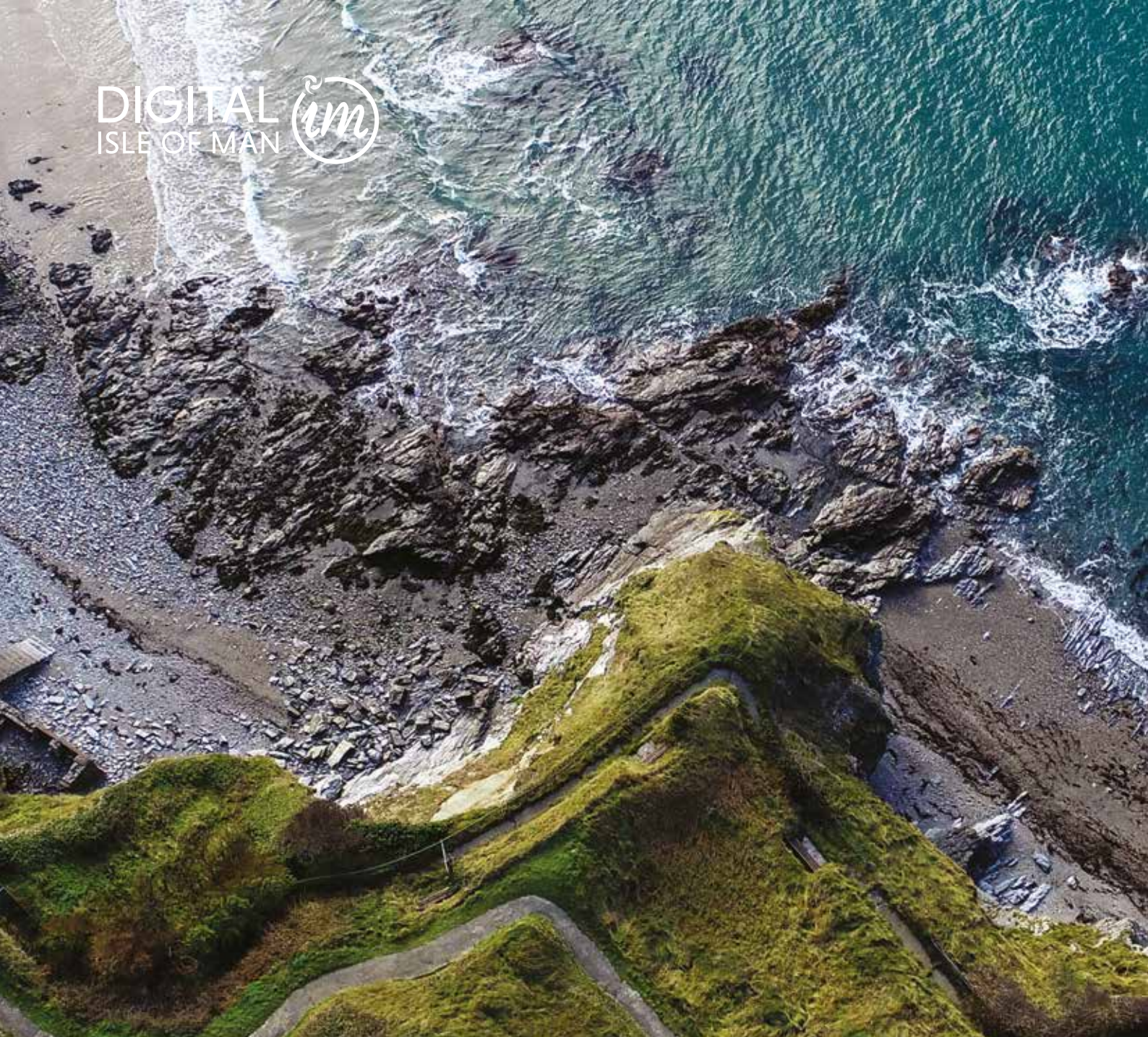
We act as a conduit between other areas of Government and industry to ensure two-way flow of information, feeding back needs and concerns from industry to the relevant areas of Government. This ensures that information from Government is relayed effectively to the business community. We also work collaboratively on overarching strategies such as the Workforce Strategy and plans for Digital Government.



OTHER UK FOCUSED CROWN DEPENDENCIES AND OVERSEAS TERRITORIES (SPECIFICALLY JERSEY, GUERNSEY & GIBRALTAR)

In a complex global environment, there are an increasing number of problems and solutions, which hold common ground with similarly structured jurisdictions. We need to actively explore those items where a common approach has an advantage of scale, efficiency and greater global recognition.

DIGITAL
ISLE OF MAN



LOOKING AHEAD



For many years, the Isle of Man has become an increasing digitally focussed economy, led by the requirements of the businesses that have located here. Whilst this has significantly advanced elements of our infrastructure, such as data centre provision, communications and cyber security, not all digital aspects have been able to move at the same pace.

The global economic picture is now one which is dominated by a future digital agenda as every type of business and Government become increasingly reliant on technology. Our current advances, prompted in part by a vibrant and highly digital eGaming sector, place us in a good position to continue this process and increase the pace and sophistication of this development.

We are, therefore, at an exciting point of development where we need to embed digital capability across the entire community and economy, being aware of the barriers and challenges that may be faced, and be prepared to find solutions to these. From a Digital Isle of Man perspective, this means providing input and guidance to creating meaningful solutions, building resilience and innovative capability that will allow us to remain ahead of the curve in the decades ahead.

This a very exciting but demanding challenge that we want to do in such a manner that it allows us to command a significant voice on the world stage by applying our own unique brand of business, sustainability and ethics, through legislation, regulation and innovation that we believe is unique.

ISLE OF MAN OPENS

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