







INSTITUTE FOR ICT PLANNING & EVALUATION (IITP)



DIGITAL TRANSFORMATION

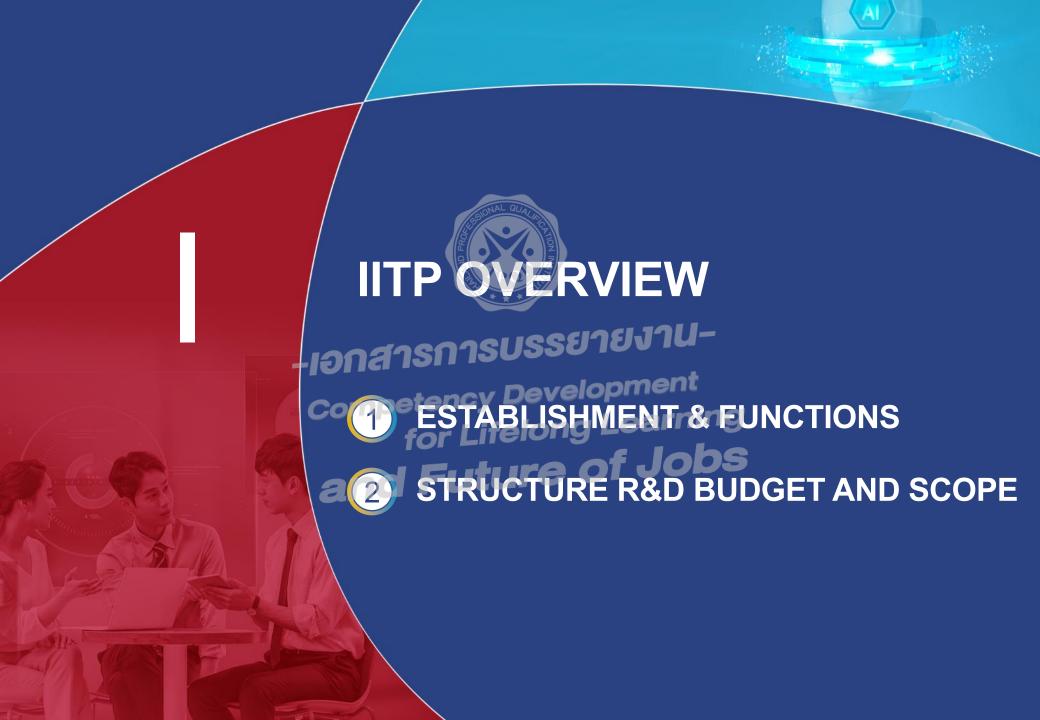


DIGITAL HRD STRATEGY



HRD COLLABORATIONS





ESTABLISHMENT & FUNCTIONS

PURPOSE / HISTORY

TECHNOLOGY and INDUSTRY PROMOTION through ICT R&D

Article 32 Special Act on Promotion of IcT and Promotion of Convergence



Institute for IcT **Promotion**

Unification of Korea's IT R&D Functions to IITP (NIPA, KCA, KEIT, KIAT, KOCCA)



Name Change Due to INCREASE in Scale and Roles

FUNCTIONS Learning

FULL CYCLE of ICT R&D: Policy / Tech. Planning, Management, Evaluation, and Implementation



- Policy Research
- Research Analysis
- Trend Analysis



- Tech Forecast
- Competency Survey
- Tech Roadmap





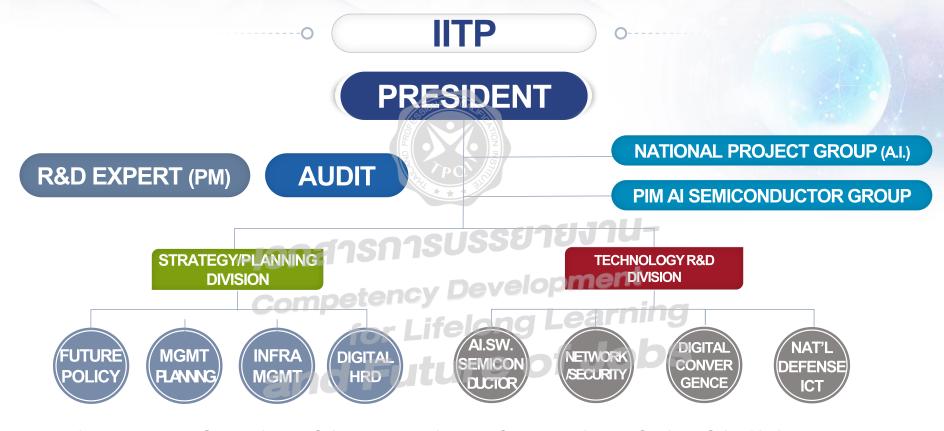


- Progress MGMT
- R&D Funding / Adjust



- Tech Transfer
- Commercialization

02 · STRUCTURE



* Project Manager : ① Digital Society, ② Communications/Network, ③ Broadcast Satellite, ④ Al/data, ⑤ SW / Self-Driving, ⑥ Media/Contents, ⑦ Security/Blockchain, ⑧ Semiconductor/Quantum, ⑨ ICT

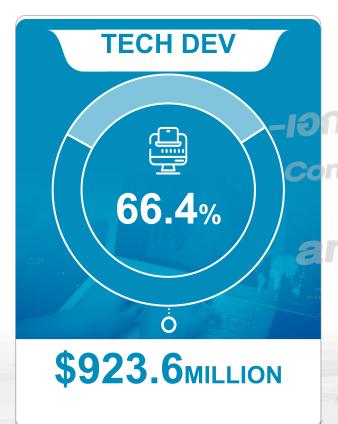
390 Employees

02 • BUDGET (2023) (1) R&D TYPE

BUDGET BY SECTOR

\$1.39BILLION USD

* AVG 12% ANNUAL INCREASE (2020) \$1.02B \rightarrow (2021) \$1.16B \rightarrow (2022) \$1.32B

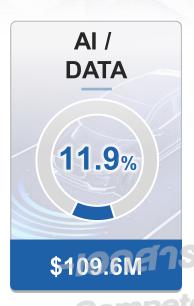






02 • BUDGET (2023) (2) TECH TYPE



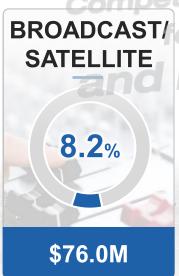


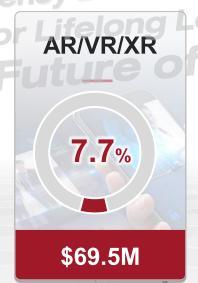


















01 - WORLD IS DIGITALIZING (1)

MS, Nvidia, Apple, Alphabet(Google), Amazon = 30% of S&P500

2009 Market Capitalization

| NO. | COMPANY | TYPE | | |
|-----|------------------------------|------------|--|--|
| 1 | PetroChina (CN) | Oil | | |
| 2 | Exxonmobil (US) | Oil | | |
| 3 | Microsoft (US) | Competency | | |
| 4 | Bank of China (CN) | Finance | | |
| 5 | Walmart (US) | Retail | | |
| 6 | China Construction Bank (CN) | Finance | | |
| 7 | BHP Group (AU) | Resource | | |
| 8 | HSBC Holdings (EN) Finance | | | |
| 9 | Petrobras (BR) | Oil | | |
| 10 | Alphabet (US) | IT | | |

2024 Market Capitalization

| NO. | COMPANY | TYPE | | |
|------|-------------------------|---------------------------|--|--|
| SIJ' | Microsoft (US) | SW, Cloud, Al | | |
| 2 | Nvidia (US) | GPU, AI | | |
| 3 | Apple (US) | iDevice, AppStore, Al | | |
| 149 | Alphabet (US) | Search, Cloud, Mobile, Al | | |
| 5 | Amazon (US) | E-Commerce, Cloud, Al | | |
| 6 | Aramco (SA) | Oil and Gas | | |
| 7 | Meta Platforms (US) | SNS, VR/AR, AI | | |
| 8 | TSMC (TW) | Semiconductor for Al | | |
| 9 | Berkshire Hathaway (US) | Investment | | |
| 10 | Eli Lilly (US) | Pharmaceutical | | |

01 - WORLD IS DIGITALIZING (2)

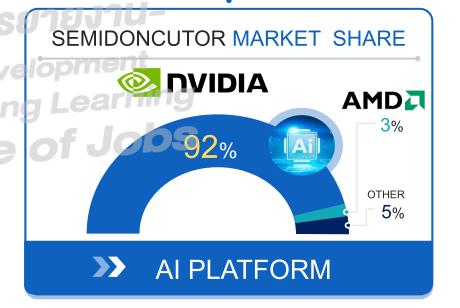
TREND

1% OF FOCUSED INNOVATION DRIVES DIGITAL COMPETITION

TIME UNTIL 100M USERS Google 8Y YouTube 2Y 10M 9 OpenAl 2MONTHS

ARTIFICIAL INTELLIGENCE

SEMICONDUCTOR



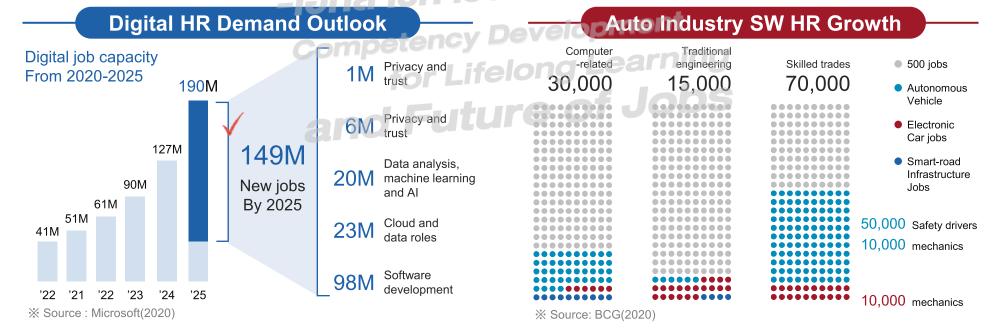
WORLD IS DIGITALIZING (3)

Global Digital Workforce Demand Outlook

- ✓ Within 5 years, 150 million digital jobs are expected to be created (Microsoft, 2020)
 - Software Development (65.8%), Cloud/Data (15.4\$), Data Analytics and AI (13.4%)
- ✓ Within 10 years, US auto industry will create 115,000 new jobs, with 230,000 (26.1%) are computer/software-related graduates outnumbering traditional engineering

HYUNDAI: Expand SW and Invest \$10B by 2030, **VW**: Employee 10,000 SW specialists by 2025

GM : Employ 7,000 SW specialists by 2022



01 • WORLD IS DIGITALIZING (4)

PLAN FOR SECURING DIGITAL TALENT

Digital Transformation relies on ACQUISITION OF TALENTS WITH SOLID FOUNDATION

Biggest Challenges of CEOs in Digital Transformation



HRD is the core of Science and Tech



[US] Legislation to restore global leadership

Invest \$200B in Al/Semiconductor HR, establish Tech Innovation Bureau (Semiconductor Science Act 2022)



[CN] Digital Talent Development Policies

Attract high-quality foreigners (10,000 Talents Plan 2008~), and foster 10,000 specialists (2012~)



[EU] Digital Transformation Compass (Blueprint)

20 million IT professionals by 2030 (currently 7.8M), at Least 80% of adults have basic digital skills

X Source: Deloitte (2021),

02 - KOREAN DIGITAL HRD (1)

LOW NO. OF **STUDENT**

Low population leads to re-allocation, re-education of students and curriculum Competency Developme

DIRE **SITUATION**



In-house training to resolve qualitative mismatch

TECH COMPETITION

Securing innovative talent is key to technological survival

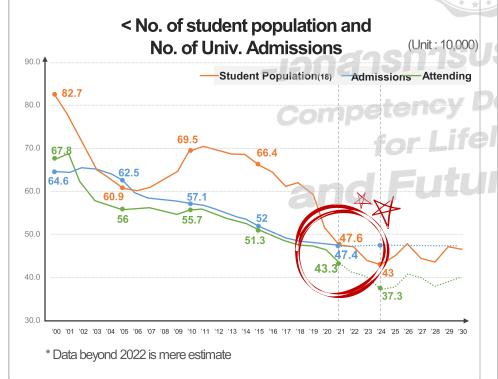
SW-AI SHORTAGE

Non-IT companies' exponential Demand surge in SW/AI workforce

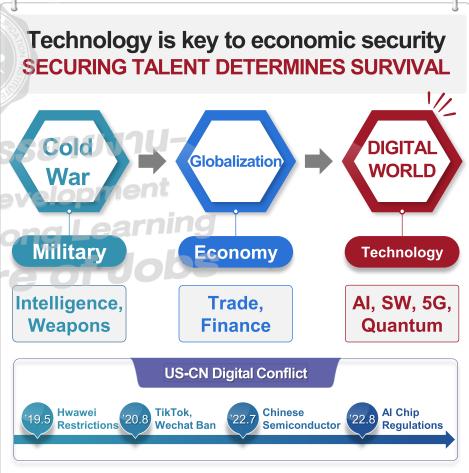
02 - KOREAN DIGITAL HRD (2)

1. LOW NO. OF STUDENT

Decrease in student population LIMITS DIGITAL WORKFORCE



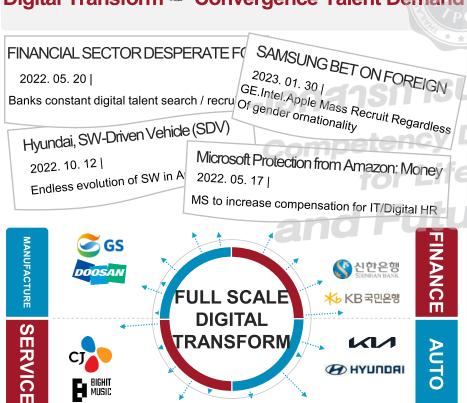
2. TECH COMPETITION



02 - KOREAN DIGITAL HRD (3)

3. SW-AI SHORTAGE

IT / non-IT(Manufacturing, finance, etc.) Accelerated
Digital Transform Convergence Talent Demand



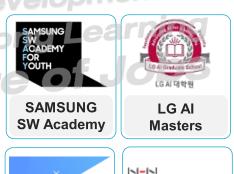
4. HR SHORTAGE

of workforce supply vs demand
Companies push for RE-training















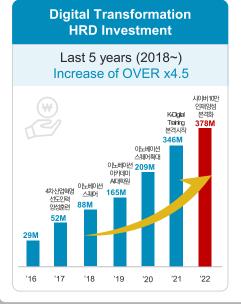
03 • GOVERNMENT DUTY (1)

GOVERNMENT

- Government is drastically INCREASING INVESTMENT in accordance of digital transformation
- ✓ In order to supplement the limitations of HRD DIGITAL TALENT DEVELOPMENT MEASURES are being prepared

| 2018.03 | 2019.12 | 2020.07 | 2021.04 | 2021.06 | 2022.08 |
|---------------|----------|-----------------|-------------|----------------|----------------|
| | | | | | |
| Compulsory | Nat'l Al | 100,000 AI/SW | BIG3+AI | Public-Private | Digital Talent |
| SW Elementary | Strategy | Talent Strategy | HR Strategy | SW Talent | HRD Plan |

Government Investment



New Projects for Digital Talent

- Innovation Academy, Al Graduate School, Global Talent
- Al Competency Mentorship, ICT innovation Talent 4.0
- Al-Centered Convergence, Al Innovation Hub
- Metaverse Graduate School, Global HRD Training, Corporate SW Camp, SW Professional, National Defense Al
- Al Semiconductor Talent

PRIVATE SECTOR

- ✓ Drastic Salary Increase and Welfare Improvements to attract the best Digital Workforce
- Digital Workforce In-House Training Program

Private Sector Digital HRD

| Company | Program | Features | |
|-------------------|-----------------------------|---|--|
| SAMSUNG | SSAFY | 1 year program for those under 29 (Coding Education for Basic and Advanced) | |
| SK | SK Hynix Youth High Five | 4 week program for those under 34 (Job Training and Specialized Training) | |
| Crafton +KAIST | SW Academy (Jungle) | 5 month course for those under 34 (Science & Engineering intensive training) | |
| NHN | NHN Academcy | 7 month course for those under 34 | |
| Naver (Line) | Boostcamp | 5 Month Immersive Education | |
| KT | KT Alive School | 5.5 Month Program with 2 Tracks | |
| LG | Aimers | 2 month online program for unemployed 19 ~29 regardless of major (Al Training, Hackathon) | |

03 - GOVERNMENT DUTY (2)

GRADUATE SCHOOL

IT Research Center (2000~), Regional Innovation (2016~)
IT Graduate Level Research Competency Development

- ✓ 2017~2021 Korea's 15%(4,467) of Graduates are IT
- ✓ 2017~2021 Case of 2,133 SCI, 2,390 Patents, Tech Fee \$28.2M
- ✓ 12 case of OUTSTANDING research in the last 5 years (2018~2022)

 And cemented as Nation's Most Important HRD Program

Facilitate Faculty and Talents

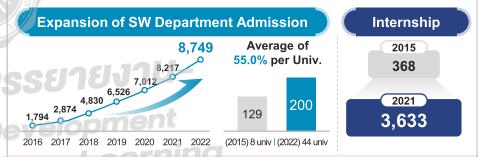
Through Al Graduate School ('19), Al Hub ('21)



UNVERSITY SW EDUCATION

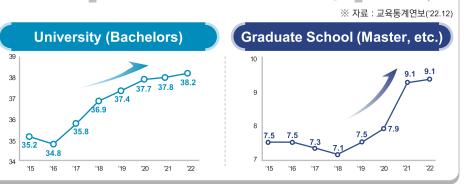
Transform Education through SW Universities (2015~)

Encourage Education reforms and curriculum change, including SW related admissions, adjust to industry standard, etc.



Change in perception of once unpopular IT Major

Univ. Grad. Admission to ICT Department



03 - GOVERNMENT DUTY (3)

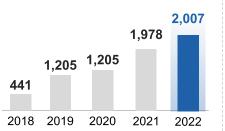
CREATIVE/INNOVATIVE TALENT

Discover / Nuture SW talents and Foster / Strengthen Entrepreneurial Competency

✓ (SW Maestro, 2010~) Intensive expert mentoring and in-depth training
Annually 250 experts output

SW Maestro Applicant

Employment> 93.2% | Last 3 years



SW Maestro Entrepreneur

129 companies established with 1,217 employed (avg 7.6 staff)



SW Maestro Case

✓ Startup Company 'Dr. Tail' awarded CES2022 Innovation Award (out of 2,200 companies, 89 Korean companies awarded)

머니투데이

美 온라인 수의사 서비스 '닥터테일', CES 2022 혁신상



2017 SW Maestro 8th Gen Graduate

19.7 Cumulative Startup Founders

20.2 Funding awarded to Graduates

- Funding: \$84K in growth Subsidies
- KR/US patents for global software

JOB COMPETENCY IN SW

Strengthen Practical SW Competency through self-learning, company-linked education

(Innovation Academy, 2019~) NO professor, textbook, tuition program self-driven learning (600 trainee annual)

Employment (2022)

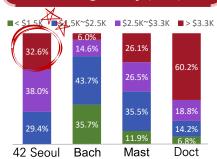
66.4% 66.4%

ng Lea

64.1%

Total Sciene ICT 42 Seoul

Starting Salary (2022)



Innovation Academy Case

✓ IT Major ratio is lowest (37.7%) among HRD projects, but has highest employment rate



○○○ / Int't Trade Major

Job : AIMMO Data Engineer

As a liberal arts majoring student, I wanted to become a developer in data. I learned the overall development through 42 Seoul, and successfully got the job in my dream data center

I was able to get a job in this technological field due to the self-driven learning skill acquired and guidance provided by Seoul42

ooo / English Major

Job : Hyundai BigData Engineer

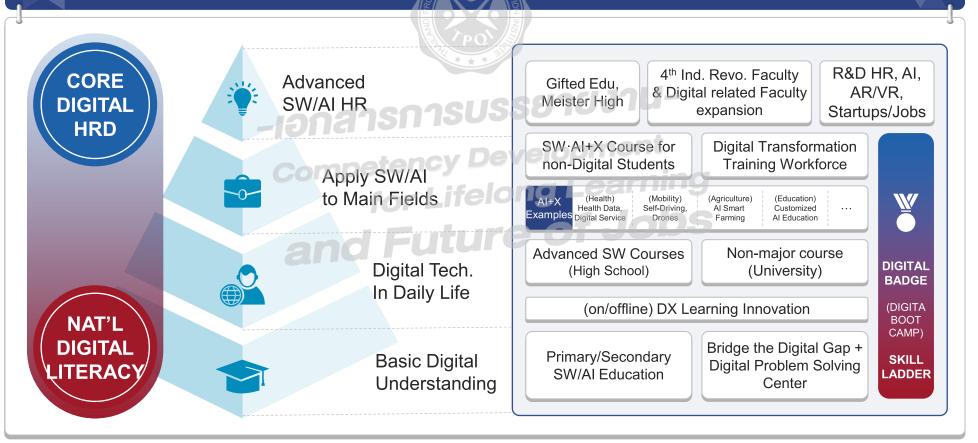




01 - PRESIDENT'S OBJECTIVE

1 MILLION DIGITAL HRD (2022~2026)

DYNAMIC INNOVATION GROWTH THROUGH DIGITAL HR



02 - MINISTRY STRATEGY

VISION

INNOVATIVE DIGITAL HRD FOR A DIGITAL ECONOMY

4 STRATEGIES









MAIN PROJECTS

1. COMBINE EFFORTS OF PUBLIC AND PRIVATE

- Rapid Growth in Digital HR for the Industry
- Expand Advanced Education for Potential HR Competency
- 3 Regional Digital Education for Rural Digital HRD
- More DX HRD for Digitalizing Industries

2. TRANSFORM UNIV. TO ADVANCED TRAINING

- Top-Tier HRD to Lead Tomorrow's Advanced Technology
- Pull-Scale University Digital Education Transformation
- Attract Competent Faculty & Implement Fast-Learning Track

3. DIGITAL COMPETENCIES FOR THE FUTURE

- Digital Curriculum in Primary, Secondary Education
- Build Digital Competencies Early and Provide HR to Industries
- Customized Digital Training for Military Service

4. ESTABLISH FULL-CYCLE HRD SUPPORT

- ♠ SKILLS LADDER for Competency Validation/Growth/Career
- Promote Data-backed HR Policy-making

1-1

RAPID GROWTH IN DIGITAL HR FOR INDUSTRY

ESTABLISH NEW INDUSTRY-LED PUBLIC/PRIVATE CURRICULUM

1

IND.-UNIV. COLLABORATION

CAMPUS SW ACADEMY

Digital Training by Corporation Within University Campus

kakao enterprise



TmaxSoft

IND.-UNIV.-GOVT. COLLAB

NETWORK CAMPUS SW ACAD.

Industry-level Advanced Training
For Each Region



HANCOM HAMDS 3

SME JOINT TRAINING/RECRUIT

CORPORATE MEMBER SW CAMP

SME/Association Consortium For Training/Recruitment of Graduates







QUICK EXPANSION OF JOINT INDUSTRY HRD

SOLVE INDUSTRY MANPOWER SHORTAGE
DIGITAL HR ALLIANCE

SUPPORT IN-HOUSE CORPORATE TRAINING
DIGITAL LEADERS CLUB

1_2 EXPAND ADVANCED HRD

1-3

REGIONAL DIGITAL HRD

TRAINING OPPORTUNITY FOR YOUTH

SPECIALIZED CORPORATE TRAINING IN CLUSTERS

DIGITAL TECH. BOOTCAMP TRAINING

REGIONAL DIGITAL INNOVATION BASE

1-4

MORE DX HRD FOR DIGITALIZING INDUSTRIES

CONSULTING

Digital Transformation of Experts Program (2024~)

VOUCHER

-เอกสารการบรรยายงาน-

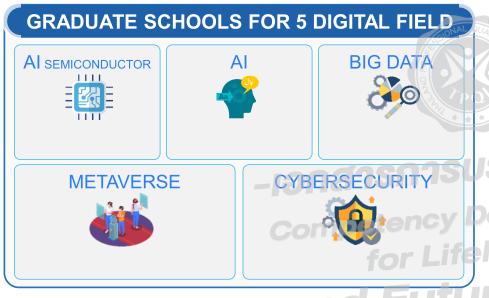
Vouchers for SME
(45 Companies, 2023~)

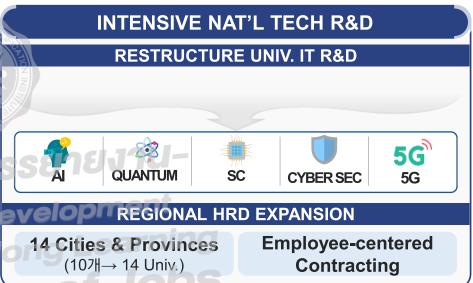
WORKFORCE TRAINING

DX Training for non-Digital Industries (i.e. Finance, Services) (4,800HR, 2022)

2-1

TOP-TIER HRD TO LEAD TOMORROW'S ADVANCED TECH.





GROWTH THROUGH HIGH-LEVEL ADVANCED R&D HR

AI INNOVATION HUB

- 215 Industry-Academia-Research
- Increase Young Researchers

SW STAR LAB

- Support Core SW Source Tech.
- Support Qualified HRD Labs
 39 Labs, 2023 → 60 labs by 2027

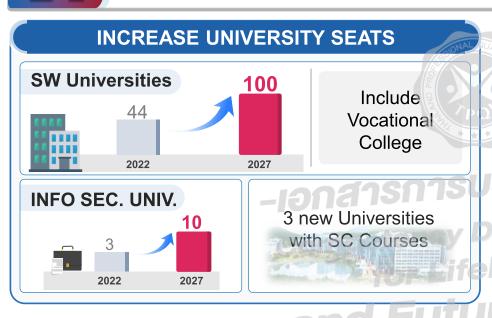
GLOBAL CORE TALENT

- Master's and Doctoral Students
- CMU, UT AI R&D

66 Students, 2022

2-2

FULL-SCALE UNIV. DIGITAL EDU. TRANSFORMATION









SUPPORT GROWTH IN OTHER DEPARTMENTS

Increase Digital Courses 332 (2022) → 450 Courses (2027) Basic Digital Education/Training
For all Students

Credit recognition for lectures in other universities

2-3

ATTRACT COMPETENT FACULTY & IMPLEMENT FAST LEARNING

INFLUX OF INDUSTRY SPECIALISTS

"Intelligent Information Act expands scope of regulation for concurrent faculty employment

Level 1

MSIT Project (2023)



Level 2

ALL univ. Gov't Projects

Qualified Faculty and Lecturer Pool(2023~)

ACQUIRE GLOBAL EXPERTS

BRAIN POOL + SUPPORT

* \$447K USD to attract foreign Researchers

Recruitment of qualified foreign faculty for domestic university positions(MOE)

* Civil Servants Act Amendment (Mar. 2021)

FAST LEARNING TRACKOOS

Program Package (3.5+1.5 years)

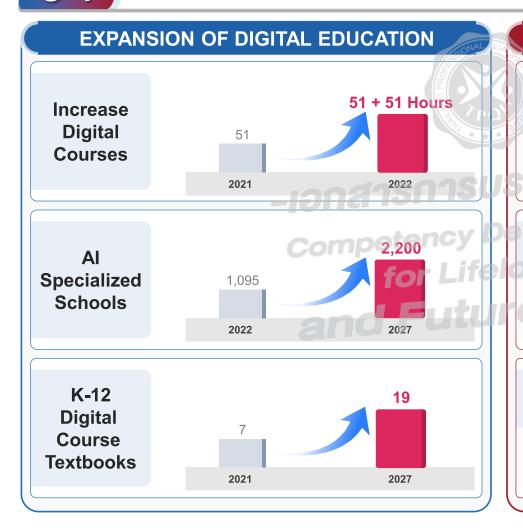
*SW University(3.5years) + Al Graduate School(1.5year년)

Proliferation of 1 –year Micro-Degree

*(ex.) KAIST STEM Graduate (2022)

3-1

DIGITAL CURRICULUM IN PRIMARY, SECONDARY EDU.



INCREASE QUALIFIED TEACHERS

Assign 1 Digital Expert as Teacher in all Schools

Survey Teacher Demand By 2023 Teacher Supply/Demand Plan By 2024



Train Digital Tutors(770 per year)

Assigned as Assistant Teachers in Schools



Al School Teacher Training

IT Companies provide Education & Training

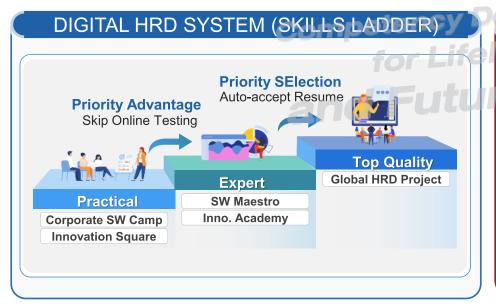


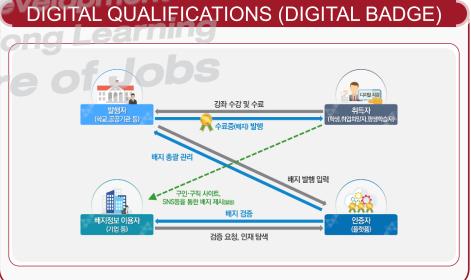
3-2

BUILD DIGITAL COMPETENICES EARLY AND FEE INDUSTRIES

SW Gifted 70 40 122년 2025







3-3

MILITARY DIGITAL TRAINING





Compulsory Training on New Digital Technology
Provide Al Graduate School Mentors and assist Al Missions

Military Al Specialist



4-1

CUSTOMIZED HR EVALUATION THROUGH TOPCIT

Enhanced Digital Competency Evaluation for each Speicalty

- »FIND your talent within
- » RECRUIT new talent
- » UTILIZE PLATFORM for Customized evaluation
- » ACESS free online learning materials





01 · IITP HRD Collaboration



(\$285.9M USD) \$128.0M R&D \$157.9M Non-R&D **★ IITP COLLAB Bachelors** Graduate **High School** \$127.1M \$7.1M \$119.7M \$32.0M Global R&D Vocational **Practical** Univ. IT Research Center 32.7M **SW University** Global Competency Project 3.3M **SW Meister High** 2.0M 69.0M **Regional Innovatio** 19.6M EDUCATION/TRAINING **Global ICT Talent 1.7M** ICT Credit Internship 2.4M HIGH Speed IT HRD 5.1M **Al Graduate School** 16.7M Graduate Level Training Early SW Talent University SW Education Convergence Security 5.6M IT Talent Development 5.0M IT Innovation 4.0 Al Semiconductor HR 3.7M 7.1M K-SW Square 0.3M Al Innovation Research 8.3M Innovation Education US R&D Co-op SW Starlab 9.6M Al Convergence Innovatio 8.8M Metaverse Graduate 2.9M Al Semiconductor Talent 3.5M Graduate Level R&D Innovation Academy (27.6M) ນefense SW/Al Training 3.0M SW Maestro Course 10.8M

SPECIAL

Innovation Academy 27.6M

SW Professional 14.1M

Corporate SW Camp 10.3M

Private Sector / Unemployed Support

Test of Practical Competency in IT (TOPCIT) 2.1M

Industry Maestro Course 10.8M

SW Maestro Course 10.8M

ICT Mentoring 5.1M

Industry Mentorship

IT Talent Foundation 0.5M Talent Outlook

02 • TOPCIT (1)

CUSTOMIZED HR EVALUATION THROUGH TOPCIT

Enhanced Digital Competency Evaluation for each Specialty

- »FIND your talent within
- » RECRUIT new talent
- >> UTILIZE PLATFORM for Customized evaluation
- » ACESS free online learning materials



FUNCTIONS OF TOPCIT

Improve IT/SW education, resolve IT manpower shortage, and expand individual's growth potential



- ▶ TRACK HR DEMAND
- Specialized IBT System

Problem Solving Skills

Practical IT Competence

Real Life Test Examples

Al Algorithm Based Question

TOPCIT UTILIZATION

STUDENTS



- Career guidance
- Self-driven learning
- IT Industry Trend

UNIVERSITY



- More IT Curriculum
- Constant Update
- Industry Demand
- Students' Level

INDUSTRY



- Discover IT Talent
- Better HR Allocation
- Save HRD Costs

02 • TOPCIT (2)

Question Type

Multiple Choice (19%) + Short Answer (12%) + Long Answer (21%) + Critical Thinking (48%)

* Total of 65 Questions for 2 hours and 30 minutes



- IT Business & Ethics (9%)
- Project Management & Technical Comm. (8%)



- **Software** (26%)
- Data (15%)
- System Architecture (8%)
- Information Security (9%)

- 33 -



 Knowledge & problem solving skills in both Technology & Business (26%)

02 • TOPCIT (3)

SOFTWARE

- Understanding Software Basics
- Data structure and algorithm
- Software analysis and design
- Software implementation and testing
- Software management
- Trends in software development

DATA

- Understanding of data and databases
- Database design
- Database programming
- Database operations
- Data analysis and application

SYSTEM ARCH.

- Overview of systems architecture
- System-based technologies
- Application technologies of systems
- architecture
- Network-based technologies
- Application technologies of networks



INFORMATION SEC.

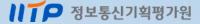
- Understanding of information
- security
 - Practice of information security

IT BUSINESS/ ETHICS

- Understanding of IT business
- Planning IT business
- Execution of IT business
- Trends in IT business
- Ethics of IT busines

PM and TECH. COMM.

- Business communication
- Technical communication
- Presentation
- Understanding / mgmt. of projects
- PM Scope, tools and evaluation



JOIN KOREA NOW IN HRD DIGITAL TRANSFORMATION

T-HANK YOU

