2017 CIO Agenda: A South Korean Region Perspective

Published: 26 April 2017  ID: G00328341

Analyst(s): Andrew H Kim, Youn Choi, Elizabeth Kim

The Gartner 2017 CIO Survey shows that top-performing CIOs seize their ecosystem opportunities with a development focus centered on IT leadership, IT organization and technology capabilities. We provide a South Korean region perspective, highlighting where South Korean CIOs differ from their peers.

Key Findings

■ Forty-five percent of South Korean CIOs who participated in the survey reported their enterprises are part of a digital ecosystem, with the majority maximizing business value by co-creating or providing it.

■ Among survey respondents, South Korean CIOs are expected to support more revenue growth with lower IT budget increases than overall top performing peers.

■ South Korean CIOs feel challenged by funding, followed by skills/resources. These are major barriers to new technology initiatives and digital business efforts in their organizations.

■ Advanced analytics, Internet of Things (IoT) and machine learning rank as the top technology areas that South Korean CIO respondents think have the greatest potential to underpin digital transformation and strategic change.

Recommendations

South Korean CIOs establishing and mastering digital business success should:

■ Mine greater value by taking a more strategic role or expanding digital ecosystem membership and service depth and breadth. Those not already part of an ecosystem should consider membership and prepare accordingly.

■ Explore more options to invest in and/or buy startups, or engage them as suppliers to add immediate value to their digital plans.

■ Bring digital risk and security to the forefront of business decision making to transform relationships and perception with internal and external C-level peers.
Assess your current IT security strategy, and evaluate an improvement opportunity for shifting from silo-based to risk-based decision making.

Embrace a cloud-first strategy, and invest in the skills and technologies to integrate public cloud services.

Table of Contents

Survey Objective ........................................................................................................................................... 3
Data Insights ................................................................................................................................................. 3

Forty-Five Percent of South Korean CIOs Participate in a Digital Ecosystem ........................................ 4
Expectation of Outcomes From Digital Initiatives to Focus on Digital Channels and More Revenue ..... 6
South Korean CIOs Are Investing in Business Intelligence and Analytics Technologies ................. 8
South Korean CIOs Expect a Small Increase in IT Budgets in 2017 .................................................... 11
Funding and Skills Remain Challenging .................................................................................................. 16
In South Korea, In-House Sourcing of Critical Digital Components Is Uncommon ............................ 19
South Korean CIOs’ Stakeholders Are Only Moderately Satisfied With IT’s Performance .............. 21
Methodology ............................................................................................................................................... 22
Gartner Recommended Reading .............................................................................................................. 22

List of Figures

Figure 1. Participation in Digital Ecosystems ......................................................................................... 5
Figure 2. Activities in Digital Business Ecosystems .............................................................................. 6
Figure 3. Expected Business Outcomes From Digital Initiatives ......................................................... 7
Figure 4. IT Budget Spend on Digitalization Is Increasing .................................................................. 8
Figure 5. Technology Investment Priorities ........................................................................................... 9
Figure 6. Security Principles of Trust and Resilience .......................................................................... 10
Figure 7. Digital Technologies With the Highest Potential to Change the Game ................................ 11
Figure 8. Average Budget Change ....................................................................................................... 12
Figure 9. Driving IT Cost-Efficiencies .................................................................................................. 13
Figure 10. IT Spending Categories ........................................................................................................ 14
Figure 11. Leaders Prioritize Value Over Cost .................................................................................... 15
Figure 12. CIOs’ Biggest Barriers to Success in 2017 ....................................................................... 16
Figure 13. Biggest Talent Gaps Cited by South Korean CIOs .............................................................. 17
Figure 14. Biggest Talent Gaps ............................................................................................................. 18
Survey Objective

Every year, Gartner surveys CIOs and IT executives drawn from the membership of its executive program and other sources to identify key priorities, opportunities and issues.

Thirty-one CIOs from South Korea responded to the 2017 Gartner CIO Survey out of the overall total of 2,598 respondents. Although this is a relatively small sample size, this research is still able to look into the specific areas where South Korean respondents have differing views when compared to their global peers.

Data Insights

The 2017 Gartner CIO Agenda presented a global proposition that as digitalization matures, more enterprises join digital ecosystems. This raises technology, organizational and leadership challenges for CIOs. Many will need to shift their enterprise from a linear-value-chain business, to being part of a faster and more dynamic networked digital ecosystem. The key question for CIOs to answer is what priorities they should set for their 2017 leadership agenda to seize the digital ecosystem opportunity.

To provide a more powerful context and a glimpse into the future (since we believe that what a top-performing enterprise does today, most other enterprises will do tomorrow), the 2017 CIO Agenda divides survey respondents into three categories based on self-reported IT and enterprise performance:

- **Top performers** — A self-reported score of 6 or 7 (out of 7) to the question, "How effective is your company at factoring digital considerations into strategy and planning?" These performers answered "scaling or harvesting" (the top two categories) to the question, "Which of these best describes the stage of your organization’s digital initiative?"

- **Typical performers** — The cohort that performed too well to be included in trailing performers, yet not well enough to be included in top performers.

- **Trailing performers** — A self-reported score of 1 or 2 (out of 7) to the question, "How effective is your company at factoring digital considerations into strategy and planning?" These performers answered "none or desired" (the bottom two categories) to the question, "Which of these best describes the stage of your organization’s digital initiative?"

Three key characteristics distinguish top performers from the rest of the field when it comes to ecosystem participation. Top performing organizations:

- Focus technology planning on interoperability
- Build organizational bench strength armed with an external mindset
- Center leadership practices on mastering interdependence

Throughout this report, we contrast South Korean CIOs’ responses to these three characteristics to discuss their contrasting position with the global results.

An analysis of the survey responses from South Korean CIOs reveals one big key theme: **In many areas, South Korean CIOs are closely aligned with the overall typical performers in this survey.** There are differences, however, between South Korean CIOs and overall top performers in their approach to digital, and these have been highlighted in this analysis. Many South Korean CIOs that responded to this survey have similar vision and strategy as global leaders, but often operate under unique constraints. Thus, it is a challenging environment for South Korean CIOs because the expectation is for them to perform like global leaders, but within the constraints of only a moderate increase in IT spending, a significant increase in organizational revenue expectation and an overall lack of skills in all areas. Therefore, the remainder of this report focuses on identifying how South Korean CIOs from the survey sample stack up against leading performers, calling out differences and providing recommendations for success.

**Forty-Five Percent of South Korean CIOs Participate in a Digital Ecosystem**

As analyzed in the parent document in this series (see "2017 CIO Agenda: Global Perspectives on Seizing the Digital Ecosystem Opportunity" for the in-depth collection of research), enterprises in 2017 need to make the shift from being a linear-value-chain business, to being part of a faster and more dynamic networked digital ecosystem.

**Definition:** A digital ecosystem is an interdependent group of actors (enterprises, people and things) sharing standardized digital platforms to achieve a mutually beneficial purpose.

Digital ecosystems are underpinned by standards-based digital platforms that focus innovation on the customer experience and the business model, allowing for rapid experimentation and change. Given the restless nature of digital ecosystems, CIOs need to factor them into their planning for the future.

As organizations seek digital maturity, CIOs as digital leaders need to drive their participation in an expanded ecosystem that includes competitors, customers, regulators and other stakeholders.

Figure 1 shows, South Korean enterprises, like their global peers, are slightly less than typical performers to be operating as part of a digital ecosystem (a collection of suppliers, customers and other participants bound together by electronic networks). Forty-five percent of South Korean CIOs report they are part of a digital ecosystem. Of that forty-five percent, 64% report running it (co-creating or providing), which is shown in Figure 2.
Figure 2 shows South Korean businesses are slightly more likely than their global peers to run their products and services through the digital ecosystems they are the part of; however, these are likely to be owned and operated by someone else, as the slight smaller proportion of South Korean businesses that run their own digital ecosystem attests. Generally, an organization selling through someone else’s ecosystem risks giving up business value to that other party, since they get to control terms and conditions, can preferentially sell their own products and commonly charge a toll for others to participate.
Figure 2. Activities in Digital Business Ecosystems

Call to Action:

South Korean CIOs already part of a digital ecosystem should:

- Continue creating more interactions (buying/selling within the ecosystem and running an ecosystem).

Those not a part of a digital ecosystem should:

- Begin to prepare for future participation by systematically building up capabilities in technology, organizational and IT leadership (see “The 2017 CIO Agenda: Seize the Digital Ecosystem Opportunity”).

Expectation of Outcomes From Digital Initiatives to Focus on Digital Channels and More Revenue

Business priorities are evolving to support a shift toward more IT spending on digital initiatives — a greater proportion of business through digital channels was the most commonly cited business outcome and/or impact of digital initiatives for South Korean CIOs in 2016 and 2017. Generating more revenue/customer/citizen value through superior operations and improving/automating current
operations initiatives were the second and third most important priority (see Figure 3). These top three responses from South Korean CIOs broadly align with global top performers.

South Korean CIOs expect increased spend on digitalization. These are built on foundations of fully integrated business and technology streams, business sponsorship for technology projects and digital products, and full technology spend transparency. However, compared with both top performers and typical performers, South Korean CIOs are behind the overall average on investment and focus on digitalization. Both now and in their projections for 2018, South Korean CIOs expect less investment as a percentage of total IT spend versus global peers, that is, top and typical performers (see Figure 4).
Figure 4. IT Budget Spend on Digitalization Is Increasing

Average (Mean) Percentage of IT Budget Spent on Digitalization

<table>
<thead>
<tr>
<th>South Korea (n = 31)</th>
<th>Top Performers (n = 135)</th>
<th>Typical Performers (n = 1,427)</th>
<th>Trailing Performers (n = 103)</th>
</tr>
</thead>
<tbody>
<tr>
<td>28%</td>
<td>43%</td>
<td>28%</td>
<td>16%</td>
</tr>
<tr>
<td>17%</td>
<td>33%</td>
<td>18%</td>
<td>7%</td>
</tr>
</tbody>
</table>

Approximately what percentage of your IT budget is spent on digitalization (capital plus operations, but excluding depreciation)?
By 2018, approximately what percentage of your IT budget will be spent on digitalization (capital plus operations, but excluding depreciation)?
Base: Excludes "Don't know."

Source: Gartner (April 2017)

Call to Action:

South Korean CIOs should:

- Review current digital initiatives — more digital channels, more revenue/values, and improving/automating current operation — and assess how these initiatives can impact the business outcome perspective. Assess how to best shift operational spending patterns across multiyear budgets to achieve digital business objectives.
- Invest more in R&D, and focus these efforts on building or leveraging digital ecosystems and platforms that can drive new products and services.
- Inform and educate business executives on evolving differences between traditional IT and digital business cases.

South Korean CIOs Are Investing in Business Intelligence and Analytics Technologies

Digital business is built on a digital business technology platform. As shown in Figure 5, 61% of respondents from South Korea say that they are investing new or discretionary funds in business intelligence and analytics as a top priority.
The next top technology investments are mobility/mobility applications, followed by cyber/information security and then cloud services/solutions. This implies that South Korean CIOs are delivering digitalization demands with the business intelligence/analytics/mobile application/cloud as digital initiative enablement platform.

Figure 5. Technology Investment Priorities

<table>
<thead>
<tr>
<th>Technology Areas That Were Mentioned Within Top Three by More Than 10% of Overall Respondents</th>
<th>South Korea (n = 31)</th>
<th>Top Performers (n = 178)</th>
<th>Typical Performers (n = 2,165)</th>
<th>Trailing Performers (n = 171)</th>
</tr>
</thead>
<tbody>
<tr>
<td>BI/Analytics</td>
<td>61% (1)</td>
<td>47%</td>
<td>38%</td>
<td>31%</td>
</tr>
<tr>
<td>Mobility and Mobile Applications</td>
<td>32% (2)</td>
<td>16%</td>
<td>14%</td>
<td>16%</td>
</tr>
<tr>
<td>Cyber/Information Security</td>
<td>26% (3)</td>
<td>13%</td>
<td>16%</td>
<td>20%</td>
</tr>
<tr>
<td>Cloud Services/Solutions</td>
<td>19% (4)</td>
<td>34%</td>
<td>25%</td>
<td>29%</td>
</tr>
<tr>
<td>Enterprise Resource Planning</td>
<td>13% (5)</td>
<td>8%</td>
<td>22%</td>
<td>30%</td>
</tr>
<tr>
<td>Networking, Voice and Data Comms.</td>
<td>10% (8)</td>
<td>8%</td>
<td>12%</td>
<td>13%</td>
</tr>
<tr>
<td>Infrastructure and Data Center</td>
<td>3% (10)</td>
<td>20%</td>
<td>22%</td>
<td>27%</td>
</tr>
<tr>
<td>Digitalization/Digital Mktg.</td>
<td>6% (14)</td>
<td>20%</td>
<td>17%</td>
<td>8%</td>
</tr>
</tbody>
</table>

Percentage of Respondents

Please indicate the top three technology areas where your company/business unit/government or public entity will be spending the highest amount of new/discretionary funding in 2018.

Up to three responses allowed.
Coded open-text responses.

© 2017 Gartner, Inc.

Gartner generally sees that compared to other regions, many organizations in South Korea still take a siloed approach to security. Based on much of the interaction Gartner has with South Korean organizations, much of security investments are heavily driven by check box compliance, and a vast majority of spending and efforts are focused on preventive security. While it is good news that more organizations in South Korea are focusing more on security and increasing their investment around security (see "Forecast: Information Security, Worldwide, 2014-2020, 4Q16 Update"), they need to have the right strategy and approach before making any security investment. This means they need to stop focusing on check box compliance and shift to risk-based decision making. They also need to stop focusing efforts solely on prevention, and balance investments across protection, detection and response. These are only two of the six principles of resilience that organizations need to incorporate in their approach to security to address digital business risk and security (see "Use Six Principles of Resilience to Address Digital Business Risk and Security"). Security in digital business today is a balance between the risk of cyberthreats and the resilience the business demands from...
leveraging technology in pursuit of value. Figure 6 shows the security principles of trust and resilience.

![Figure 6. Security Principles of Trust and Resilience](source: Gartner (April 2017)](source: Gartner (April 2017))

The overall South Korean public cloud market will continuously increase, with an annual growth rate of 17.6% through 2021 (see "Forecast: Public Cloud Services, Worldwide, 2015-2021, 1Q17 Update"). Though South Korea is still not mature in cloud adoption, there are potential growth engines, including cloud initiatives by the government and transactions to a cloud environment in the enterprise segment. Demand from migration of infrastructure to the cloud and increasingly compute-intensive workloads, such as analytics, artificial intelligence (AI) and Internet of Things (IoT) in the enterprise and startup segments, will drive the strong growth of the infrastructure as a service (IaaS) and platform as a service (PaaS) markets. And as software vendors continue to shift investments from on-premises, license-based software to cloud-based offerings, enterprises will transit their business model to enable the broader cloud-based application in the software-as-a-service market.

Looking to the future, South Korean CIOs’ expectations are similar to their peers (see Figure 7). CIOs expect that advanced analytics, IoT and machine learning have the most potential to change their organization in the next five years. This highlights a tension that South Korean CIOs are facing today — they need to optimize and operate current core technologies, while acknowledging the impact of disruptive technologies such as advanced analytics, IoT and machine learning (as well as
augmented reality, and virtual customer assistants and other disruptive digital technologies that their peers see as disrupting the future).

**Figure 7. Digital Technologies With the Highest Potential to Change the Game**

<table>
<thead>
<tr>
<th>Technology</th>
<th>Potential</th>
<th>South Korea (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advanced Analytics</td>
<td>81%</td>
<td>77%</td>
</tr>
<tr>
<td>Internet of Things</td>
<td>48%</td>
<td>68%</td>
</tr>
<tr>
<td>Digital Security</td>
<td>43%</td>
<td>19%</td>
</tr>
<tr>
<td>Business Algorithms</td>
<td>40%</td>
<td>16%</td>
</tr>
<tr>
<td>Machine Learning</td>
<td>22%</td>
<td>32%</td>
</tr>
<tr>
<td>Virtual Customer Assistants</td>
<td>19%</td>
<td>23%</td>
</tr>
<tr>
<td>Augmented Reality</td>
<td>13%</td>
<td>23%</td>
</tr>
<tr>
<td>Blockchain</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>Autonomous Vehicles</td>
<td>7%</td>
<td>15%</td>
</tr>
<tr>
<td>Smart Robots</td>
<td>6%</td>
<td>10%</td>
</tr>
</tbody>
</table>

In your opinion, which three of these technologies have the most potential to change your organization over the next five years?
Percentage of respondents to select each technology in top three (n = 2,331)
Percentage of South Korean respondents (n = 31)

Source: Gartner (April 2017)

**Call to Action:**

South Korean CIOs should:

- Continue to explore and exploit opportunities of business intelligence and analytics.
- Continue with the build-out of the core platform to make it digital-ecosystem-ready.
- Evaluate whether your current IT security organizational structure and strategy are adequate for the increasing need for resilience.
- Start building a cloud-first strategy, and invest in the skills and technologies to integrate public cloud services.

**South Korean CIOs Expect a Small Increase in IT Budgets in 2017**

South Korean CIOs anticipate their IT budgets will increase an average 1.6% from 2016 to 2017, placing pressure on IT spend.
The economic uncertainty plaguing the South Korean economy is evident in CIOs' expectations for changes in their IT budgets from 2016 to 2017. Whereas, the rest of the world re-emerges from the global financial crisis, and IT budgets are expected to increase by an average of 2.2%, in South Korea, IT budgets are expected to increase by 1.6%, on average, as can be seen in Figure 8.

**Figure 8. Average Budget Change**

![Figure 8](image)

Given their local economic conditions, it is not surprising that 68% of South Korean CIOs are likely to face IT cost-reduction targets in their own right (see Figure 9). The figure also shows how much of their cost-reduction target South Korean CIOs have achieved. They have some way still to go at only 54% on average (see “Managing Cost Optimization”).
Budget constraints and necessary prioritization of investments in the IT core risks disenfranchising IT’s stakeholders. Figure 10 shows this is happening, to a degree. Business unit IT — spending that profit centers or overhead (operating expenditure) departments are accountable for, where the IT department is consulted as a subject-matter expert and there is two-way communication — is higher than elsewhere. This level of informal IT spend can be a threat to IT architecture and security, or an opportunity for IT-enabled innovation. In practice, it is likely to have elements of both.
CIOs should not view cost reduction as an end in itself, but as a means to optimize spend on commodity IT to free up resources and funding for areas that generate value and deliver innovation. From this perspective, South Korean CIOs are largely aligned with global top performers — when asked to choose between prioritizing value over costs, they most often chose value than cost. What is most interesting is that South Korean CIOs are more likely to choose "deliver innovation" than "run day-to-day IT services." Based on the three choices shown in Figure 11, one could say that South Korean CIOs surveyed for this report are as business- and innovation-focused as their global peers.
Call to Action:

South Korean CIOs should:

- Assess current IT budget/spending, and explore an opportunity for cost optimization (see "Ten Ideas for Business Cost Optimization in the Digital Age").
- Link their cost optimization objectives and metrics with the consequent increase in digital spending, to ensure that their modest budget increases can be focused more on driving revenue growth for their organization.
- A strategy of amnesty and engagement — where shadow and business unit IT projects are cataloged and, where appropriate, the IT organization provides limited but critical assistance —
is recommended. How South Korean IT leadership responds to the list of informal IT projects depends on how each case of informal funding is viewed. If it is seen as a security or architectural risk, then IT leaders should build support for tighter IT governance rules that discourage informal funding of IT. If it’s seen as a source of innovation and additional funds, IT leadership should attempt to engage and guide these investments to increase their chances of success.

- Examine opportunities to move funding from less value-creating areas, even habitual investment such as data center assets, to fund more value-creating areas such as the continued investment in digitalization.

Funding and Skills Remain Challenging

As Figure 12 shows, funding/budgets and skills/resources shortages are major challenges for South Korean businesses.

**Figure 12. CIOs’ Biggest Barriers to Success in 2017**

<table>
<thead>
<tr>
<th>Bar Category</th>
<th>Percentage of Respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Funding/budgets</td>
<td>23%</td>
</tr>
<tr>
<td>Skills/resources</td>
<td>20%</td>
</tr>
<tr>
<td>Culture/structure of organization</td>
<td>10%</td>
</tr>
<tr>
<td>IT-business alignment</td>
<td>10%</td>
</tr>
<tr>
<td>Technology challenges (legacy, security, for example)</td>
<td>7%</td>
</tr>
<tr>
<td>Capacity/willingness to change</td>
<td>7%</td>
</tr>
<tr>
<td>Business value of IT</td>
<td>7%</td>
</tr>
<tr>
<td>Lack of leadership/planning/strategy</td>
<td>7%</td>
</tr>
<tr>
<td>Management sponsorship/understanding/relationships</td>
<td>3%</td>
</tr>
<tr>
<td>Process/operations</td>
<td>3%</td>
</tr>
</tbody>
</table>

What is your biggest barrier to achieving your objectives in your role?

South Korea (n = 30)*

* Small sample size. Results are directional.

Source: Gartner (April 2017)

Drilling down into the reported skills shortages, South Korean CIOs report one gap that is all too common: business intelligence and analytics skills (see Figure 13). However, for South Korean
businesses, new technologies is a second area of skills shortage not prevalent elsewhere (see Figure 14).

Figure 13. Biggest Talent Gaps Cited by South Korean CIOs

What would you say is the biggest talent gap (that is, lack of skills) related to information, technology or digital business your government or public entity/business unit/company is trying to fill at the moment?

South Korea (n = 28)*

* Small sample size. Results are directional.

Source: Gartner (April 2017)
Figure 14. Biggest Talent Gaps

Source: Gartner (April 2017)

Call to Action:

The skills shortage in South Korea is critical. Business intelligence skills and general levels of IT literacy seem particularly problematic. While there are no magic bullets to address these shortages, South Korean CIOs should:

- Develop relationships with local higher education establishments to source promising talent.
- Scan existing employees (both IT and business) for latent abilities that can be put to more valuable use.
- Rotate IT staff into business roles, and business staff into IT.
- Consider also hiring "unconventional" candidates who show potential, but would not normally be recruited into a role in the IT organization.

In South Korea, In-House Sourcing of Critical Digital Components Is Uncommon

The case study enterprises studied for this year's CIO agenda report demonstrated clearly that success in digital business hinges to a greater or lesser extent on the flexible sourcing (or in Gartner terminology, "adaptive sourcing") of IT capabilities (see "The 2017 CIO Agenda: Seize the Digital Ecosystem Opportunity"). As Figure 15 illustrates, South Korean enterprises tend to source their critical digital capabilities from their external and existing suppliers, and develop a relatively low proportion in-house compared with the sample average (to an even lesser degree than top performers).

The challenge with sourcing digital capabilities from existing suppliers is that, in general, these same capabilities are available to other competitors in an industry, and may be mature products that lack the innovative edge important when competing for dynamic digital markets.
Call to Action:

South Korean CIOs should:

- Consider the merits of building more critical digital capabilities in-house, even in the face of acute skills shortages. The business case might justify the cost of setting up or strengthening the digital team.

When reviewing engagement strategies with startups, South Korean CIOs should:

- Review any remaining regulatory, procurement, architecture and other barriers to the sourcing of innovative digital capabilities, and work to eliminate these on a systematic basis.
South Korean CIOs’ Stakeholders Are Only Moderately Satisfied With IT’s Performance

The net result of CIOs’ efforts spread across support for digital ecosystem membership, prioritization in the face of IT budget cuts, focus on core technologies, and struggle with the IT talent gap and creative sourcing is a group of stakeholders that moderately satisfied the efforts of the CIOs and their IT departments. This is on par with the overall survey sample (see Figure 16). While there are some areas where South Korean CIOs may need to focus to prepare for a more intensely digital-ecosystem-driven business environment, their user communities are generally supportive of their IT leadership.

Call to Action:

South Korean CIOs should:

- Remain focused on business outcomes and innovation, even in the face of IT cost-reduction targets.
- Refocus on attaining those targets, perhaps by cutting funding to habitual or less-value-creating projects to free up funds for more valuable, often digitally enabling, areas.

Figure 16. Satisfaction of IT Organization's Stakeholders' Management

Source: Gartner (April 2017)
Continue to focus on maintaining the reasonable level of stakeholder engagement that appears to be in place now, and use this strong position as a springboard for the next move in the evolution of digitalization in the enterprise.

Methodology

The CIO survey was conducted during 2016, based on a number of hypothesis developed by the Gartner CIO research community. The results of the 2017 Gartner CIO Survey have formed the basis for the 2017 CIO Agenda (see the Gartner Recommended Reading section). This research document uses the results of the 2017 survey and explores the areas where the responses from the South Korean region lead to additional observations — either contradicting or supporting the global findings.

The purpose of this research document, therefore, is not to comment on the entire survey, but rather to serve as a supplement that highlights special areas of interest for South Korean CIOs and other stakeholders with an interest in the South Korean region. The findings from the total dataset were published in its entirety as "The 2017 CIO Agenda: Seize the Digital Ecosystem Opportunity."

Acronym Key and Glossary Terms

| digital ecosystem | an interdependent group of actors (enterprises, people, things) sharing standardized digital platforms to achieve a mutually beneficial purpose. Different ecosystems can coexist if separated by geography, market or category. |

Gartner Recommended Reading

Some documents may not be available as part of your current Gartner subscription.

"The 2017 CIO Agenda: Seize the Digital Ecosystem Opportunity"

"2016 CEO Survey: The Year of Digital Tenacity"

"Build Alliances to Thrive in Business Ecosystems"

"Architect Digital Platforms to Deliver Business Value and Outcomes"

"Winning in the Platform Game, Part 1: Understand the Game and Determine Your Role"

"Five Business Ecosystem Strategies Drive Digital Innovation"

"Building a Digital Business Technology Platform"

"2016 Strategic Roadmap for Digital Business Transformation"

"Building the Digital Platform: The 2016 CIO Agenda"

"Flipping to Digital Leadership: The 2015 CIO Agenda"
"Digital Business Transformation: Turning the Digital Dream Into Reality"

"Hints and Tips on Using Gartner Numbers When Reviewing IT Spending Plans"

Evidence

This research is based on the 2017 Gartner CIO Survey conducted between 8 May and 9 July 2016, with 31 CIOs in South Korea responding out of the global total of 2,598.
GARTNER HEADQUARTERS

Corporate Headquarters
56 Top Gallant Road
Stamford, CT 06902-7700
USA
+1 203 964 0096

Regional Headquarters
AUSTRALIA
BRAZIL
JAPAN
UNITED KINGDOM

For a complete list of worldwide locations,
visit http://www.gartner.com/technology/about.jsp