

# 2013 Vietnam IT Report

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## Abstracts

Which industry is contributing the most to Vietnam's economic growth? One might ask. There could be oil and gas, agriculture, textile, or anything else, but it cannot be denied that the IT industry is the key driver for the whole economy. IT has made a significant contribution to the country's GDP. Vietnam is now ranked among the most attractive destinations for outsourcing. FDI companies such as Samsung, Nokia, Canon, Intel, Foxconn, and Gemtek Technology have increased their commitment and investment in Vietnam.

Despite the fact that Vietnam has faced global economic downturn and domestic challenges, the IT industry could still score an annual revenue of USD 13.633 billion in 2011, a 79% year-over-year growth thanks to a rocket increase in the hardware sector. The growth seems to continue and we anticipate that the IT industry would reach a revenue of USD 17.6 billion in 2012. These developments are amazing since the average growth rate during the 2001-2010 period is between 20% and 25% per annum.

## GDP AND IT INDUSTRY GROWTH IN VIETNAM

In light of achievements during 2000-2005, Vietnam's IT industry has maintained high growth rates and achieved significant results during 2006-2010. The industry has become a key economic-technical sector, and also one important driving force for economic development, reducing poverty and improving people's living standards. IT helps bring Vietnam gradually catch up with developed countries around the world. The development of Vietnam's IT industry is diversely in several sub-fields such as software industry, hardware industry, digital content industry, and IT services. The hardware sector contributes the most to the industry revenue but has low added value due to strong concentration on simple assembly lines. The digital content industry and IT services are expected to boom in coming years but Vietnamese companies might lose the domestic markets to foreign competitors. The software industry is still very much

fragmented as Vietnamese software firms are still small in size and lack of strategic and creative directions. Furthermore, global financial crisis and challenging domestic economy have caused software and digital content sectors to have slower growth.

This 85-page strategic report, prepared by our local industry insiders and subject matter experts, will help explain further details of the Vietnamese IT industry and subsectors. Audiences will start to have big picture about the industry by understanding what others have recognized about it via international ranking in particular areas. Take, for an example, we can better understand the status of e-Government in Vietnam later on when we, at the beginning, realize where it is against other its counterparts in the region and in the world.

Audiences then can enjoy a comprehensive SWOT analysis for the Vietnamese IT industry. At this level of abstract, we have moved a further step to touch on some key points about the industry and subsectors. Keep that in mind, audience will benefit more by further investigating the regulatory aspect in the next chapter. We shall better understand about the policies applied in the industry, both fundamental and promotion ones. We can investigate the national strategy of Vietnam on ICT development. To move on we can build our understandings about industry stakeholders, especially the regulator and professional associations. We will have opportunities to review on what are going on in reality and which technology advances and IT applications have been being used in Vietnam. We, step by step, address the issues such as E-Government, digitized systems and applications, IT parks, and communications infrastructure and the Internet in Vietnam. We see what are going on in reality out there.

Accumulating the foundations in previous chapters, one can further review one or all single components of the Vietnamese IT industry: hardware, software, and digital contents in many perspectives: historical development, SWOT analysis, essential industry indicators, key categories and major companies, and human resources. One can go further to learn more about some Vietnamese leading companies in the field.

At the end of the day, one can find the answer for the question: Is a 90-million-population Vietnam a market or an IT global center of production and development? This is a turning point which makes this report helpful for economists, researchers, analysts, ICT vendors and companies, investors, and eventually end users.

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