

**Survey Research on e-Learning
in Asian Countries - Fiscal Year 2002
(Country Specific Report - Vietnam)**

- Table of Contents -

1. Market: Market Trends of e-Learning.....	1
1.1 Status of IT Promotion (Centered on the Internet).....	1
1.1.1 Outline of the Internet.....	1
1.1.2 Outline of ISP.....	1
1.2 Status of Education and Training System.....	2
1.2.1 Higher Education.....	2
1.2.2 Vocational Education.....	3
1.3 IT Human Resources Required.....	4
1.3.1 Outline of IT Human Resources.....	4
1.3.2 Outline of IT Human Resource Education.....	4
1.4 E-Learning Market Trends.....	4
2. Technology: Trends of e-Learning System (Synchronous & Asynchronous).....	5
2.1 Hanoi University of Technology (HUT).....	5
2.1.1 Overview.....	5
2.2 Project Name: The Distance Education project.....	5
2.2.1 Overview.....	5
2.3 Project Name: Vietnam Human Resource Development Project.....	5
2.3.1 Overview.....	6
2.4 Service Name: MeetingPlaza.....	6
2.4.1 Overview.....	6
3. Advanced Activities.....	6
4. Government Policy and its Vision (Mid- and Long-term Direction).....	7
4.1 Status of IT Policies.....	7
4.1.1 Overview.....	7
4.1.2 Policies and its Details.....	7
4.2 E-Learning Related Measures as Part of IT or Educational Policies.....	8
4.3 Laws Regulating Rights for Intellectual Property and Personal Information in e-Learning.....	8
4.4 Vision.....	8
4.5 International and National Conference.....	8

1. Market: Market Trends of e-Learning

1.1 Status of IT Promotion (Centered on the Internet)

1.1.1 Outline of the Internet

Due to prolonged civil war and social disruption, Vietnam has been slow in improving the social infrastructures, including the communication infrastructure.

Vietnam has been concerned about information freely flowing into the country from foreign countries via the Internet. This has prevented the country's IT level from reaching a level satisfactory for the free use or effective use of IT for business purposes. Basically, in this country only websites that are judged by the government as "culturally acceptable" can be viewed through the Internet.

According to the statistics of ITU (2001), the number of Internet users in Vietnam in 2001 was about 1,001,000, which means that the Internet diffusion rate in this year was about 1.24%. Considering the fact that Vietnam has just begun to use the Internet in December 1997 and, according to the ITU survey, the number of Internet users in 1998 and 1999 was about 10,000 and 100,000 respectively, Internet use in Vietnam is growing rapidly.

However, Internet use is still limited because of high subscription fee compared to the income level of citizens and an insufficient number of computers. Meanwhile, there is also a movement to use the Internet actively as a means for publishing information from the government.

In Vietnam, 70% of the Internet users are foreigners and government organizations, while most Vietnamese use the Internet in Internet cafes in big cities such as Hanoi and Ho Chi Minh City. The number of Internet cafes in this country in 2002 was estimated to be approximately 4,000.

ADSL is available in Hanoi, Ho Chi Minh, and Haiphong since March 2002, after the Vietnam Data Company (VDC) made a test installation in Haiphong.

Vietnam has currently no broadband service by CATV subscriber line. The only CATV provider in Vietnam is Vietnam Television. However, Hanoi Television, in partnership with Hanoi P&T, plans to enter this business.

1.1.2 Outline of ISP

The largest ISP in the market is VDC, which has an affiliation with Vietnam Post and Telecommunications Corporation (VNPT). The second largest is the Corporation for Financing and Promoting Technology (FPT).

VDC has an international bandwidth of 106Mbps for Internet use, as of April 2002. It has used Singapore Telecom IX (IXP) as a main international bandwidth provider, as well as a provider in Hong Kong, for worldwide connection bypassing the U.S. core. FPT and Viettel acquired an IXP license in May 2002.

Privatization of ISPs is in progress. "Prime Ministerial Decision No. 178/2002/QĐ-TTg (February 28, 2002)" has allowed FPT, the leading ISP, to become a joint stock corporation.

Table 1-1 Main ISPs

ISPs	Overview
Vietnam Data Company (VDC) (Brand name: VietNamNet) http://www.vnn.vn/	VDC was established in December 1989. VDC is a government-run company having a business affiliation with VNPT, which provides postal and communication services in Vietnam. VDC is responsible for the administration and management of the Internet service called VNN provided by VNPT. Using the Internet backbone of VNN Vietnam, VDC provides Internet connection throughout the country. VDC now also provides dedicated lines in addition to dial-up service.
The Corporation for Financing and Promoting Technology (FPT) http://www.fpt.vn/	FPT was a government-run company belonging to the Ministry of Science, Technology and Environment. It was converted into a joint stock corporation in February 2002. FPT is the largest company in the field of software development in the country.
Saigon Postel (Brand name: SaigonNet) http://www.saigonnet.vn/	Saigon Postel is one of the government-run companies including VNPT. SaigonNet is an Internet service provided by SPT (Saigon Post and Telecommunications Service Corporation). It provides e-mail service and Web hosting service, etc.
Viettel http://www.vietel.com.vn/	Viettel is a government-run company belonging to the Ministry of Defense. Viettel acquired an IXP license in May 2002.
Institute of Information Technology (IOIT) (Brand name: NetNam) http://www.netnam.vn/	IOIT is a government-run company belonging to the Ministry of Science, Technology and Environment. IOIT is an Internet access provider established in Hanoi in 1994 that is administered by the Institute of Information Technology. IOIT is mainly used by NGOs and multinational organizations for the development of the country. Services provided include e-mail, forums, databases, and telephone conferencing, etc.

Source: Multiple reference documents

1.2 Status of Education and Training System

1.2.1 Higher Education

The central administrative organization for education in Vietnam is the Ministry of Education and Training (MOET). Administration of education is provided in three levels: the government, provinces, and cities and villages. Specifically, the government is responsible for planning of education policies and setting of education course standards for various schools while local authorities are responsible for the execution and supervision.

As for schools, technical and vocational education schools are provided and administered by each governmental organization. Most universities and colleges are provided and administered by the government, but some universities are provided and administered by provinces (including cities under central authority). In Vietnam, the literacy rate of adults is more than 90%.

In 2001, there were 136 national universities and 17 private universities, which are approved for the establishment recently. Among the national universities, 40 universities have master's courses, among which 20 universities have doctoral courses.

The number of students going to universities has been rapidly increasing. The number of students in universities almost doubled from about 460,000 in 1996 to about 900,000 in 1999. This significant increase is mainly attributed to the newly established private universities. The number of teachers also increased from about 20,000 in 1996 to about 30,000 in 1999.

Since the 1980s, the central government has basically allowed autonomy of higher education institutions so that each university can determine the curriculum on its own, except for the minimum guidelines and standards for knowledge and skills that should be taught. In 1998, an education law that abolished the conventional curriculum approval system was enforced so that each university could freely determine the curriculum. The education law also specified the provision of an Accreditation Council to establish a system through which education and research levels of higher education organizations are evaluated so that the organization can keep the levels.

With recent economic growth that demands a workforce having advanced knowledge or skills as a background, the government is also actively working on adult education for the purpose of improving the education level of the citizens.

In 1993, Hanoi Open University (HOU) and HCM City Semi-Public Open University were established. These universities are administered as semi-private universities for which school buildings are prepared by the government and only the funds for running the universities are provided by the private sector. Each university provides education in which radio broadcasts and correspondence materials (e.g., video cassette, audio cassette, and textbooks) are used in order for students to study in regional centers or at home. Audio-visual materials are also utilized in the main campus. These universities also provide an education course for advanced and mid-level engineers and managers of companies.

1.2.2 Vocational Education

Vietnam has vocational training institutions as shown below.

- 1) Vocational training school
- 2) Vocational training center
- 3) Non-public training school
- 4) Intermediate vocational school
- 5) Intermediate technical school

As of 2000, schools of 1) and 2) were equivalent to the lower and upper secondary education of the general course, and they were intended for those who had completed the primary or the lower secondary education. Schools of 3) and 4) were equivalent to the upper secondary education or higher education for which those who had completed the lower or upper secondary education are eligible to enter.

Schools of 1)-3) are supervised by the Ministry of Labor, War Invalids and Social Affairs (MOLISA), while schools 4)-5) are supervised by the Ministry of Education and Training (MOET).

MOLISA started supervising vocational training in the country in 1998. MOLISA is different from MOET in that MOET supervises vocational training focused on both practical training and desk study while MOLISA provides a program focused on technical training to foster a workforce having an adaptable fighting potential.

Teachers of a vocational training organization must have a bachelor's degree or must complete a three-year teacher training program. Any teacher must have training again before being dispatched to a site to teach a course. Teachers are classified into two levels by a national qualification system. The provinces supervise improvement of teachers and curriculum.

1.3 IT Human Resources Required

1.3.1 Outline of IT Human Resources

It is estimated that about 20,000 IT related staff worked in governmental sectors and IT user departments of the private sector in Vietnam as of 2000, among which about 2,000 had majored computer science in universities. Universities and colleges related to computer science have about 600 teachers. The number of IT experts in IT companies is said to be about 4,000, among which about 2,000 have graduated from universities or equivalent schools or higher educational organizations. Education of IT human resources in Vietnam has provided 7,000 or more graduates from IT related faculties and annually provides more than 3,500 graduates.

1.3.2 Outline of IT Human Resource Education

Those universities having IT related faculties include Hanoi University of Technology (HUT), Vietnam National University Hanoi, Hochiminh City University of Technology, Vietnam National University - Ho Chi Minh City (VNU-HCM), Hue University, and Can Tho University (CTU). There are software training centers in Hanoi and Ho Chi Minh City.

In addition to such formal education, "open college" is also provided in which various paid trainings for external students is held for a period from few weeks to few months.

The government has a limited annual budget for the entirety of universities. Thus, each university must make up the revenue shortfall mainly by holding seminars. Due to this, computer related courses or other courses for external students make a valuable income to the budget-strained universities.

As in the universities, government-run companies also provide computer education courses, though the contents are merely training for application software. These courses are expensive but a great number of people desire to take them.

There are also many private education organizations in the city. Schools specializing in software provide courses as shown below:

- Secretary and typist course (one year)
- Executive secretary course (two years)
- Desktop publishing course (two years)
- Business information technology course (two years)
- Multimedia information technology course (two years)

Japanese, U.S., and European companies have started to outsource their businesses to their divisions in Vietnam, according to the investigation report by Research Vietnam. For example, such outsourcing companies include multinational companies such as Nortel Networks, Cisco, IBM, HP, British Aerospace, British Petroleum, Sony, and Tata Consultancy Services.

It is estimated that the cost for software development in Vietnam is 90% lower than that in the U.S., or 1/7 to 1/3 of that in India. The Vietnamese government provides policies to support the development of the software outsourcing industry, including a nation-wide IT development strategy. Ho Chi Minh city also has a budget for improving the infrastructure and fostering IT related human resources. There is a suggested plan to foster 25,000 software development engineers by 2005.

Multinational companies such as Aptech, Oracle, TCS, Microsoft, Cisco, and Novell also have training centers in Vietnam.

1.4 E-Learning Market Trends

Information unavailable.

2. Technology: Trends of e-Learning System (Synchronous & Asynchronous)

Due to the communication infrastructure environment or IT literacy in Vietnam, most e-learning related activities are performed on a project basis.

An e-learning center built in the outskirts of Hanoi with the support of the Ministry of Economy, Trade, and Industry of Japan is expected to work as a core organization for e-learning related activities. The center now uses LAN provided in the facility to utilize e-learning materials provided from Japan for those who take IT Professional Examination.

A project called "Network Campus Initiative for Asia e-Learning", which was an experimental project by AEN in 2002, has been performed by Keio University, HUT, Vietnam National University Hanoi, the Institute of International Relations, Hoa Lac High-Tech Research Park, etc.

Several cases related to e-learning are described below.

2.1 Hanoi University of Technology (HUT)

URL: <http://www.hut.edu.vn/>

2.1.1 Overview

HUT was established by the present Vietnamese government in 1956 as one of the first five universities.

HUT has been aggressive in international cooperation and has affiliation with more than 100 foreign universities, research organizations, and companies. HUT has an affiliation program through which teachers of foreign universities and organizations can be invited to HUT to provide special certificates to those who have completed the courses. This program provides one bachelor's degree course and six master's degree courses.

HUT has a campus covering 35 hectares at the corner of Dai Co Viet Street and Giai Phong Street in the south of Hanoi city in which a well-developed library and computer facilities are provided.

The HUT Website describes two WBT courses for physics that are presumed to have been operated in September 2000 (the details are unclear because the URL cannot be accessed).

2.2 Project Name: The Distance Education project

Main related organization: Can Tho University (CTU)

http://www.ctu.edu.vn/index_e.htm

http://www.ctu.edu.vn/daotao_tuxa/index_e.htm

2.2.1 Overview

"The Distance Education project" is part of a joint program by CTU and the Flemish Universities of Belgium under the financial supervision of the Flemish Council of Universities (VLIR).

This project's objective is to develop and test a distance learning system to satisfy the needs of the Mekong River region in Vietnam.

In phase I, this project has been operating three experiments for the fields of economics, science and others from April 1998 to March 2003.

2.3 Project Name: Vietnam Human Resource Development Project

Main related organizations: International Communications Foundation (ICF), Waseda University, Post and Telecommunications Institute of Technology in Vietnam

2.3.1 Overview

A distance education experiment was conducted from 1999 to 2000 through cooperation between ICF and other foundations.

In this experiment, remote lectures were provided regarding information communication technology through videoconference system using international ISDN lines, to test the information infrastructure and the distance education contents (e.g., material) developed by the universities.

2.4 Service Name: MeetingPlaza

Main related organizations: NTT-IT Corporation and FPT

<http://www.meetingplaza.com/FPT/>

* Although this is not an e-learning related project, MeetingPlaza is a unique commercial service for providing a videoconference service in Vietnam by ASP and will be described below for reference.

2.4.1 Overview

Through an affiliation between NTT-IT Corporation and FPT, an ASP service for an Internet multi-point videoconference system called MeetingPlaza by NTT-IT Corporation was started in Vietnam in April 2002. "The Internet multi-point videoconference: MeetingPlaza ASP service" is sold by FPT to Japanese companies in Vietnam and Vietnamese companies having business relations with Japanese companies.

3. Advanced Activities

Information unavailable.

4. Government Policy and its Vision (Mid- and Long-term Direction)

4.1 Status of IT Policies

4.1.1 Overview

ICT national strategies in Vietnam include "IT2000 (2001-2005)" and the next "IT Vision2020 (2005-2020)".

Measures and policies regarding information communication in this country are divided into (1) those determined by the prime minister and (2) those led by ministries in the government.

4.1.2 Policies and its Details

(1) "IT2000 (2001-2005)"

IT2000, also called "IT development master plan", was announced by the government in April 1995 to promote the introduction of IT into Vietnam by 2000. IT2000 was mainly developed by the Ministry of Science, Technology and Environment (MOSTE) and an "IT2000 Office" was established in MOSTE to promote this policy.

The main objective of IT2000 is providing IT related departments in main universities, fostering IT engineers, improving IT infrastructures in governmental organizations, promoting IT industries, and improving and supporting an IT network environment, as well as filling the gap between Vietnam and neighboring countries. Another important objective is to develop human resources.

The "Resolution No. 07/2000/NQ-CP" for IT development from 2000 to 2005, dated June 5, 2000 has pointed out the weakness of IT sections in Vietnam in contrast to the increase of global demand for IT industries. This paper also showed, however, a possibility of the software industry being a forefront runner in the development of Vietnam's economy in the near future and being given advantageous conditions and priorities. In particular, this resolution clarified the objectives as follows:

- To develop about 25,000 highly-skilled engineers and computer programmers by 2005.
- To give software industries special privileges for investment capital and import tax and apply preferential treatment to income tax for the export of software products.
- To revise copyright law to promote investment and software development.

This resolution was followed by the prime minister's approval of "Decision No. 128/2000/QD-TTg" in November 2000 on a number of policies and measures to promote investment in and development of the software industry. This decision includes the following contents.

- Vietnamese software enterprises and foreign software enterprises operating in Vietnam, not under the Law on Foreign Investment in Vietnam, shall enjoy the enterprise income tax rate of 25%.
- The tax rate of 20%, for enterprises investing in geographical areas with difficult socio-economic conditions.
- The tax rate of 15%, for enterprises investing in geographical areas with particularly difficult socio-economic conditions.
- Software enterprises subject to the Law on Foreign Investment in Vietnam shall enjoy the enterprise income tax rate of 10%.
- Software enterprises shall be exempt from enterprise income tax for four years.
- Software products and services shall enjoy the highest value added tax preferences.
- Import tax shall be exempt for raw materials and materials in direct service of activities of producing software products. Software products shall be exempt from export tax.
- Credit preferences, land use and rent preferences.
- Protection of copyright over software products.
- Training and development of IT human resources.

(2) "IT Vision2020 (2005-2020)"

This is a strategy by 2010 and a guideline for IT development by 2020 according to which a steering committee led by MOSTE was established for the support of the Office of the Prime Minister.

Main objectives of IT Vision2020 include establishing a national information infrastructure to keep up with neighboring countries and providing efficient, nation-wide, high-speed and high quality communication.

(a) "Political Bureau's Directive No. 58/CT/TW (2005-2010)"

This has an objective of allowing Vietnamese IT industry to reach an advanced level by 2010 compared to neighboring countries. Specifically, the objective is: to allow the ratio of the Internet users in this country to be 1.5% of the population by 2005; to provide a 20 to 25% average annual growth rate of IT industry; to increase the production of the software industry to be equivalent to 5 million U.S. dollars; and to train more than 50,000 IT experts, including 25,000 programmers.

The main projects are as follows:

- Improve the telecommunication network and to provide a higher quality Internet infrastructure
- Develop human resources for the IT industry
- Develop domestic software
- Promote local hardware industries

(b) "Directive of the General Department of Post No. 01/2001/TCBD (2010-2020)"

This points out the necessity of providing favorable conditions that facilitate the development and application of IT technologies, which secure the speed and quality. Its objectives are to provide a national information super highway covering the whole nation that ensures high capacity, high speed and high quality at a reasonable fee, thus lifting the rate of Internet users to the global average.

The main projects are as follows:

- Improve the National Information Infrastructure (NII)
- Enhance competitiveness
- Reduce the fee for communication and Internet
- Innovate business entities

4.2 E-Learning Related Measures as Part of IT or Educational Policies

"Directive of the Ministry of Education and Training No. 29/2001/CT" dated June 30, 2001, includes a description for the use of ICT in education.

4.3 Laws Regulating Rights for Intellectual Property and Personal Information in e-Learning

Information unavailable.

4.4 Vision

Information unavailable.

4.5 International and National Conference

Conferences related to e-learning are as follows.

(1) "Vietnam Ict in Education" conference and expo

- Period: February 2003

This was a conference and expo held by IDG, a private company, regarding the IT use in education in Vietnam.

Originally, this conference was planned for the end of January 2003 but was postponed to the end of February 2003, according to information provided by the host, in the middle of February 2003.

According to the host, outline of this conference is as follows.

- Estimated number of participants: 1,000
- Speakers: Vietnamese government, universities, U.S. companies (Intel, Microsoft, IBM), etc.
- Exhibitors: Samsung, LG, Benq, CMS, FPT, etc.
- Host Organizations: IDG World Expo Asia, the Vietnam Chamber of Commerce and Industry, the Center of Information Technology, Ministry of Education and Training in Vietnam

(2) Seminar by the University of Southern Queensland (USQ), Australia

- Period: January 26, 2002

USQ has made a strong effort regarding distance education and has started providing an online MBA course in Vietnam from January 2002. This seminar is an explanatory meeting for the course. Local responsible sector for this course will be New Star ELT Center Vietnam, an Australian capital company for English learning and training.