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E-tourism at a glance..... Vietnam

Contents

Introduction	2
Starting context.....	3
1) Destination characteristic	3
2) Tourism in Vietnam	4
3) International Position	5
4) Sub-Area Position	6
5) Number of arrivals	6
7) Use of Internet at ends to promote the destination or compromise	8
Definition of a national strategy/Level of partnership.....	9
1) General Objective	10
2) Specific Objectives	11
3) Tourist Markets	11
4) Investments	13
5) Tourist Development and planning	13
6) Human Resources	14
7) Promotion and marketing	15
8) Regional Development	16
9) Laws and payments	17
10) Information Technology	18
Sub-area Branches	21
1) Tourism in Vietnam	21
2) Saigon Tourist	21
3) Existing establishments	22
4) Possible or considered establishments	22
Opportunities	23
Difficulties encountered	24
1) Difficulties encountered to reach the final tourist	24
2) Role and importance of tour operators	25
3) Data-processing Infrastructures, internal cover, and data-processing tools availability	25
Good practices	30
Conclusion.....	31
Bibliography.....	32
Webgraphy	33

Introduction

This case study report presents a description of the tourist context in Vietnam; a description of the national policy as regards of tourist development; a study on existing establishments, possible or considered; an analysis of opportunities present and future as regards of the ICT use; difficulties encountered by the local tourist companies to reach the final tourist; and a summary of the Vietnam good tourist practices.

Starting context

1) Destination characteristic

With a strong history, the Socialist Republic of Vietnam is today an increasingly coveted tourist destination. Its economic capital, Hô Chi Minh City, counts more than 6 million inhabitants, and the national capital of Ha Noi counts 2,5 million citizens. The largest cities after those, in order of importance, are Hai Phong (1,8 million inhabitants) and Da Nang (800 000 inhabitants). The whole country counts approximately 83,5 million people, distributed on a territory of 332 378 square kilometers. The density of population is approximately 250 inhabitants per square kilometer and, according to 2002 data, the gross domestic product (GDP) per capita was located at 2 179 USD¹. The unemployment rate fluctuates from 4% to 8%, but it happens to be more important². The urbanization rate is 24,5%, and the country counts more than 54 ethnoses groups which represent approximately 15% of the total population. The official language is Vietnamese. English is increasingly present, and French is always spoken by a small proportion of the population. The literacy level is at 95,9%³.

The South of Vietnam has a tropical climate, and the North is characterized by the monsoon. The season phenomenon exists in the country and has an influence on the tourist industries organization. In the North, there are four seasons during which the temperature varies from 13°C to 17°C the winter, and from 27°C to 34°C the summer. In the South, the climate varies a little, and the temperature borders the 27°C all the year.

In the arrival field, the hollow period is that of the summer, which corresponds to the rain season, from May to October. The tourist season starts in November and finishes at the end of the dry period, end of April. In the departure field, it is also during the summer that one observes the strongest displacements' concentration, this period corresponding to the summer school holidays.

¹ Source : website <http://www.populationdata.net/pays/asie/vietnaMr.php>

² Data provided by Mr. Nguyen Duc Tri of the Faculty of Commerce and Tourism, University of Economics Hô Chi Minh City

³ Data provided by Mr. Luong Trung Hieu of Saigon Tourist – See Appendix 1

2) Tourism in Vietnam

The tourism industry is relatively young in Vietnam. In 1960, the tourism strategic plan already existed, but the war slows down the development of the hotel infrastructures and only some hotels were built years 1960 to years 1970. From 1975 to 1990, the strategic plans of tourist development were better elaborated. Already at this time, it was necessary to make reservation very early for a stay in Vietnam. All the companies belonged to the State. It is, on the other hand, for the period going from 1990 to 2000 that industry really took its rise. The country developed its opened doors policy, which allowed the arrival of large hotel investors. It is during this decade that privatization started with the first Sofitel hotel joint-venture. In ten years, beyond 600 USD million were invested in the Vietnamese hotel infrastructures.

Of all the employees who have a job in the tourism field, 230 000 have an employment directly connected to industry, while 500 000 have a work which is indirectly connected there. On this total of 730 000 employees, 60% never received education and 40% hold a first cycle university diploma. The personnel of the tourism industry in Vietnam is relatively young, 40% of the employees are old less than 30 years⁴.

The employment opportunities in the tourism field are numerous, but it does not include employment in the restoration field, this industry forming part of the commercial sector.

According to the salaries, those much vary according to the type of employment. The trades located at the bottom of the hierarchical scale allow to a citizen to gain 100-120 USD per month, whereas the employees of the tourist field receive 120-140 USD per month. In the hotels, the employees are paid a little better with a wage scale of 120-200

⁴ Data provided by Dr. Nguyen Van Manh of the Department of Tourism, University of Social sciences and humanities of Ha Noi

USD. The most well paid employees are the information technology engineers with a scale from 4 to 6 million dongs per month, which values 265-400 USD⁵.

Currently, the country counts 3128 lodging places recorded, of which: 1956 hotels, 666 small hotels, 434 rented apartments, 53 tourist villas, 11 tourist villages, and 8 campsites⁶. The hotel system classifies the hotels on a scale from 1 to 5 stars; 3840 rooms are classified 1 star; 6977, 2 stars; 7752, 3 stars; 4966, 4 stars; and 5251, 5 stars⁷. The number of rooms available in Vietnam grows quickly. In 1992, there were 13 050 rooms and, according to the last 2004 census, this number reached 85 381, an increase of 654% in 12 years. The authorities envisage that, in 2010, the number will have reached 135 200 rooms, which will make an additional increase of 158%.

Of all the tourist receipts perceived by the country, it is Hô Chi Minh City which receives the greatest part (50%). Ha Noi arrives in second position with 20% to 25%, and the remainder is distributed between the other most popular cities, such as Hue and Hai Phong⁸.

3) International Position

Vietnam signed bilateral cooperation agreements with more than 22 countries: initially with the close countries like Laos, the Philippines, Thailand, Malaysia, Indonesia, China, Burma, Singapore, and Cambodia; then, on an international scale, with France, Israel, Uzbekistan, Russia, Cuba, Ukraine, the Indies, Brunei, Spain, South Korea, Hungary, Sri Lanka, and Turkey. Germany will be added soon to this list⁹.

⁵ Data provided by Mr. Nguyen Duc Tri of the Faculty of Commerce and Tourism, University of Economics Hô Chi Minh City

⁶ Data provided by Mr. Luong Trung Hieu of Saigon Tourist – See Appendix 1

⁷ See in appendix the classification of the hotels provided by Mr. Ta Nam Binh of the Department of Tourism, Hô Chi Minh City

⁸ Data provided by Mr. Nguyen Duc Tri of the Faculty of Commerce and Tourism, University of Economics Hô Chi Minh City

⁹ Data provided by Mr. Luong Trung Hieu of Saigon Tourist – See Appendix 1

4) Sub-Area Position

Although domestic tourism in Vietnam represents a great part of market, it does not have a growth rate as high as that of international tourism. In 2001, 12,1 million Vietnamese traversed the country, comparatively to 15 million in 2005, an increase of 24%. For 2006, the authorities envisage a growth of 11% comparatively to 2005, with 16,7 million domestic tourists. It is interesting to note that there are ten times more domestic tourism (30 million displacements) in the Vietnam than international tourism (3 million)¹⁰. Domestic tourism is on its top during national events such as the ‘‘Têt’’¹¹ whereas the hotels’ occupancy rate reaches very high levels.

5) Number of arrivals

The increase in the number of rooms is connected to the growth of the international arrivals in the country. In 1998, the number of visitors amounted to 1,52 million. Four years later, in 2002, one counted 2,6 million arrivals, a growth rate of 71%. The following year (2003), the country knew a fall of 8%, due to the aviary influenza. Lastly, from 2003 to 2005, there was another rise of 42%, the arrivals passing from 2,4 million to 3,4 million. For the year 2006, the authorities envisage a custom of 3,8 million tourists, a growth rate of 12% compared to 2005¹². Let us also note that half of the international tourists land in Hô Chi Minh City before visiting the other cities¹³. The average stay of a tourist in this city is three days¹⁴.

6) Principal current tourist markets

The VNAT notes that most of the tourists visit more than one country at the time of their stay in the Southern Pacific area, and Vietnam forms part of their route¹⁵. With regard to the development of consumer loyalty of the visitors, a large majority of the

¹⁰ Data provided by Mr. Nguyen Duc Tri of the Faculty of Commerce and Tourism, University of Economics Hô Chi Minh City

¹¹ The Têt is the Vietnamese New Year

¹² Data provided by Mr. Luong Trung Hieu of Saigon Tourist – See Appendix 1

¹³ Data provided by Mr. Nguyen Duc Tri of the Faculty of Commerce and Tourism, University of Economics Hô Chi Minh City

¹⁴ Data provided by Mr. Ta Nam Binh of the Department of Tourism, Hô Chi Minh City

¹⁵ Data provided by Mrs. Nguyen Thanh Thuy of the French Branch, Department of the Tourism, University of Hue

tourists are not allocated to Vietnam unless having there family members¹⁶. However, the Chinese, who are most inclined to visit the country, are also the only ones to pay multiple visits because of the geographical proximity and the cultural similarities of the two countries. In 2005, the Chinese add up 23% of the international tourists, followed American with 10%. Japan and South Korea follow with 9%, Taiwan 8%, Cambodia 5%, Australia and France 4%, the United Kingdom 2%, just like Germany, Canada, Thailand, Singapore, and Malaysia. Laos arrives in fifteenth position with a weak of 1%. Remaining nationalities represent 15% of the international tourists¹⁷. The principal Vietnam competitors are littoral countries like Indonesia and Thailand, or other countries where the culture is very present, like China. The interest of Europeans for Vietnam is related to the culture, contrary to the Japanese who prefer to go and rest there. The strategy of the authorities is to develop the ecotourism to attract a new kind of customers¹⁸.

In figures, the international arrivals of the principal transmitting markets in 2005 are as follows: 752 576 Chinese, 333 566 Americans, 317 213 Koreans, 286 324 Taiwanese, 320 605 Japanese, and 186 543 Cambodian. The principal means of transport used are the plane (65%), the boat (6%), and the surface transport (29%). The foreigners not only go to Vietnam mainly for leisure (58,87%), but also to visit family and friends (14,57%), and others are there for business (14,23%). The other motivations represent 12,33% of the stays.

On a purely informative basis, one can consult in appendix a document collected with Sofitel hotel of Hô Chi Minh City, which presents the arrivals of foreign tourists, the occupancy rate, and the market shares compared to competition.

¹⁶ Data provided by Mrs. Nguyen Thanh Thuy of the French Branch, Department of the Tourism, University of Hue

¹⁷ Data provided by Mr. Luong Trung Hieu of Saigon Tourist – See Appendix 1

¹⁸ Data provided by Mr. Do Ngoc My, of the University of Da Nang

7) Use of Internet at ends to promote the destination or compromise

One of the principal Vietnam gaps come from the use of the Internet mainly for communication and documentation¹⁹. Many companies do not develop enough their Internet website in order to increase their market share. There are only the large hotels' websites which are functional²⁰.

Currently, the largest tourist company in Vietnam is Saigon Tourist. This company is described in the next paragraphs. Let us stress that its Internet website²¹ allows the reservation of hotel rooms.

In parallel, Hô Chi Minh City created an Internet website²² for the city promotion, but it is not very functional yet. Instead of allowing hotel room reservation online, this website directs the Net surfers, by hyperlinks, towards various hotels Internet website. The team promotion is working with a Japanese firm for the creation of an Internet website more operative, in order to better meet the customers' needs. This team collaborates with partners in E-marketing because the Human Resources have not been developed enough or did not have required competences. An information technology division will come to correct this gap when setting-up²³.

The VNAT, for its part, developed several Internet websites, of which each one has its specific utility:

- www.vietnamtourism.com : the promotion of the country and tourist customers;
- www.vietnamtourism.gov.vn : the company policies;
- www.dulichvn.org.vn : an update news bulletin (in Vietnamese only);
- www.vietnamtourism-info.com : free information on the field for the companies. To obtain more complete information, the interested parties must spend a certain amount.

Finally, a very new Internet website, at present in construction, allows tourists to find hotels in all the country: www.myhotelvietnam.com . This website is, at present,

¹⁹ Data provided by Mr. Nguyen Duc Tri of the Faculty of Commerce and Tourism, University of Economics Hô Chi Minh City

²⁰ Data provided by Mr. Tran Quang Minh of the Department of Tourism of Hue

²¹ Source : www.saigon-tourist.com

²² Source : www.tourism.hochimincity.gov.vn

²³ Data provided by Mr. Ta Nam Binh of the Department of Tourism, Hô Chi Minh City

testing, and more than 300 hotels are indexed there. The hotel owners do not have to pay to announce themselves there, but they will have to do so when the website will be entirely functional, at the end of 2006. The VNAT also took part in the construction of specific Internet websites like those of Halong Bay (www.halong.com), Nha Trang (www.nhatrang-travel.com), and Saigon Tourism (www.saigon-tourism.com)²⁴.

It is possible to order on the Technology and Information Tourism Center (TITC) website CDs which help to get better information about the country. It is a paying service (by banking transfer). Let us note that the customers for this product are mainly European.

Definition of a national strategy/Level of partnership

We wish to specify that it was difficult to get documents and to obtain information concerning the national strategy of Vietnam tourist development. Very often, we were referred to the National Administration of Tourism website, which has very few information on this subject.

However, a summary of the tourist development strategy of Vietnam for the years 2001 to 2010 was given to us. Here are the principal points, which give a good outline of the tourist development orientations taken by the National Administration of Tourism, more commonly called the VNAT, of its English acronym Vietnam National Administration of Tourism²⁵.

The VNAT concerns the government and its official function is to manage the tourist activities in all the country, with regard to the programming, the planning, the international co-operation, the training management, the research, the opinion promulgations, the policies, and the payments in the tourism field, and the application of the contracts.

²⁴ Data provided by Mr. Nguyen Hong Ha of VNAT

²⁵ See diagram in appendix in order to better understand how tourist industry in Vietnam is articulated

The tourism development strategy in Vietnam discuss about many points that would be too long and useless to enumerate here, since the summary of the strategy on which this text is based is presented in appendix.

However, we wish to mention the most important elements and those which are linked to this report's subject. We do not follow the order of the text written by the VNAT, but we organize the principal ideas of the strategy according to various points: strategy's objectives, Vietnam tourist markets, tourist investments, tourist development and planning, promotion and marketing, human resources, regional development, laws and payments, and information technology. Under these great points, we mention the broad outline of the strategy, as well as the information which we collected on the ground and during our research.

1) General Objective

The objective of this strategy is to develop tourism so that it is fully integrated as a definite economy sector. For that, Vietnam puts on effective exploitation of its natural, ecological, cultural and historical conditions. Moreover, the country is based on international co-operation and assistance, so that the tourism development contributes to national industrialization and modernization. Vietnam wants to become a tourist center which will be classified among the most attended countries, from here 2010.

To achieve this goal, the National Administration of Tourism stresses six points:

1. The creation of precise Vietnamese tourist products.
2. The exploitation of existing or potential markets, including domestic market.
3. The development of skills and knowledge in order to form highly qualified employees.
4. The development of the sector of tourism sciences and technology in order to improve the sector effectiveness in business and management.
5. The integration of various areas and the Vietnam position compared to the rest of the world.
6. The increase in national management capacities, to make an effective and suitable use of resources and an environment which can ensure a durable tourism development.

2) Specific Objectives

The Vietnamese objectives are to increase by 11% to 15% the average share of the tourism industry in the GDP for the 2001-2010 period. The 2001 objective to reach 3 to 3,5 million international arrivals into 2005 was carried out since this number was from 3 467 757, end of 2005. Moreover, in 2001, one envisaged incomes of 2 billion dollars for 2005, and those reached 1,89 billion.

For 2010, Vietnam envisages to reach from 5,5 to 6 million international arrivals, and from 25 to 26 million domestic tourists. Incomes generated by the industry should reach the 4 or 4,5 billion dollars. In addition, the 2001 development strategy envisaged 15 to 16 million domestic tourists for 2005, and 15 000 000 were listed.

3) Tourist Markets

Vietnam pays detailed attention to the other countries of the Association of SouthEast Asian Nations (ASEAN): China, Japan, the Republic of Korea, the United States, France, Germany, and England. The country is also interested in other markets such as the north of Asia countries: Northern Europe, Australia, New Zealand, the Commonwealth Countries, and Eastern Europe.

Its ten principal transmitting markets in May 2006 are China, South Korea, the United States, Japan, Taiwan, Cambodia, Australia, France, Thailand, and Singapore.

Table of the international arrivals in Vietnam in May 2006²⁶

By country of consignment		
Market	Number of visitor (in person)	Variation of the number of visitors compared to the year 2005
China	264 870	- 20,7%
South Korea	182 055	+ 45,3%
United States	162 766	+ 23,5%
Japan	146 071	+ 28,5%
Taiwan	115 722	+ 2,1%
Cambodia	95 375	+ 26,5%
Australia	71 469	+ 20,2%
France	56 255	+ 1,6%
Thailand	51 370	+ 65,6%
Singapore	39 690	+ 41,3%

Five years ago, the targeted markets were France and North America. Today, the prospects changed and Vietnam more precisely aims the Chinese and Japanese customers and, in a more general way, the countries of Asia.

As the table shows it above, the largest transmitting market of Vietnam is China with 264 870 visitors in May 2006²⁷. In 2005, China represents 23% of the international arrivals, followed by the United States (10%), then by Japan (9%), Korea (9%), and Taiwan (8%)²⁸. The principal competitors of Vietnam at the regional level are Indonesia and Thailand for balneal tourism, and China for cultural tourism.

With regard to domestic tourism, the National Administration of Tourism considers this creneel as a development advantage which can allow the improvement of the living standard as well as intellectual and spiritual abilities of the local populations. In addition, domestic tourism is also used as a strategy to deal with the hollow season. As much as other countries, Vietnam uses the markets' diversification to fulfill the

²⁶ Table available on Internet site of the VNAT, www.vietnamtourism.gov.vn

²⁷ Statistical data of the VNAT Website

²⁸ Data provided by M. Luong Trung Hieu of Saigon Tourist – see Appendix 1

differences in custom according to seasons' and hopes on domestic and regional tourism to fulfill the earning loss in tourist season.

4) Investments

The strategy stipulates that investments must come from the State budget and sources coming from the foreign capital. The foreign capital decreased after the 1997 Asian financial crisis, but starts again to increase since 2003. The direct foreign investments slightly increased by 4,2% in 2005 compared to 2004. *Foreign Direct Investments* (FDI) of last year were 5,9 billion dollars and, on March 20, 2006, one already counted 6162 projects financed by the foreigner, with the recorded capital of 52,6 billion dollars²⁹.

Vietnam tries to create favorable conditions to attract the direct investment abroad in order to develop the tourist offices and other higher quality products.

5) Tourist Development and planning

The National Administration of Tourism puts, as first priority, the importance to plan tourism in a rational way, so that the urban development is done in harmony with the durable tourism concept.

For this purpose, the VNAT establishes a development plan every five years. This plan acts as bible for the rest of the tourist institutions. The regional organizations, such as the departments of tourism of the people's committees, are consulted for the development plan, and then have the mandate to follow their broad outline. However, they can adapt it according to their needs and create their own installation plan and tourist development by consulting, as a preliminary, the sub-area organizations of the private and public sectors.

²⁹ Figures drawn from the article entitled "Le Vietnam vise 47 milliards de dollars de capitaux étrangers d'ici cinq ans", March 16, 2006, http://www.french.xinhuanet.com/french/2006-05/16/content_253761.htm, copyright 2004, News Service XinHua

The provincial and municipal governments have more and more responsibilities with regard to the planning, the development, and the tourism management. Generally, the local government is responsible for the tourism management in its zone, which includes tourist planning for the locality, the statistics' collection, and the coordination of the tourist development on a local scale.

Today, the department of tourism of the people's committee, either large province or large city tries to gather companies of the private sector around the project to improve the image of Vietnam. For its part, the government contributes by giving the possibility to the tourist companies to elaborate development plans which respond to the international conditions and standards, so that the international co-operation carries out on similar bases.

6) Human Resources

In its strategy, the VNAT makes state of its human resources in tourism and its desire to improve technical and material bases which are at its disposal. Vietnam wishes to work out and establish a development plan of human resources in tourism. It wishes to increase the quality of the trainings specialized in tourism thanks to a more suitable personnel structure. This improvement would be made by a broad outline establishment that the State and the tourist companies should follow as regards of human resources formation.

In addition, the National Administration of Tourism recommends increasing the number of trainings in alternation, which requires certain coordination between the formation establishments and the companies which perceive funds coming from the State budget.

In terms of formation, Vietnam has the possibility to have professors trained by international teachers, which ensures them of the update working methods. On the other hand, educational establishments such, as the universities, miss equipment and technical support, which constitutes a weakness.

The formation establishments count on the language trainings, more specifically Chinese, Japanese, English, and French. Moreover, they offer courses with directed option towards specific markets, allowing the students to obtain a specialization.

7) Promotion and marketing

Vietnam wishes better cooperation with the international for the promotion of the country's tourist activities, as well on the spot as abroad. It wishes to establish and fix its tourist profile on the international scene. Moreover, the National Administration³⁰ wishes to make the population aware of the great part tourism plays in the national economic development.

Until now, the image of Vietnam in the foreigners' view was badly defined. The potential visitors and tourists had in mind the vision of a country which knew the war. Vietnam had problems to establish her position on the tourist market, but the adoption of the new logo and the slogan "*Vietnam, the Hidden Charm*" confirms a promotion based on the country cultural and historical heritage.

However, Vietnam does not seem to have worked out the strategy of consumer loyalty development. The speakers whom we spoke to talked about ecotourism like principal product of consumer loyalty development and the important role the tourist the representatives play on the spot and in the foreign countries.

In addition, such as already mentioned, Vietnam is a destination which mixes very well with the close destinations, such as Thailand, Cambodia, and Laos. The tourists often visit more than one country in Southern Asia-Pacific area during their stay. This is why Vietnam wishes to consolidate and develop her bilateral and multilateral relations with the international organizations and the countries which hold experiment and expertise in the tourist development.

³⁰ By National Administration, one understands Vietnam National Administration of Tourism (VNAT)

8) Regional Development

Tourist Vietnam is divided into three zones. The first is the north zone which extends from Ha Giang to Ha Tinh province. Ha Noi is the principal urban tourist of this central zone, just like the triangle of Hanoi - Hai Phong – Ha Long. The typical tourist products of this zone are the culture, the ecotourism, and the balneal tourism.

The second area is that of the northern center. It covers the province and the towns of Quang Binh, in Quang Ngai, whose central points are Hue and Danang, and the tourist zone of Quang Tri-Hue-Da Nang - Quang Nam. Its principal products are sport, balneal leisure, cultural and historical tourism.

The third area is the southern center and the south. This area extends from the province of Kon Tum to Ca Mau. The area center is Hô Chi Minh City, and the tourist geographical area is HCMV - Nha Trang - Da lat - HCMV - Can Tho - Phan Thiet. The principal types of tourist products are visits of approvals, the mountain, panoramas on the coast southern centers, and plains of the center, Mekong and its channels, and the ecotourism.

The objectives of this point are to emphasize the tourist products of each area as well as the whole country. One mentions more precisely there the adoption of a tourist promotion plan for certain key sectors, such as Hanoi, Hai Phong, Quaung Ninh, Nghe An, Hue, Da Nang, Quang Nam, Khanh Hoa, Da lat, Ninh Thuan, Vung Tau, HCMV, Ha Tien, and Phu Quoc. Moreover, Vietnam envisages making the promotion of certain tourist roads which link various strong tourist regions.

9) Laws and payments

Vietnam created a legal environment to manage the tourism activities and to prepare the conditions necessary to attract the foreign investments. *Tourism Ordinance*³¹ was adopted in 1999 with the goal to regularize the tourist activities, to define the rights and obligations of the tourists as well as organizations and individuals who make deals in the tourism field, within the Socialist Republic of Vietnam. Under this point, the VNAT envisages to decentralize the responsibilities for management and to simplify the procedures related on the tourists' arrival and the tourist companies' development.

Ten years ago, it was difficult to obtain a license to open a company in the tourism field, whereas it is enough now to one or two weeks. The government does not financially support small and medium-sized enterprises, but tries to facilitate the administrative steps. It wishes to reach a balance between the private and the public sector and sells the shares, which it holds in the State companies to private contractors, which falls under the process of institutions' privatization.

The representatives of various companies we could meet assure us that large efforts were made to facilitate the procedures of tourists' entry in Vietnam. The Scandinavian countries do not need anymore visa to return to Vietnam and discussions are in process for other countries, such as France.

In addition, the administration simplified the procedures by authorizing the Viet Kieu to request visa to the customs during Têt, which, according to our sources, should be generalized soon to the whole travelers all the year.

The reception and the integration of the tourists are significant points which are greatly taken into consideration by the National Administration of Tourism, because they have not only an important place in the exchange agreements between Vietnam and the United States, but also in the future adhesion of the country to the World Organization Trade (WTO).

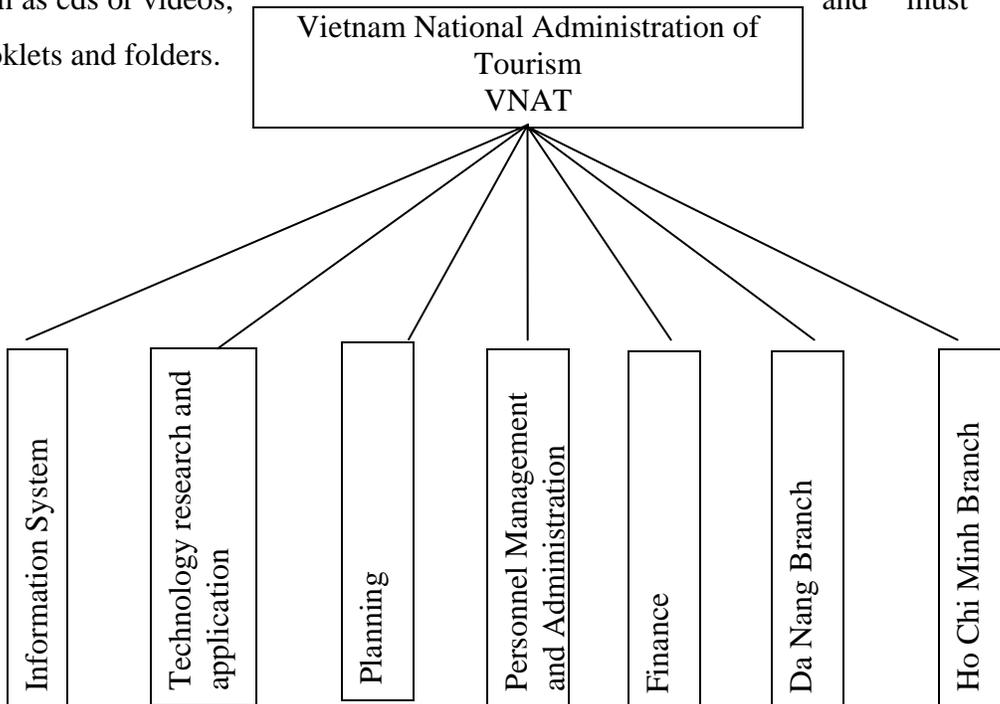
³¹ Available on the VNAT Website : http://www.vietnam-tourism.com/vietnam_gov/e_pages/dulich/PhaplenhDL/pldl_phaplenhdl.htm

10) Information Technology

The National Administration of Tourism gives detailed attention to the application and the development of information technology. For this purpose, its Tourism Information Technology Center is charged to develop the tourism system in Vietnam (Intranet/Internet) and to apply information to the activities related to the tourism field thanks to the creation of the hotel management and tourism program.

This organization, which is directly controlled by the VNAT, is composed of seven departments: the Department of the information system, the Department of technology research and application, the Department of planning, the Department of administration and staff management, the Department of finances, the Da Nang branch and, to finish, the Hô Chi Minh City branch.

TITC is charged to promote tourism. It must use Internet sites to propose the tourist attractions of the country and must also present promotional multimedia tools, such as cds or videos, and must publish booklets and folders.



There are currently four websites available for the Net surfers, which referred on the principal search engines such as Altavista, Google, and Yahoo. We already mentioned them in the above context, but we wish again to quote them in order to facilitate the comprehension of the TITC operation.

www.vietnamtourism.com was the first Vietnam tourist Website. The three others have been developed from this one. The site is available in six languages: Vietnamese, Japanese, Chinese, French, English, and German. Moreover, each webpage is personalized according to the Net surfer's country. The webpages' contents vary according to the target market. In a general way, TITC collects statistics on the websites quality use, which allows countries to know where the Net surfers, who consult the web page, come from.

www.vietnamtourism.gov.vn is the site on which one can find the statistics of tourism and obtain information concerning the VNAT and various projects, current laws and payments.

www.dulichvn.org.vn is a site available only in Vietnamese and that has as a target the domestic area. The site diffuses news bulletins and keeps Net surfers informed of the innovations in the tourism field.

www.vietnamtourism-info.com is the site which disseminates information on the products tourist offered by Vietnam.

TITC is, in this moment, in probation period to test a new website: www.myhotelvietnam.com. This site will allow hotel reservation online. It will act as the first step towards the creation of a destination management system. However, the persons in charge for TITC mentioned that they had certain gaps in terms of human resources and technical disadvantages which do not enable them to consider the destination management system (DMS) in the future. It should be noted that TITC does not operate

in partnership with Internet Service Provider (ISP) and that it must still buy the services it requires, which constitutes a brake with its activities development.

This new site allows, for the moment, make hotel room reservation. It is, however, impossible to carry out transactions online because the banks require a signature. The current banking structure does not allow to control the online transactions, the dong not being exchangeable on the international markets. It uses a program which checks the credit cards' validity, but the payment cannot be carried directly out.

The E-commerce is at its beginning in Vietnam. The Vietnam e-commerce report 2005³², appeared on March 1st, 2006, confirms the limits of the E-commerce development and the slowness of the infrastructure installation necessary to the expansion of this type of commerce. The report more precisely underlines the problems of online payment, safety, and the interchangeable electronic data.

To return to the new site www.myhotelvietnam.com, put online by TITC, the Net surfer fills a reservation request there and the server returns a confirmation email to him/her. The members of the site can adhere free and are responsible for the information which is disseminated on their subject. TITC is not able, at present, to check the information quality, but plans to do it in the future.

To conclude, TITC carries out other provinces websites and cooperates with their departments of tourism. The provinces provide information and TITC took the responsibility to create the website. Thereafter, the concerned province is given the responsibility to manage the contents of its site. With regard to the hotels, TITC assists them in the creation of their website, according to their budget because the small private hotels have few means. The center offers different fixed prices to help the hotels according to their needs and their budget.

Unfortunately, the Internet Service providers, who, mostly offer a service of Website creation, are less expensive and difficult to compete.

³² Article "Vietnam e-commerce report 2005 released», Internet site <http://www.mot.gov.vn/moten/render.userLayoutRootNode.uP>
The Vietnam e-commerce report 2005 can be downloaded on the site www.mot.gov.vn

Sub-area Branches

1) Tourism in Vietnam

Firstly, it is important to present the regional tourism structure in Vietnam. VNAT (Vietnam National Administration of Tourism) is on top. It is an organization which plans the tourist development for the entire country. On a regional scale, there are 63 cities and provinces. In each of them, regional decisions are caught, either by the people's committee of the city, or by a department of tourism especially created for this purpose.

The central government dictates the broad outline of the tourist plan and it is a responsibility for each area to take care of its great functioning as envisaged by the VNAT. The VNAT also allocates tourist budget to the areas according to their different requests.

2) Saigon Tourist

Saigon Tourist is a public company which belongs to the Department of tourism of Hô Chi Minh City. It is a leader in the tourism field. It has hotels, restaurants, travel agencies, attraction parks, several transport companies (planes, taxis, and cruising boats). It also makes import/export, and it is present in banking field, food industry, and construction industry. It also has several "joint-ventures" in other fields. The VNAT has a right to keep an eye on its activities, but does not have access to its accountancy. All the profits return to Hô Chi Minh City.

Saigon Tourist is present on Internet (<http://www.saigon-tourist.com/>); its site, almost complete, in English and Vietnamese, offers several possibilities to users. Practical information on Vietnam is given there, such as the geography, the climate, the entry visa, etc.

One finds there a list of restaurants with description and addresses, as well as addresses of tour operators (TO). One also reaches information on possible activities in Vietnam, such as attraction parks, golf courses, discos and casinos, all belonging to Saigon Tourist. News concerning tourism is also posted there as well as a detailed description of hotels and resorts.

Moreover, an online reservation service is accessible for most of the hotels appearing in the site. The payment will obviously not be taken from a credit card, but a checking of the credit card validity will be made. The reservations by Internet represent 7% of Saigon Tourist incomes and its hotel reservations by Internet represent 5% of the total room reservations³³. When one compares this rate with that of the private hotel Sofitel, in Hô Chi Minh City, which is 15% (a triple value), immediately one understands the Vietnamese public companies loss of earnings.

The Saigon Tourist leaders mentioned that important negotiations are now on process with Vietnamese banks to regulate the reservation problem by Internet which affects not only this company but also all companies of the country.

3) Existing establishments

The departments of tourism in region are not very advanced as regards of ICT. Although they have a Website, none offers online reservation for reasons already mentioned. Some of these departments do not even have basic customers' data and, in general, although the leaders know the ICT, they do have neither the qualified personnel, nor the funds necessary for their formation.

The departments of tourism's Internet sites, for those concerned, have many gaps. They are in general very badly referred, of poor quality, slow, in very few languages, either in Vietnamese or in English, and only very little answer the users' questions. They contain some information of lodging type, restoration, travel agencies, and sometimes, required visas, exchange rate, etc.

Unfortunately, the departments of tourism do not have enough funds to retain professional services to build their Internet site. For this reason, they use tools which are at their disposal and which help them obtain the results that we know.

4) Possible or considered establishments

If the discussions with the banks are positive, the Vietnamese companies will soon be able to add reservation by Internet to their website, which will enable them to have a dynamic Internet site. Information could, then, be collected at the same time, since

³³ Data provided by M. Luong Trung Hieu of Saigon Tourist – see Appendix 1

they would have access to personal customer reservation data. Thanks to this type of information, various departments of tourism will be able to target the customers and, thus, to center their Internet site on customer specific needs.

A partnership between a department of tourism and a company specialized in creating Internet sites would be advantageous. The department of tourism could take advantage of this company expertise and, in return, make publicity for this one. Thus, the regions would have more professional Internet sites, ready to meet the user's needs.

Opportunities

Vietnam knows an annual increase of 13% in the tourist field. The development is fast, but it remains a long way to reach the desired development services. The population is conscious of the benefit tourism gives, and knows that its development would contribute to the increase in employment³⁴.

The number of students in tourism, in Vietnam, also increases. At Hô Chi Minh City, more than 2000 students study at the University of Economics. The courses in information and communication technology need to be more developed so that the students master the new technology field. Thus, the country will have more tools to offer technology necessary for the creation of a destination management system³⁵. As becoming a new tourist destination, Vietnam will be able to be known much more easily on an international scale.

The French branch of the Department of Tourism, Hue's Province, also wishes to concentrate its efforts on a new research section which will be operative in the next years. This branch prepares tourism licenses in specialized French courses. This French branch, contrary to other educational establishments, offers a large variety of technological courses³⁶.

The possibility to offer Internet reservation and payment service constitutes an opportunity. The banks will have to adjust their policy and offer this service. The country

³⁴ Data provided by Mr. Nguyen Hong Ha of VNAT

³⁵ Data provided by Mr. Nguyen Duc Tri of the University of Economics Hô Chi Minh City.

³⁶ Data provided by Mr. Nguyen Thi Thanh Thuy of the French Branch, Department of Tourism of Hue

should know an increase in the reservations and incomes. However, authorities are aware that several years can pass before the system is set up³⁷.

Difficulties encountered

1) Difficulties encountered to reach the final tourist

The tourists' accessibility is not easy and slows down the development of companies that work in the field. Tourist companies, for example tour operators, hotels, or travel agencies, do not have any capacity and can only express their dissatisfaction and their desire of change. To enter in Vietnam, it is still necessary to have a visa which can only be obtained to the custom post and its cost is high. As mentioned above, Vietnam tries to solve this problem; it already concluded agreements with the Scandinavian countries so that these countries' citizens are exempted of this formality. Discussions are actually in process for other countries' exemption. Currently, a Vietnamese visa costs from 90 to 120 USD, depending on whether it is a visa with simple entry or multiple entries.

Moreover, the tourist companies encountered difficulties to reach final tourist, because of small qualified staff in marketing and lack of expertise in information technology. The companies we met shared with us their difficulties in recruiting, and we could note that universities have a great lack of means. Today, companies, just like formation establishments, do all they can with their means. The Department of tourism of Hô Chi Minh City simply confessed to us that it cannot improve its Internet site, for the reasons above, and it does not have, for the moment, the means to send a team member in formation. Thus, the companies wait until things change by themselves.

In addition, we noted that the language trainings and the English master are still very weak in certain areas. Most of young Vietnamese speak English, and tourist guides speak perfectly several languages. However, apart from the tourist paths, in public transport in particular, it is more difficult to be understood in another language but Vietnamese.

³⁷ Data provided by Mr. Nguyen Hong Ha of VNAT

2) Role and importance of tour operators

Tour operators are the first reflection of the Vietnam tourist industry, which the tourists perceive. When one gets information before departure, he/she intends to hear about the local TO, such as either Sinh Café or Kim Café, very numerous and competitive. Most of displacements, if public transport is not borrowed, are done through their intermediary.

They are the first organizations to contact the tourists and to try to have their trust. The TO, in their joint venture, also have the mission to have the trust of the customers abroad.

In addition, TO also have the role to develop tourist attractions, which are indicated in the tourist development strategy written by the VNAT. Their task is to emphasize these attractions and to make them available to the public.

3) Data-processing Infrastructures, internal cover, and data-processing tools availability

It exists, in Vietnam, five Internet service providers (ISP), with a strong competition, and one Internet access provider.

Vietnam Data Communication (VDC) represents the backbone of the Vietnam Internet distribution system and is the only Internet Access Provider. VDC is controlled by the Department General of Post and Telecommunications of Vietnam (DGPT) and is the company which manages the cable network, the optical fiber, as well as the servers.

**The markets' share of the 5 principal Internet Service Providers in Vietnam,
from May 2003 to May 2005³⁸**

Rank	ISP	Market share May 2005 (%)	Market share May 2004 (%)	Market share May 2003 (%)
1	VNPT	48.05	59.3	61.7
2	FPT	29.70	22.6	23.5
3	Viettel	11.02	2.5	1.2
4	SPT	5.00	6.9	4.0
5	NetNam	4.70	7.0	7.2

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The VNPT holds a market share of 48,5%. Vietnam Post and Telecommunication is a public company which depends on the Department General of Post and Telecommunications of Vietnam. Most of other Internet providers depend on it, because the network belongs to it.

FPT is a private company which holds 29,70% of the market shares. Its capacity to provide Internet services depends directly on the VNPT, because it uses the same cable network.

Viettel, which holds 11,02% of the market shares, is the third ISP in Vietnam. This public company is completely independent of the VNPT because it uses the military network.

The fourth ISP names SPT. It holds 5% of the market shares, and is a joint venture company which belongs partly to Saigon Post Telecom. The last more important Vietnam ISP is NetNam. This company holds 4,7% of the market shares, and is a private company which depends on the VNPT.

There is also EVN Company, an electricity company which has just launched out in Internet, but it does not appear yet in the five Vietnam ISP table. Its creation is recent, and it does not yet have expertise in this field. In addition, other Internet service

³⁸ Data provided by Mr. Vu Thi Thuy Lan of FPT Company

providers, which do not appear in this field, try to work without the VNPT, preferring to go through satellites in order to be more independent.

Number of Internet subscribers and users in Vietnam, from 2000 to 2005³⁹

Year	Subscribers	Users
2000	80 000	500 000
2001	134 000	1 000 000
2002	174 000	1 300 000
2003	466 000	1 900 000
2004	1 165 000	4 700 000
2005	2 779 000	7 504 000

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In May 2005, the subscribers' number with a fixed Internet price was 2 779 000, while the users' number was 7 504 000. The difference between the number of subscribers and users is explained quite simply by (still) high costs of an Internet subscription. The Socialist Republic of Vietnam still forms part of the three communist countries in the world, and the government tries to control the Internet access by applying raised rates with dissuasive effects.

Let us note that 14,75% of Vietnamese citizens use Internet, but not necessarily at home. Many people prefer going to Internet coffees where the connection rates vary from 5000 to 15 000 dong per hour.

An ADSL connection (Asynchronous DIGITAL Subscriber Line) requires approximately 50\$ of installation expenses added with a monthly fixed price which can vary from 2 to 10\$, depending on the connection speed. There are also unlimited fixed prices which cost from 250 000 to 2 000 000 dong.

Vietnam was connected for the first time in 1997, and ADSL appeared in 2003. Today, 47 cities out of 63 have access to ADSL and it is possible to find a high speed connection in all the Vietnam tourist zones. The international Internet connection capacity in May 2005 was 2,301 Mbps.

³⁹ Data provided by Mr. Vu Thi Thuy Lan of FPT Company.

However, it is necessary to mention that certain districts of the large cities do not have ADSL yet, because of cables' shortage. In the same way, the connections' interruptions, due to the network saturation, cuts of electricity (occasioning by a lack of electric wire), and density of cities are commonly frequent.

International Internet connection capacity ⁴⁰

Time	International Internet connection capacity (Mbps)
12/2000	24
12/2001	61
12/2002	145
4/2003	210
12/2003	1.038
6/2004	1.096
12/2004	1.892
5/2005	2.301

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In addition, at the rush hours, the Internet congestion, unfortunately, slows down connections and the remote loading speed. Very often, the user is obliged "to bear he/she troubles patiently", while waiting for the webpage is downloaded. Indeed, connection between Vietnam and international Internet are congested. It seems that the government tries to solve this problem by increasing the band-width. In 2003, certain signs showed that the economic development started to be disturbed by "Internet stoppers".

For the moment, industries start to connect, but problems could worsen when the online public services and the electronic commerce enter fully in activity⁴¹. At the time of our talks, FPT and VDC companies, however, mentioned that with new Wi-Wax technology they are testing, the networks would improve. VDC plans to use this

⁴⁰ Data provided by Mr. Vu Thi Thuy Lan of FPT Company.

⁴¹ Confirmation drawn from the article entitled " Internet Vietnam: Les autoroutes de l'Informatin souffrent d'embouteillages!", June 3, 2003, published on the Agence universitaire de la francophonie website : http://www.vn.refer.org/vietnam/article.php?id_article=125

technology to exploit the 3G system⁴² which, once in place, will be only exploitable by three still undetermined companies.

With regard to other services provided by the ISP, all do from design to website conception. The Netsoft Company, that we met, offered several services, such as Internet service by modem, ADSL Internet service, and allowance of space services on Internet, WebPages, and domain recording. The State gives tax advantages to companies which develop software and create Internet sites.

As regards of the tourist companies which wish to have an Internet site built, the rates of design vary according to the data presentation. Of course the rates for a dynamic site are higher than those of a static site. It is possible to develop a static site for approximately 100\$, while the creation of a dynamic site will cost 1000-2000\$. The difference is enormous, and it is easy to understand why very few companies have dynamic Internet site and privilege the basic Websites. The government does not offer any financial advantage to companies which wish to be on Internet, and each one is obliged to fill its needs according to its means. Moreover, the rates for an address and a domain name are approximately 480 000 dong (approximately 30 USD), and the lodging of a dynamic 5 Mb site costs approximately 100 USD per year.

There is no national Internet safety company in Vietnam. However, the companies which wish to make safe their site deal with foreign companies. The major problem encountered by the ISP remains the hacking. This double edge disadvantage puts, in front, positive aspect of the information and knowledge diffusion to a larger audience, but, on another side, touches, in a negative way, the economic repercussions and the profits which could be generated. There is, thus, a good crenel to be developed as regards of Websites security.

⁴² 3G means third technology generation, allows to transmit, at the same time, vocal data and non vocal data (information downloading, email, instant message; it allows also to do videoconference.

Good practices

Although tourism in Vietnam is relatively new, it is on the good way. We noted here some examples of good practices in tourism which Vietnam adopted or will adopt in a closer future. These elements could become examples for other countries that are in the same level of development.

The Government encourages the **development of durable tourism**. It has a long-term vision of the tourist development. It includes in its development plan of 2001-2010 the outlines of the *Agenda 21* and encourages the provinces to be inspired by it.

The government **grants more importance to the ICT** since it has a complete department which is charged to develop the tourism information system in Vietnam, TITC (Technology and Information Tourism Center).

The VNAT has a website available in five languages and personalized according to the user' country. This personalization concept helps to better serve the customers according to their specific needs: www.vietnamtourism.com .

The VNAT currently tests a new Website, making it possible to the tourists **to make their hotel reservations online**: www.myhotelvietnam.com .

The government encourages the **development of small and medium-sized enterprises (SME)**: by facilitating the access to the credit, by building suitable buildings that SME can rent at low cost, by providing them a tourism business news bulletin as well as formations and a business consultation service. Moreover, it supports the innovations in the tourism field by creating associations of hotels, tour operators, travel agencies, and guides. Moreover, the government facilitates the creation of contact networks between the contractors so that they can exchange their experiments and develop entrepreneurship programs in tourism.

The government **encourages the creation of websites** by offering tax advantages to the companies which develop software and create Internet sites. The perceived tax advantages are about 0% of imposition from the 1st to the 4th year of exploitation, about 50% of imposition from the 5th to the 14th year, then about 100% of imposition starting from the 15th year⁴³ .

⁴³ Tax advantages perceived by the Netsoft Company

The government wants to increase the human resources quality in tourism, by offering specialized trainings and by developing a more suitable personnel structure.

Conclusion

The case study on Vietnam very clearly shows the gaps as regards of tourism information and communication technology. Very often, due to lack of resources, either financial or human, the companies drop off their Internet site project, to their great disadvantage.

On the other hand, the government tries now to make things change. Indeed, it will market very soon an Internet site which will finally allows the tourists to make reservation online. This project is a very great step towards a destination management system.

Although E-tourism is not yet very developed in Vietnam, all the concerned actors are conscious of its importance for the tourism growth in Vietnam.

The ICT will allow Vietnam to dissociate its foreign competitors, such Cambodia and Indonesia. Moreover, the installation of a destination management system will help Vietnam reach by itself, in the medium term, the tourist and to take confidence in the development of its industry.

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- Mr. Do Ngoc My, of the University of Da Nang
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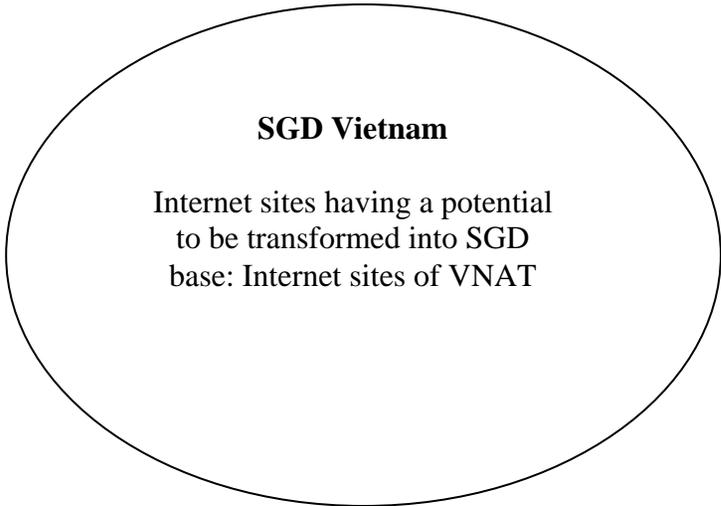
Public sector:
VNAT: Vietnam National Administration of Tourism
VNPT: Vietnam Posts and Telecommunications
Tourist Departments of people's committees
Saigon Tourist

OSBL (non-profit institution) :
Union of the Women

Organisms in charge of promoting:
VNAT
Tourist Departments of People's committees
Saigon Tourist

Other:
IMF and World Bank
Departments of Tourism of Universities

Technology providers:
VNPT (public): owner of the telecommunication infrastructures and Internet provider
FPT and NetNAM (private): Internet access provider
Viettel (public): Internet access provider using military network
SPT (J-V): Internet provider
EVN: (public): owner of the electricity infrastructures of and new Internet access provider



Foreign group Tour and Travel agencies (traditional and online):
Exotissimo
Apex
Expedia
Chanteclerc Tour

Associations and Regroupings:
Association of Vietnam travel agencies

Products and services providers: offer tourist:
24 Airlines transporters (long mails)
6 regional conveyors (Asia)
More than 300 hotels
Express train to link
More than 180 Vietnamese Tour operators

Foreign Investors:
Accor Group
Starwood hotels & resorts worldwide, Inc.
Marriot International, Inc.

International tourist request:
Asia (China, South Korea, Taiwan, Japan, Cambodia, Thailand, Singapore, Malaysia, and Laos)
USA, Canada
Europe (France, England, Germany)
Australia

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