



E-Learning in Vietnam

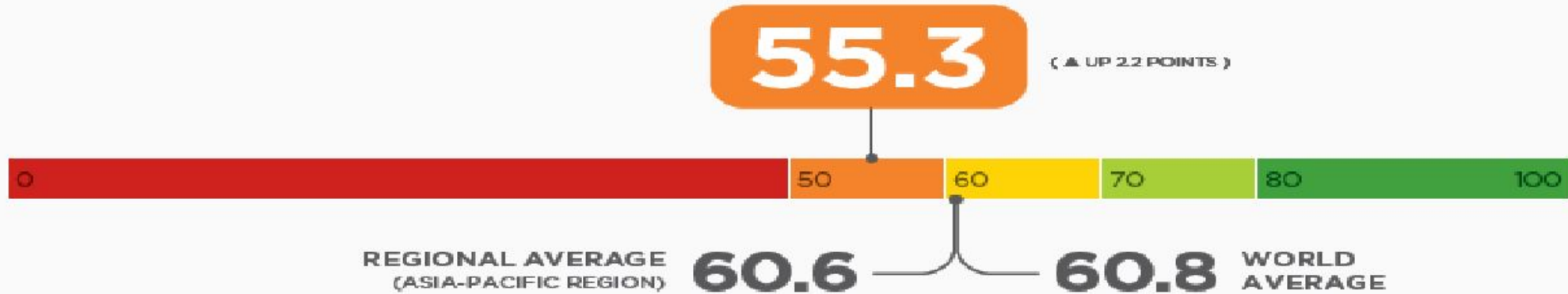
Dr. JENNY DANG

E-Leader Conference

Ho Chi Minh City, 6-8 January 2020

The Overview of Viet Nam

ECONOMIC FREEDOM SCORE

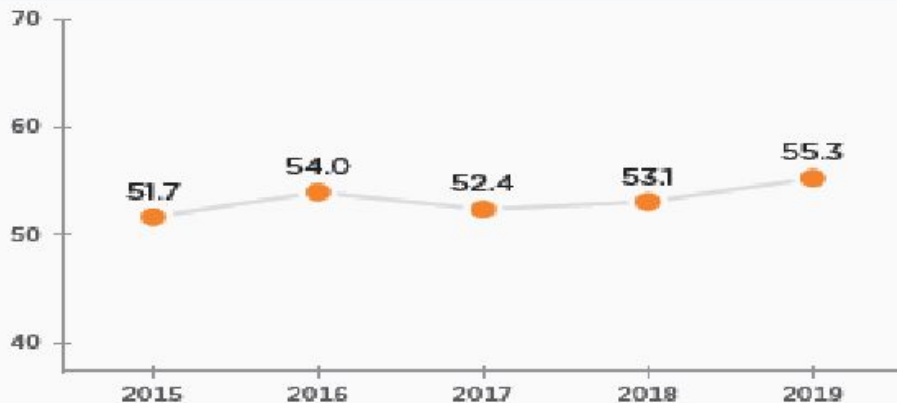


RELATIVE STRENGTHS:
Tax Burden and Trade Freedom

HISTORICAL INDEX SCORE CHANGE (SINCE 1995):
+13.6

CONCERNS:
Investment Freedom and Government Integrity

FREEDOM TREND



QUICK FACTS

POPULATION:
93.6 million

GDP (PPP):
\$647.4 billion
6.8% growth in 2017
5-year compound annual growth 6.2%
\$6,913 per capita

UNEMPLOYMENT:
2.1%

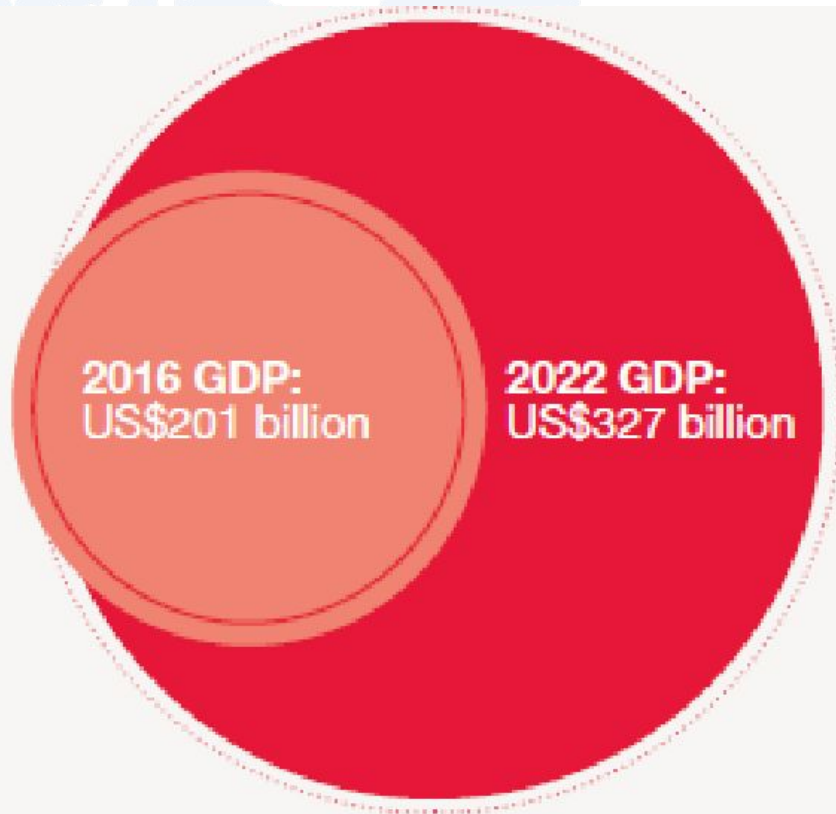
INFLATION (CPI):
3.5%

FDI INFLOW:
\$14.1 billion

PUBLIC DEBT:
58.2% of GDP

2017 data unless otherwise noted. Data compiled as of September 2018

VIETNAM'S ECONOMIC OUTLOOK IS POSITIVE

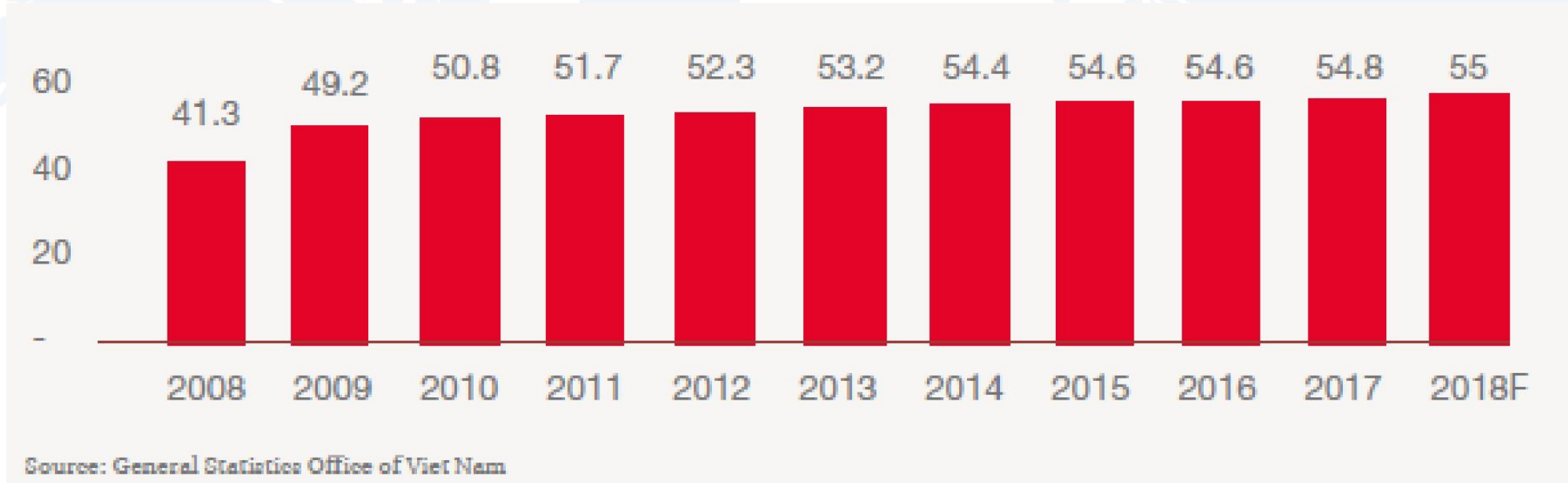


Real GDP growth (2016-2022)

6.2%

Source: IMF WEO Database, cited in PwC's "The Future of ASEAN - Time to Act," 2018

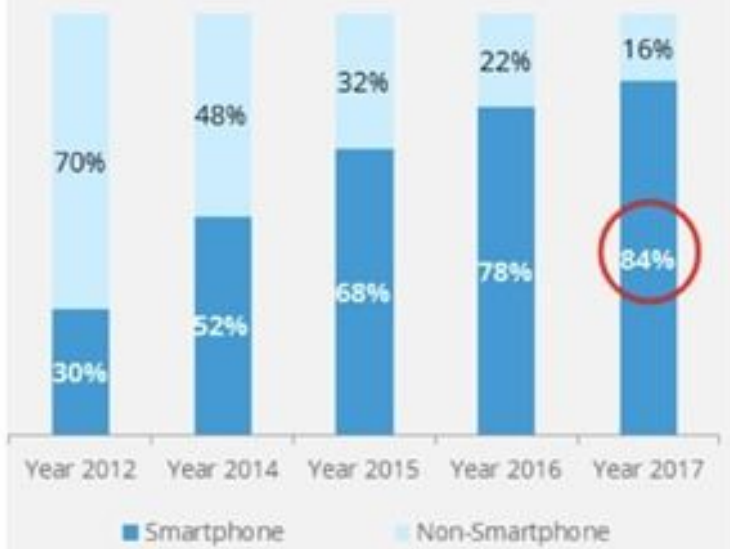
VIETNAM IS EXPERIENCING RAPID DEMOGRAPHIC AND SOCIAL CHANGE



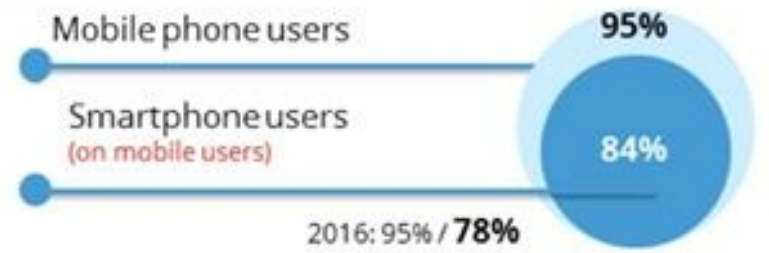
- 70% of the population is under 35 years of age,
- The population is rapidly aging.
- An emerging middle class, currently accounting for 13% of the population, is expected to reach 26% by 2026.

SMARTPHONE PENETRATION IN VIETNAM

% OF PEOPLE USING SMARTPHONE AMONG MOBILE PHONE USERS IN KEY CITIES



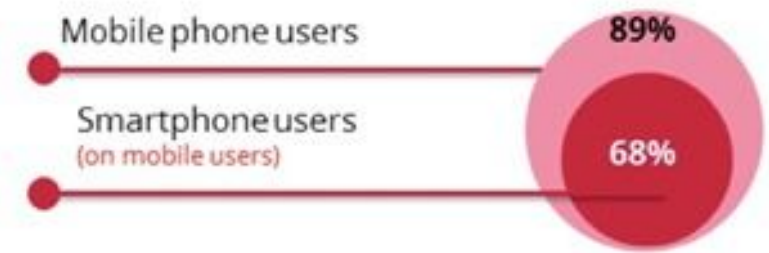
KEY CITIES



SECONDARY CITIES



RURAL



Source: Nielsen Vietnam Smartphone Insight Report, Q4 2017; Key cities: (n=1,882); Secondary cities (n=1,930); Rural (n=2,027)
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Startup Ecosystem Players

Incubators/Accelerators



Pre-seed/Seed



Co-working space



Series A and Series B



Government



Events



Community/Media

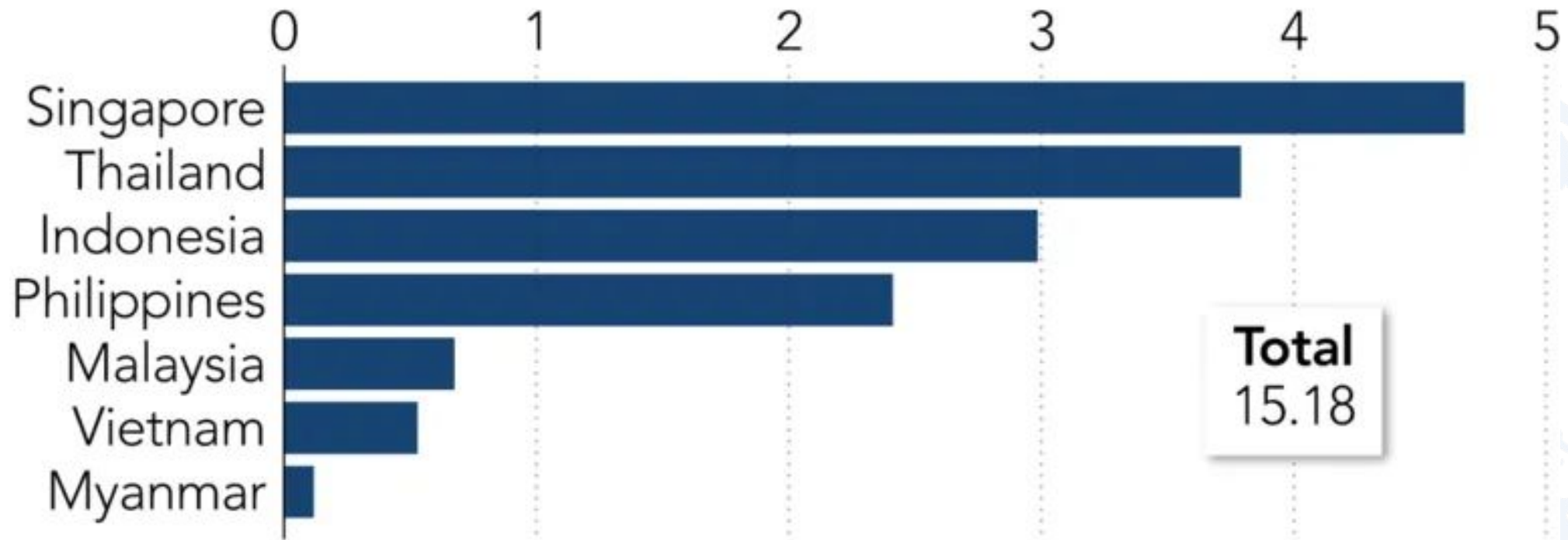


Corporate



Deal value by country

(January-July 2019, in billions of dollars)



Includes private equity, venture capital, corporate investments in privately held companies as well as M&A deals

Source: DealStreetAsia

Vietnam startup fundraising in first half 2019

Company	Industry	Main investor	Funds raised <i>(in millions of dollars)</i>
Tiki	E-commerce	Northstar Group	75
VNPay	Payment	GIC	50
VNG	Online games	Temasek Holdings	29
VNTrip	Online travel agent	Hendale Capital	10
Leflair	E-commerce	GS Shop	7
Elsa	Education	Gradient Ventures	7

Including ongoing fundraising rounds where the amount might be revised in the future

Source: Cento Ventures, ESP Capital

THE OUTLOOK OF EDTECH VIETNAM





TOPICA

LEARN ONLINE, GO GLOBAL

**northstar**

50M



GotIt!



ELSA

yola

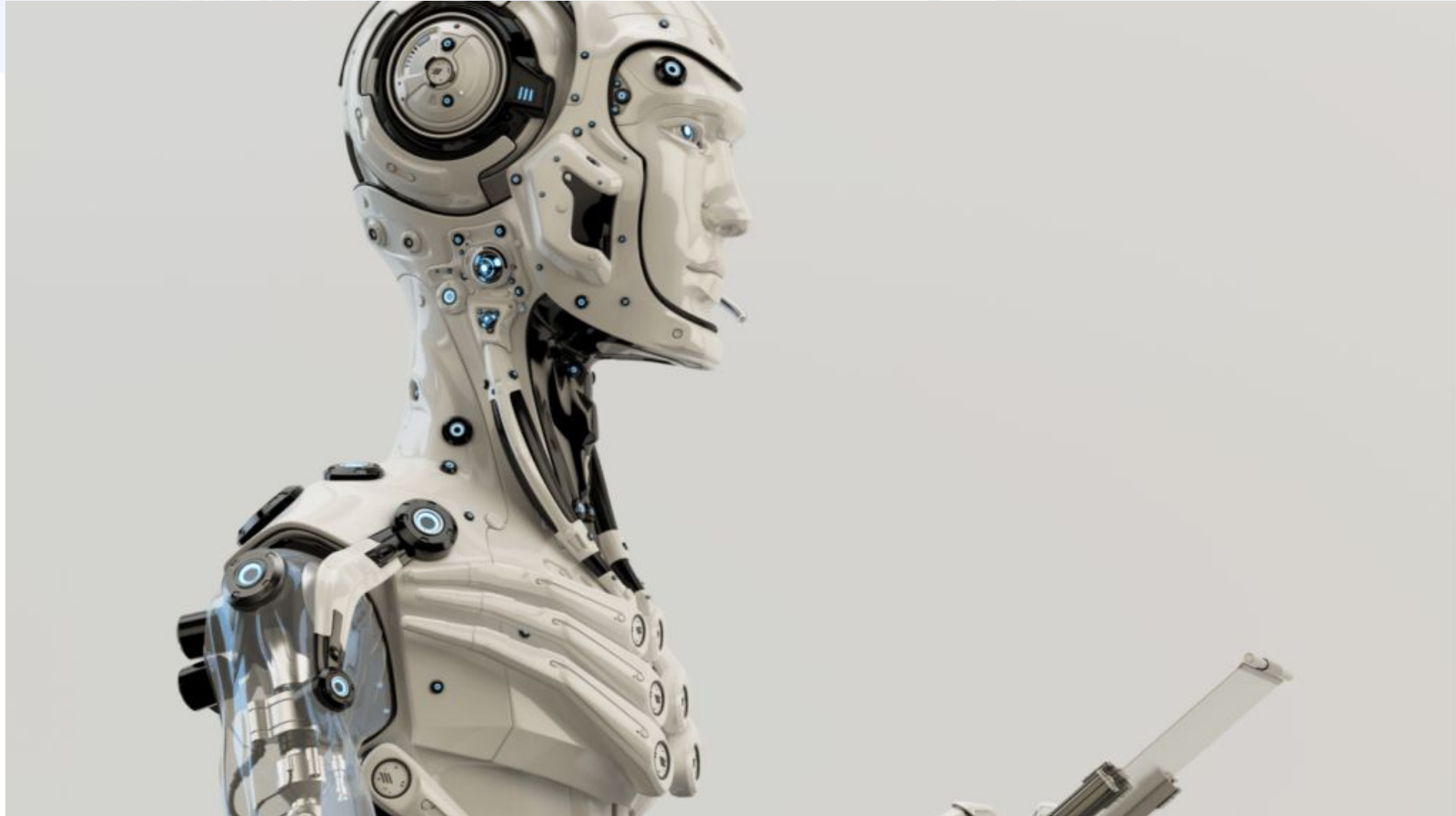


EVEREST
EDUCATION

- GotIt!, recently mobilised US\$12.5 million from some US funds.
- ELSA Speak, has raised over \$15 millions.
- Everest Education raised \$4 million in a Series B
- YOLA, has raised 10 Millions from Kaizen PE

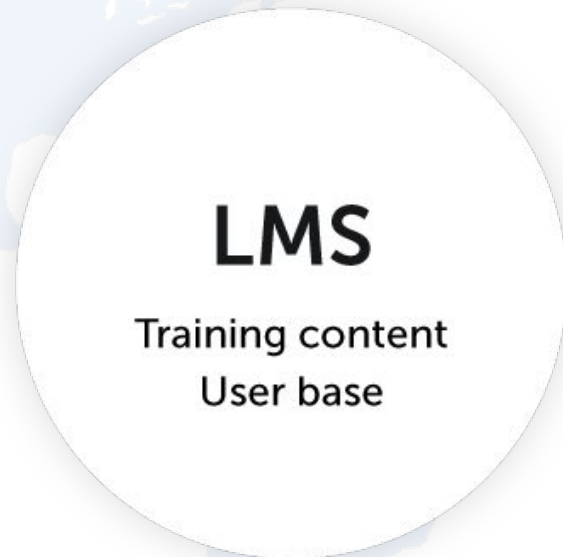


AI-Based Humanlike Trainers

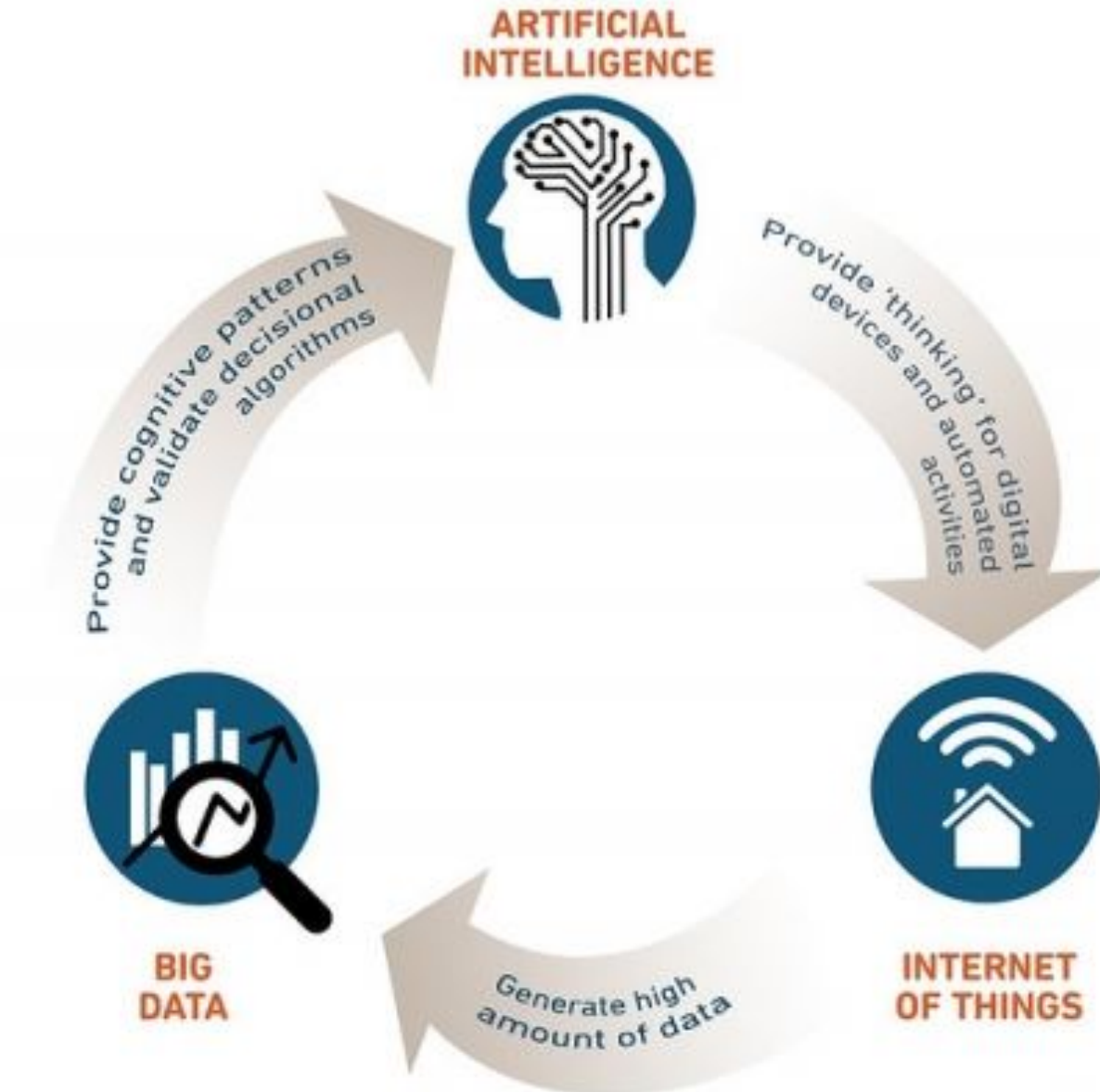


Learning Experience Platforms

- The next level of LMS



Big Data Analytics



User-Generated Content (UGC)

➤ Benefits of User-Generated Content



Build
Trust



Create
Community



Encourage
Engagement

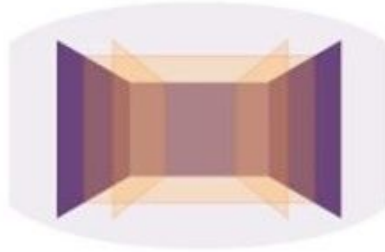


Gather
Insight

AR, VR, and MR

VIRTUAL REALITY (VR)

Fully artificial environment



Full immersion in virtual environment



AUGMENTED REALITY (AR)

Virtual objects overlaid on real-world environment



The real world enhanced with digital objects



MIXED REALITY (MR)

Virtual environment combined with real world



Interact with both the real world and the virtual environment

