

# VIETNAM IT MARKET REPORT

## Developers Recruitment State

**2021**

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## It's time to step into intensive intellectual competition.

From the first outbreak in March 2020 to the present, the IT market as well as the recruitment demand for the information technology industry has gone through many stages, from difficulties to adaptation, then recovery and development rehabilitation. With serious awareness and preparation from the previous wave of digital transformation, accompanied by a positive & adaptable change from government policies, businesses' initiative and relentlessly competitive market background, we are all at a good state of control and balance, with enough sanity to cope with survival and development. As evidenced by many major positive market & social-economic indexes, Vietnam still maintains a positive growth momentum despite the impacts of Covid-19.

However, that is the end of the story and a new chapter has opened right away. As the world has gradually recovered, new policies and strategies have begun to be implemented in every corner. Previous achievements need to be shelved to set the stage for the upcoming intensive race - a genuine intellectual competition, involving all individuals, organizations, communities and government. It is also where we need to put aside default mindset, instead focus on scenarios to watch out for and "new-normal" terms & phenomena in the topic of conversation about business and technologies. Taking advantage of the available superiority & the golden opportunities seized in the past, plus adapting to new trends with sensibility to the market situation, we should choose the right strategies for every action of each individual, each enterprise and government departments.

While surrounding uncertainty exists, synergies among positive growth minds can really help, to turn "threats" into "opportunities", "potentials" into "capabilities" and "intellect" into "weapon" in the scope of global technology digital transformation race.



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# VIETNAM

## OVERVIEW

### THE “NEW NORMAL” STATE



# SOCIAL-ECONOMICS

## POPULATION

**97.58M** (Est. 2020)  
**96.46M** (2019)

2 largest cities: Ho Chi Minh City (8.6M) & Ha Noi City (4.67M)

## GDP

**\$261.9B** (2019)

GROWTH RATE **2.91%** (Est. 2020)

GROWTH RATE **7.02%** (2019)

Top 40 largest economies in the world & 4<sup>th</sup> in ASEAN.

## GDP PER CAPITA

**\$2,779** (2020)

MORE \$64 COMPARED TO \$2,715 (2019)

**DOUBLED** COMPARED TO \$1,331 (2010)

## LABOR FORCE AGED FROM 15 YEARS AND OVER

**54.6M** (Est. 2020)

DECREASED BY 1.2M COMPARED TO 2019

## LABOR FORCE IN THE WORKING AGE

**48.3M** (Est. 2020)

DECREASED BY 849,500 COMPARED TO 2019

The 2020 is considered as a year of difficulties and challenges for the world economy in general, including Viet Nam. The world economy is forecasted to experience the most serious recession in history, the growth of major economies has declined deeply due to negative effects of the Covid-19 pandemic. However, Viet Nam's economy still maintained growth with GDP growth recorded to increase by 2.91%. With China and Myanmar, Viet Nam is one of only three countries in Asia which has positive growth rate in 2020.

## EMPLOYED POPULATION AGED 15 YEARS & OVERWORKING

**53.4M** (Est. 2020)

## UNEMPLOYMENT RATE OF LABOR FORCE

**2.26%** (Est. 2020)

URBAN 3.61% - RURAL 1.59%

## UNDEREMPLOYMENT RATE AT WORKING AGE

**2.51%** (Est. 2020)

URBAN 1.68% - RURAL 2.93%

## GLOBAL INNOVATION INDEX (GII)

**42 (↑3)** (2020)

UP 3 RANKS COMPARED TO 2019  
1<sup>ST</sup> RANK INNOVATION ECONOMIES IN LOWER MIDDLE-INCOME ECONOMICS GROUP ACCORDING TO WIPO 2019

The labor and employment situation in the fourth quarter of 2020 showed many signs of prosperity compared to the previous quarter, but due to the impact of the Covid-19 epidemic, the unemployment and underemployment rate for the whole year 2020 were higher than in 2019. In 2020, although the life of the people across the country faced many difficulties in effecting of natural disasters and epidemics Covid-19, with the attention of all levels, sectors from central to the local level and due to the strength of the population, people's lives were generally stable.

## HUMAN DEVELOPMENT INDEX

**0.704** (2020)

for the first time, Vietnam was included in the group of countries with highly human development and ranked 117 out of 189 countries and territories.

## NEWLY REGISTERED ENTERPRISES

**134,940** (2020)

DECREASE BY 2.3% COMPARED TO 2019

Average each month, 14.9 thousand newly established enterprises and re-operated enterprises.

With the determination and efforts of the Government and the business community in the face of the negative effects of the Covid-19 pandemic, the business registration situation in 2020 had remarkable results. In 2020, the whole country had 134.9 thousand newly established enterprises, a decrease of 2.3% compared to last year but the average registered capital of an enterprise reached 16.6 billion VND, an increase of 32.3%.

## CEASED ENTERPRISES

**101,700** (2020)

INCREASING BY 13.9% COMPARED TO 2019.

Average each month, there was nearly 8.5 thousand enterprises withdrawing from the market.

In 2020, there was 101.7 thousand enterprises ceased for a certain period of time, temporarily ceased and awaited dissolution procedures, completed dissolution procedures, increasing by 13.9% over the previous year, of which: The number of enterprises ceased for a certain period of time was 46.6 thousand enterprises, increasing by 62.2% compared to 2019; nearly 37.7 thousand enterprises temporarily ceased and awaited dissolution procedures, a decline of 13.8%; nearly 17.5 thousand enterprises completed dissolution procedures, an increase of 3.7%. Average each month, there were nearly 8.5 thousand enterprises withdrawing from the market.

## EXPORT TURNOVER OF GOODS

**\$281.5B** (2020)

INCREASED BY 6.5% OVER 2019

## IMPORT TURNOVER OF GOODS

**\$262.4B** (2020)

INCREASED BY 3.6% OVER 2019

The year 2020 recorded strong efforts of import and export activities in the context of domestic as well as the world economy negatively affected by the Covid-19 pandemic and the global trade disruption. Total import and export turnover of goods in 2020 was estimated at 543.9 billion USD, increased by 5.1% over the last year. Of which, export turnover of goods reached 281.5 billion USD, a rise of 6.5%, import turnover of goods gained 262.4 billion USD, rose by 3.6%. The trade balance of goods in 2020 saw an estimated trade surplus of 19.1 billion USD.

## FOREIGN DIRECT INVESTMENT

**\$28.5B** (2020)

As of November 2020, there were 109 countries and territories with investments in Vietnam. Singaporean firms have invested US\$8 billion in the country, the largest, beating South Korea from last year. South Korean firms came second (invested capital US\$3.7 billion), followed by China (investment capital US\$ 2.4 billion). In addition, multiple firms from Japan, Thailand, and Taiwan are also active in the country.

By 2025, Vietnam's digital economy could expand to US\$52 billion. Sub-sectors of the digital economy such as e-commerce, digital banking, and online gaming represent nascent and high-growth areas of consumer demand that investors could target. Therefore, while the Vietnamese consumer remains a driver of FDI, it is possible that the routes foreign firms need to take to reach the consumer could change.

## TOTAL IMPORT & EXPORT TURNOVER OF GOODS

**\$543.9B** (2020)

INCREASED BY 5.1% OVER 2019

## THE TRADE BALANCE OF GOODS 2020

**\$19.9B**

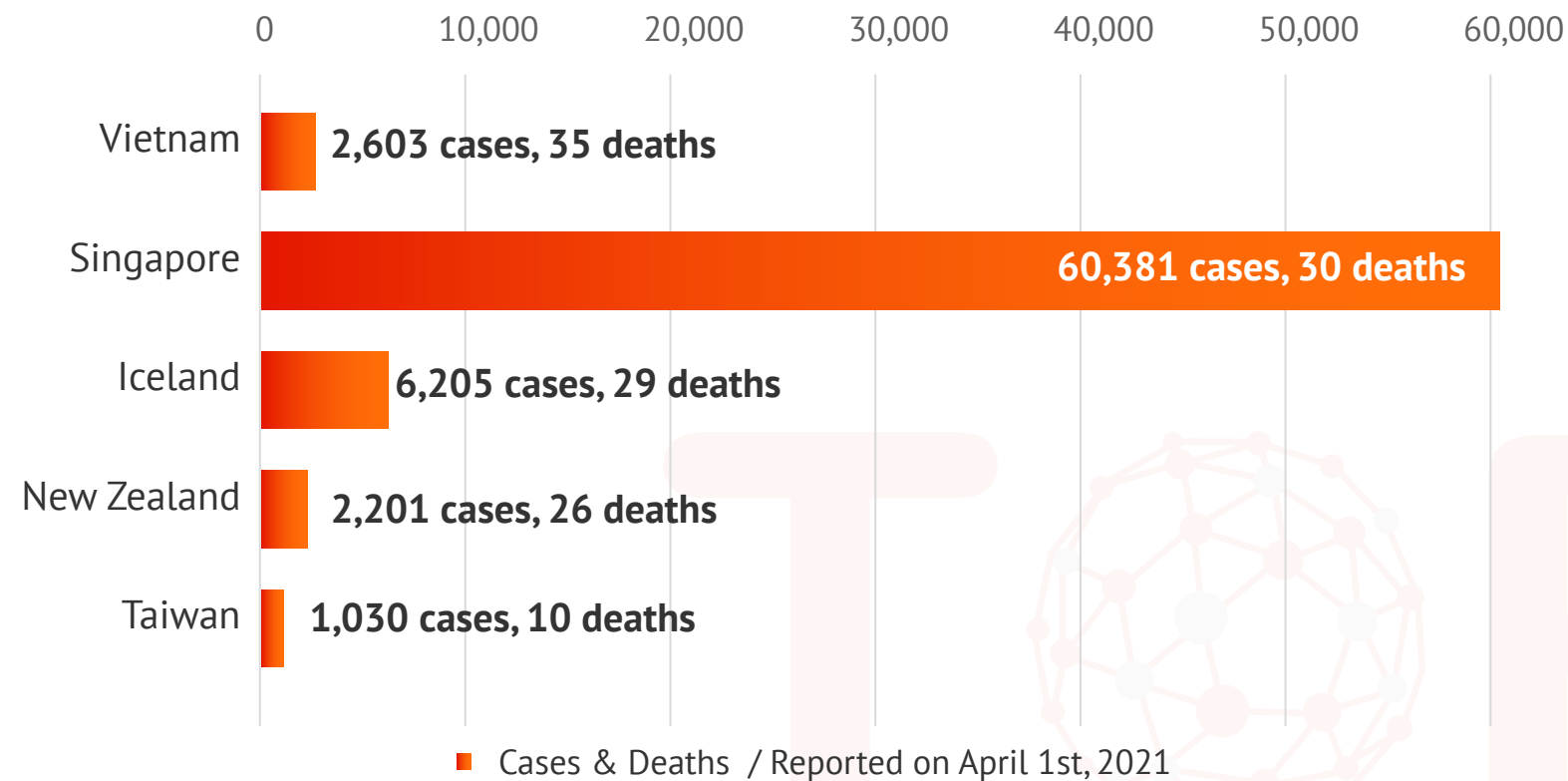
## RANKED

**8<sup>TH</sup>**

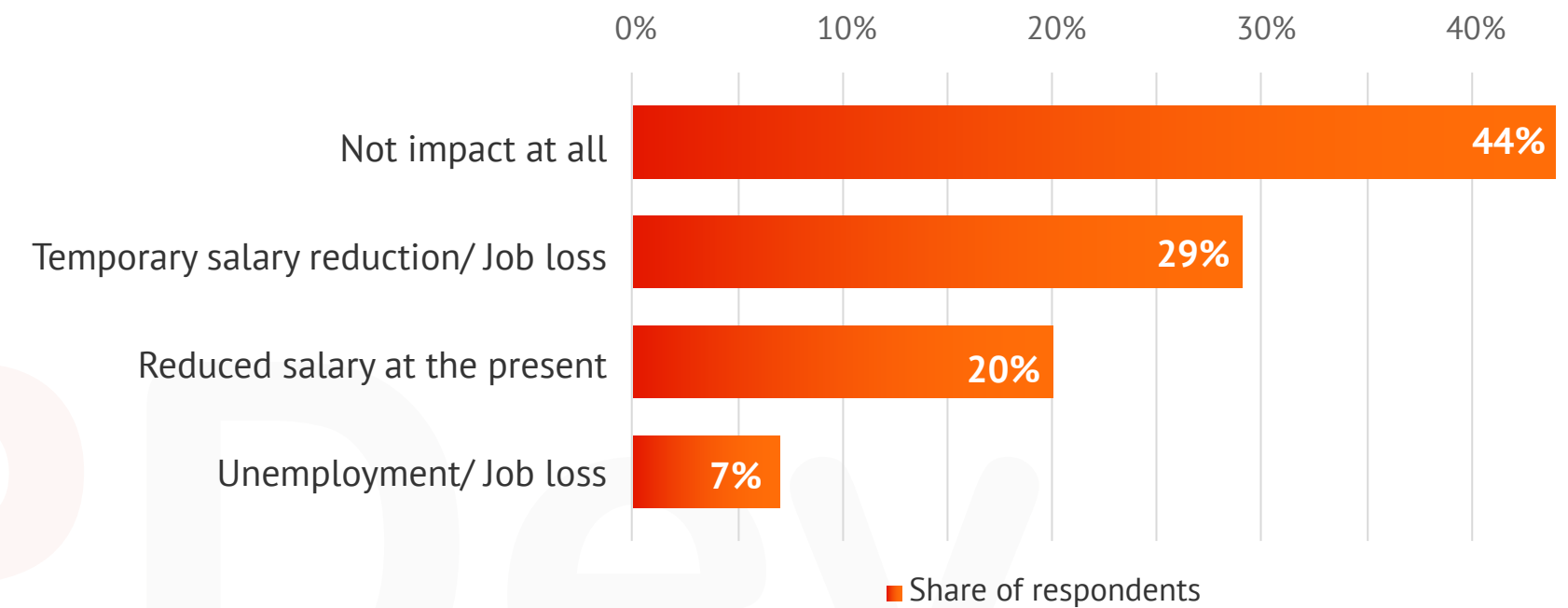
TOP 20 BEST COUNTRIES TO INVEST IN  
ACCORDING TO US NEWS & WORLD REPORT

# VIETNAM 1 YEAR AFTER COVID-19

## TOP 5 COUNTRIES HAVING BEST RESPONSES TO COVID-19 AS OF MARCH 2021

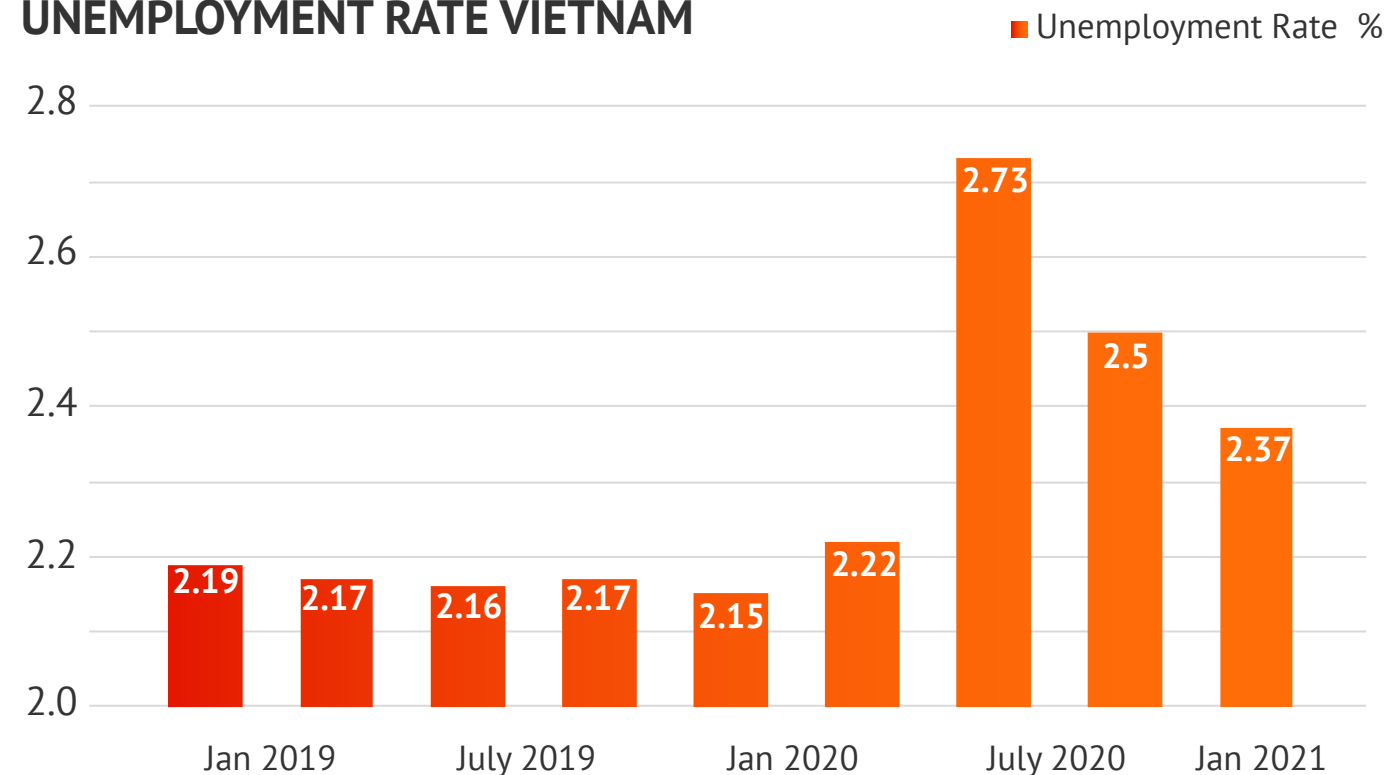


## IMPACT OF THE COVID-19 ON EMPLOYMENT STATUS AMONG PEOPLE IN VIETNAM AS OF JANUARY 2021



44% responded that the Covid-19 had no significant impact on their employment situation. On the other hand, the rest of the respondents reported experiencing salary reduction or losing their jobs temporarily, having reduced salary at the moment, or being unemployed.

## UNEMPLOYMENT RATE VIETNAM



## LABOR FORCE SIDE

Labour force continues to rise in line with the recovery stage in Quarter III-IV/2020 following big changes in first quarter of 2021, however, the number has yet to resume its original point before the pandemic. (2.37% in Jan 2021 compared to 2.19% in Jan 2019)

## ENTERPRISES SIDE

In total, 87.2% of enterprises participated in the survey said that they are negatively affected, 11% are not and only 2% recorded positive growth rates. Businesses that have been operating for less than 3 years, small and micro-enterprise are struggling the most.

In addition, to withstand the pandemic, 35% of private enterprises and 22% of FDI enterprises have had to lay off their employees. In which, 36% of small and micro private enterprises, 26% of medium-sized enterprises and 32% of large-scale enterprises implemented this measure.

Results of the business tendency survey of manufacturing enterprises in the first quarter of 2021 showed that: 29.6% of enterprises assessed that the business production situation in the first quarter of this year was better than fourth quarter of 2020; 31.4% of enterprises faced difficulties and 39% of enterprises said that the business production situation was stable. For expected outcome of the second quarter of 2021, 51% of enterprises presented that the tendency would get better; 14.9% of enterprises predicted that it would be more difficult and 34.1% of enterprises said that the business production situation would be stable. In which, the foreign direct investment sector was the most optimistic, 86.2% of enterprises forecasted a better the business production situation in the first quarter of 2021 and expected to remain stable.

## GROWTH RATE OF GDP QUARTER I/2021

**4.48%** (Q1/2021)

Gross domestic product (GDP) in the first quarter of 2021 is estimated to increase by 4.48% over the same period last year, higher than the growth rate of 3.68% in the first quarter of 2020, despite being affected by the Covid -19 in some localities.

Global ranking increases in various subfields of the industry have been the proof of this contribution. The post rose from the 57th position to 49th, ICT from 108th to 77th, e-government from 89th to 86th, and cybersecurity from 100th to an impressive position of 50th. The number of businesses in the field has witnessed a development of 28 percent. Other significant achievements of the industry include a successful 5G technology pilot, an entrance into the list of top-10 countries with the latest generation of Internet protocol.

More importantly, Vietnam now stands at the second position in the world as to mobile phone and parts manufacturing, and the tenth position regarding electronic parts production. These two have helped the ICT become the industry with the largest export surplus in the Vietnamese economy.

The draft of National Strategy on Vietnam's digital technology companies by 2030 clearly state to concentrate on developing 4 types of digital technology companies in Vietnam, including:

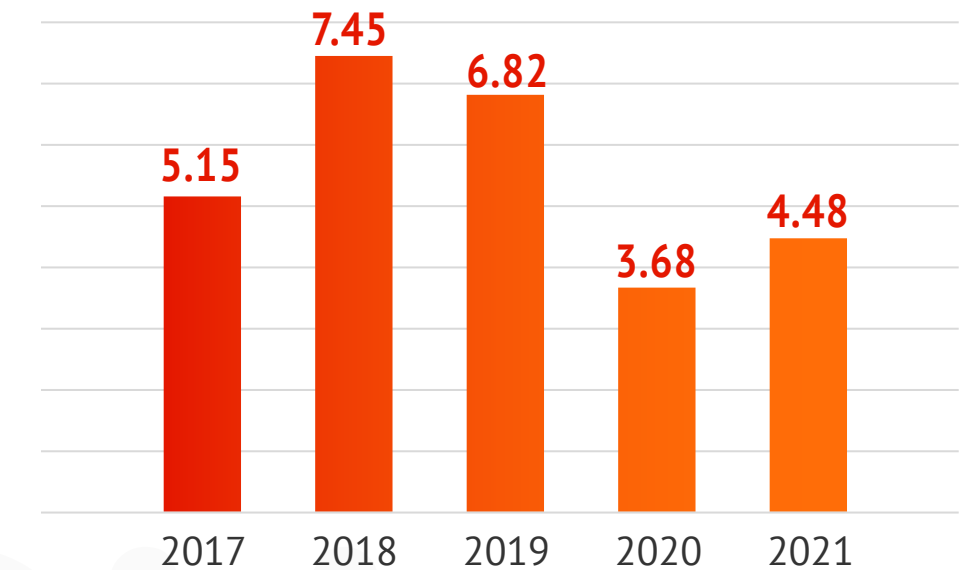
**GROUP 1**  
Companies developing core technologies

**GROUP 2**  
Companies developing digital technology products and services

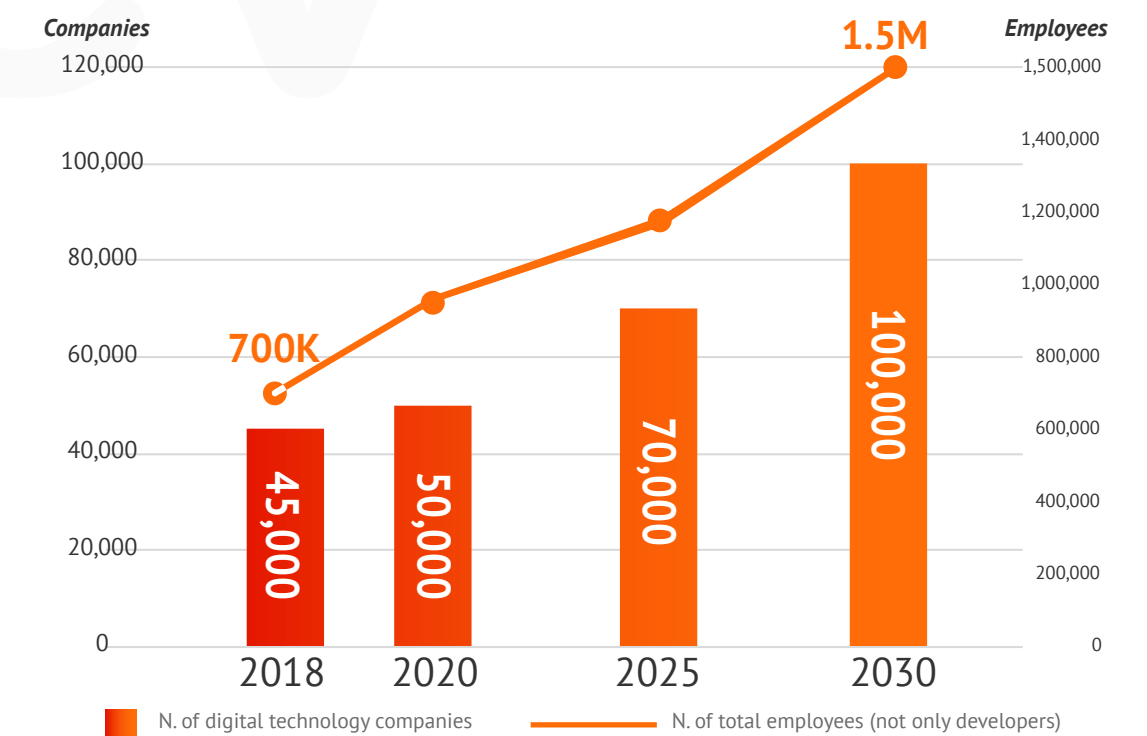
**GROUP 3**  
Companies developing digital technology solutions

**GROUP 4**  
Digital technology start-ups.

## GROWTH RATE OF GDP QUARTER I IN PERIOD 2017 - 2021 (%)



## VIETNAM TARGETS TO REACH 100,000 DIGITAL TECHNOLOGY COMPANIES BY 2030



According to the Draft, by 2025, Vietnam is expected to have 70,000 digital technology companies with 1.2 million people working in this sector. By 2030, Vietnam sets the target to have 100,000 digital technology companies; 1.5 million digital workers.

## ICT TOTAL REVENUE

**\$120B** ↑ 7.1% (2020)

Increased by 7.1% over 2019

## IN WHICH:

### HARDWARE

**\$107B** (2020)

### SOFTWARE

**\$5B** (2020)

## ICT EXPORT

**\$84.45B**

↑ 7.1% (2020 VS 2019)

ICT exports account for about 30% of the total national export value and 3% of global ICT exports

## INTERNET ECONOMY GROWTH RATE

**17%** (2020)

The highest in Southeast Asia





# DEVELOPER

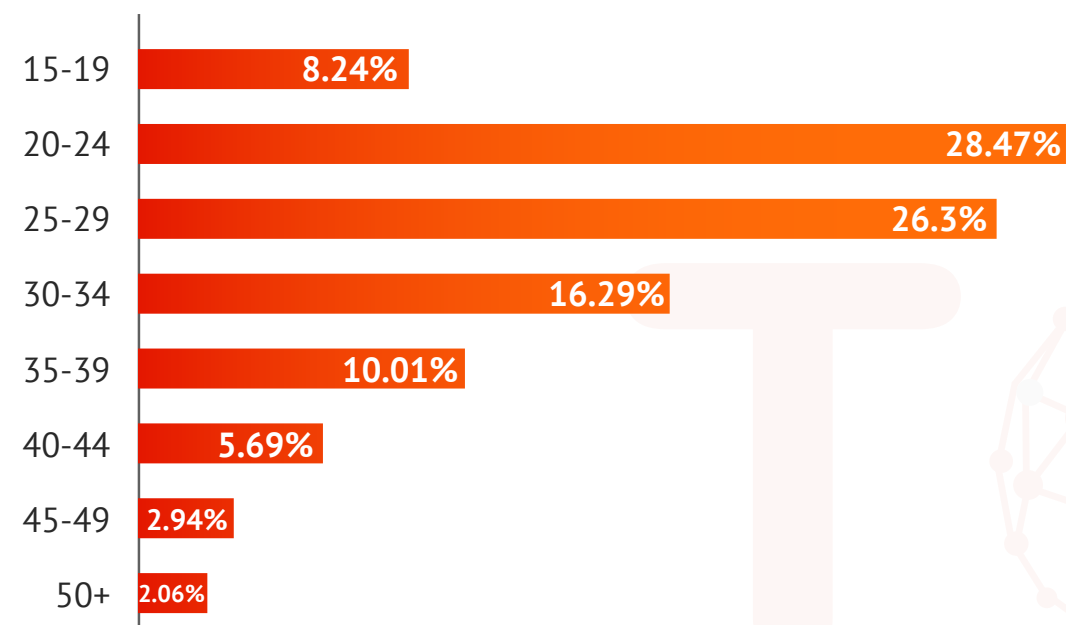
## PROFILE

### HOW THINGS HAVE CHANGED IN 2021?

# DEMOGRAPHIC /PERSONAS

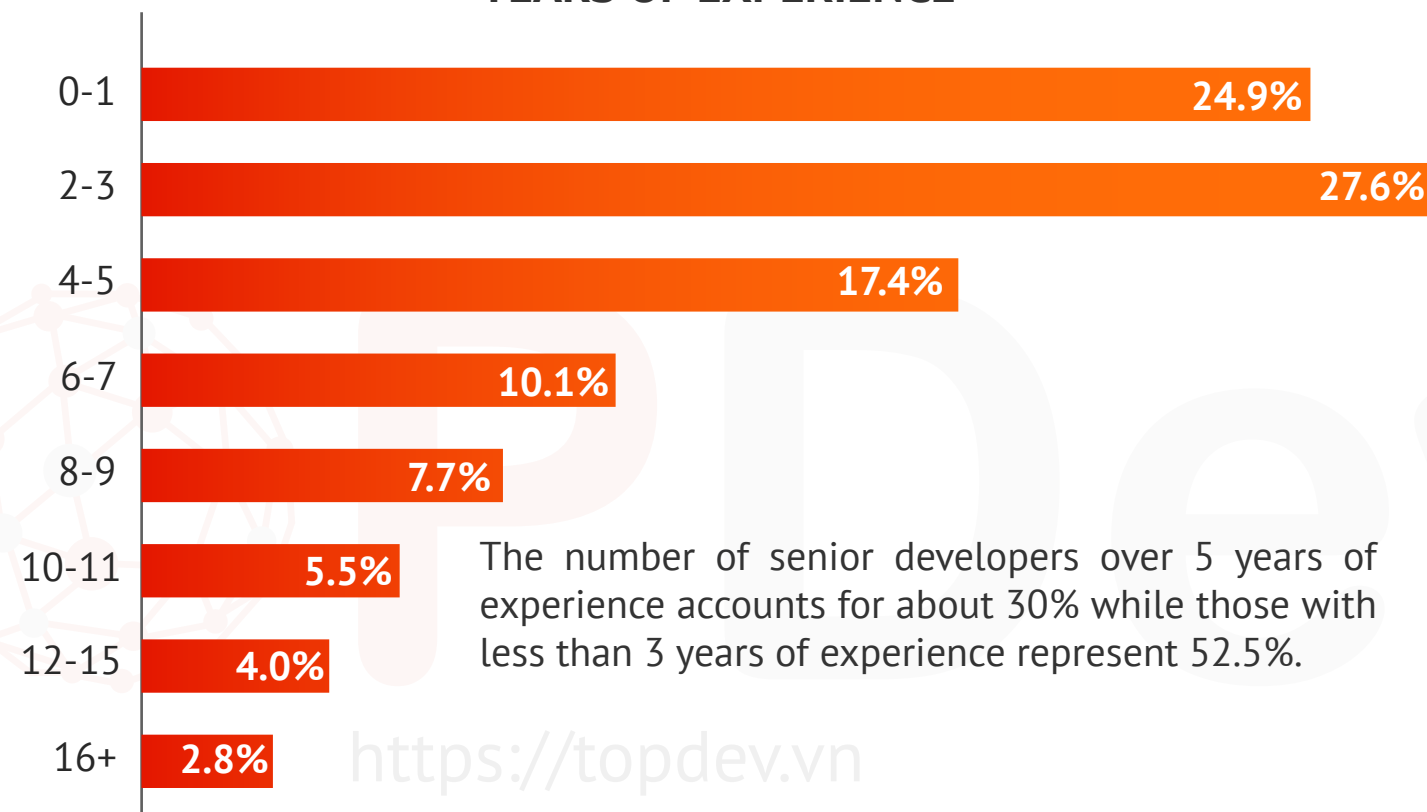
Nowadays, most of the developers belong to the Millennials generation - employers need to pay attention to age, interests and insights to adjust their recruitment plan to suit the current multi-generational recruitment trends nowadays. This is a generation that desires a better balance, a healthy lifestyle, more information about the company, its products and wants to be highly involved in the product development process. They also expect the product to have the ability to serve them and their community. Millennials with a fast-paced way of living require an active and flexible lifestyle. The recruiters also need to prepare for the Centennials (GenZ), following Millennials. GenZ's mindset and how to interact with them are becoming much more different. They are projected as a new wave which would change service and entertainment industry context, recruitment and ICT are not exemptions, certainly.

## AGE

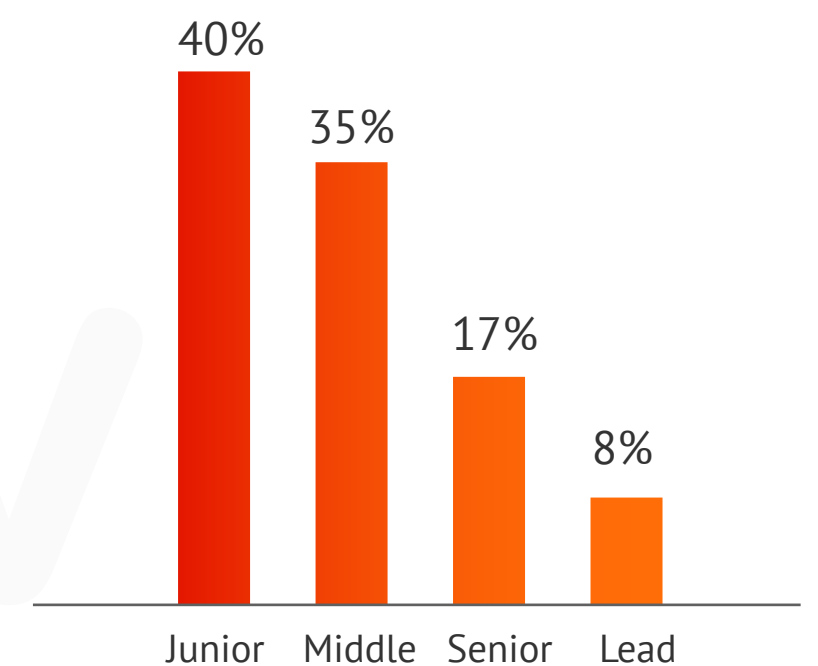


The age dominating this survey is from 20 to 34 years old. Numerous developers started coding early and about 8.24% of them started coding before 20. At present, the number of developers in Vietnam at a young age accounts for the majority with 54.76% aged 20 - 29 years old.

## YEARS OF EXPERIENCE



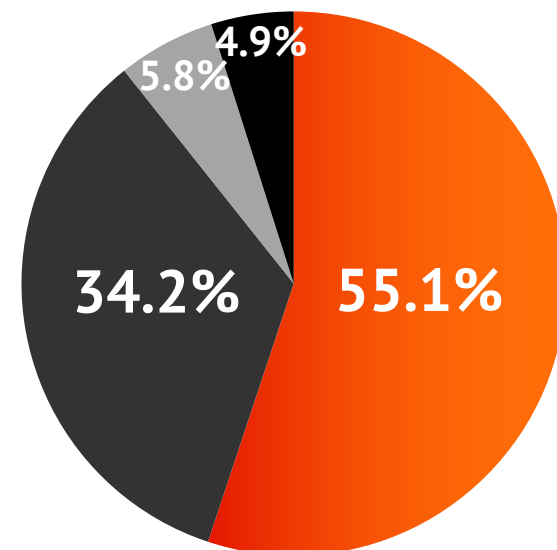
## LEVEL OF QUALIFICATION



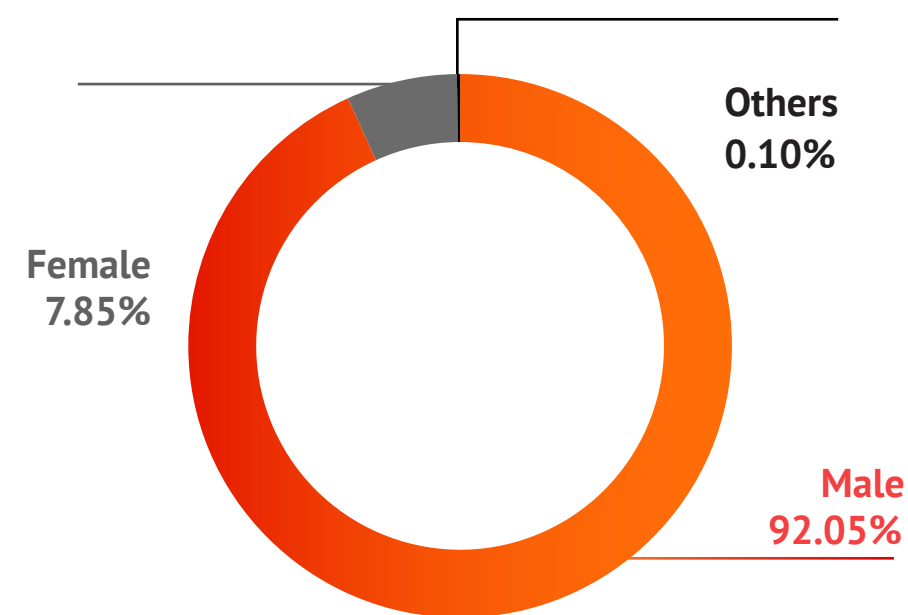
There is a large number of developers with only a few years of experience but having Senior / Lead expertise. In contrast, some having many years of experience but only being reviewed as Junior or Middle-higher positions.

## LOCATION

- Ho Chi Minh City
- Ha Noi
- Da Nang
- Others



## GENDER




Male still dominates the gender of developers or people working in the technology sector with more than 92.05%. Females constitute a minor number of 7.85%, however, the proportion of women has also increased significantly, especially those having 2 years of experience or more. Also, compared to last year, the number of females working in the IT sector saw considerable growth.

# DEMOGRAPHIC / POPULAR TECHNOLOGIES


React, MySQL, Spring, Laravel, Sass, Django and Django are the most popular technologies in their respective tech stacks.

**JS** Javascript


1. React	34.11%
2. Node.js	30.19%
3. Vue	19.08%
4. Angular	18.26%
5. Express	10.82%

 Java


1. Spring	55.96%
2. Struts	18.47%
3. Hibernate	18.03%
4. JSF	12.37%
5. Vaadin	5.77%

 .NET/ C#


1. .NET Framework	56.93%
2. .NET Core	39.60%
2. ASP.NET Core	25.15%
4. ASP.NET MVC	22.04%
5. Xamarin	8.35%

 PHP


1. Laravel	61.21%
2. Symfony	34.17%
3. CodeIgniter	28.38%
4. Yii	12.89%
5. CakePHP	5.89%

 SQL


1. MySQL	53.11%
2. SQL Server	20.66%
3. PostgreSQL	18.77%
4. MongoDB	13.87%
5. Redis	10.47%

 CSS

1. Sass	75.33%
2. Less	64.37%
3. Stylus	50.20%
4. PostCSS	39.85%
5. SCSS	18.62%

 Python

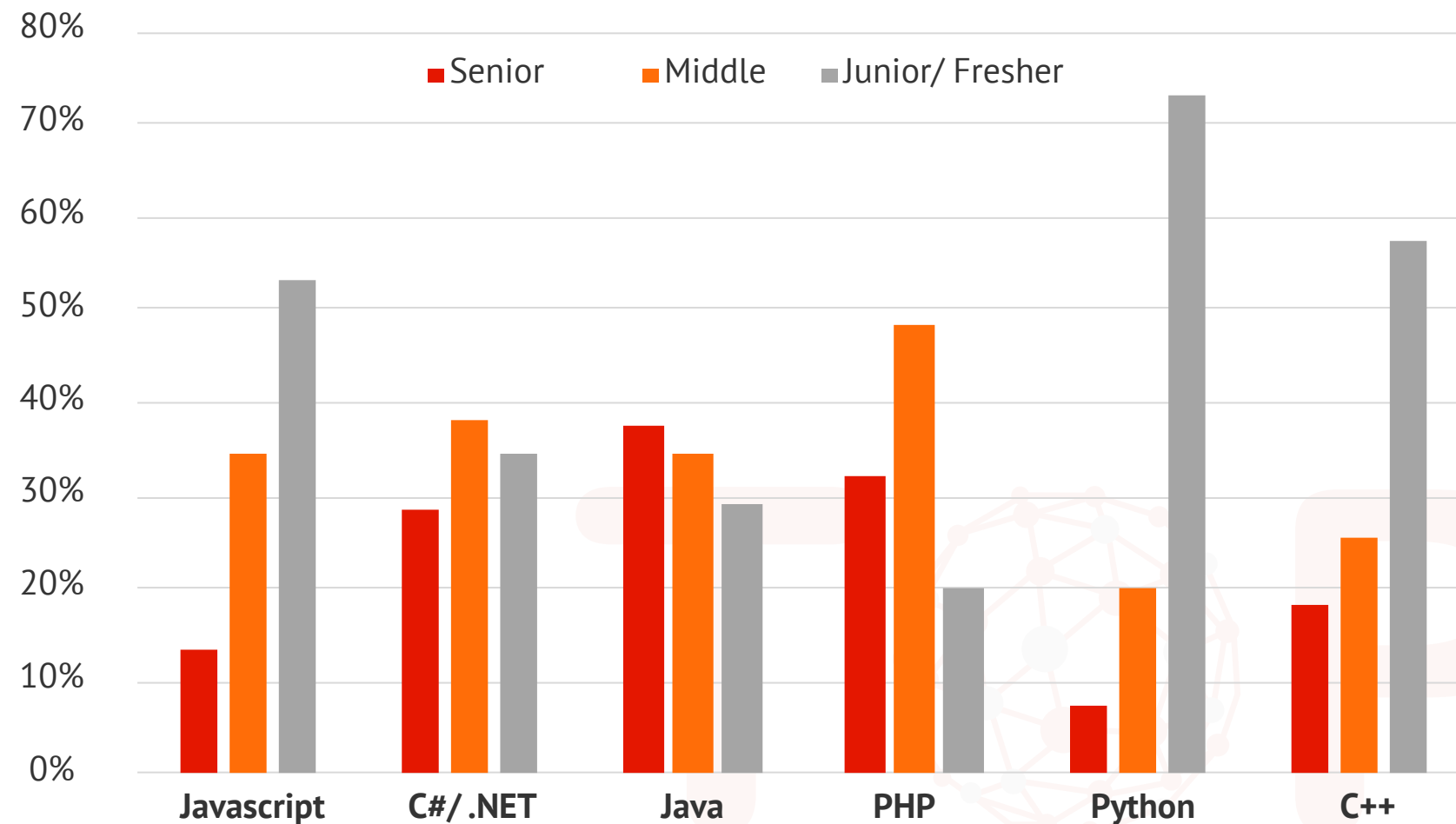
1. Django	35.22%
2. Falcon	20.96%
3. Pyramid	6.50%
4. Flask	4.40%
5. Bottle	2.10%

 Mobile Development

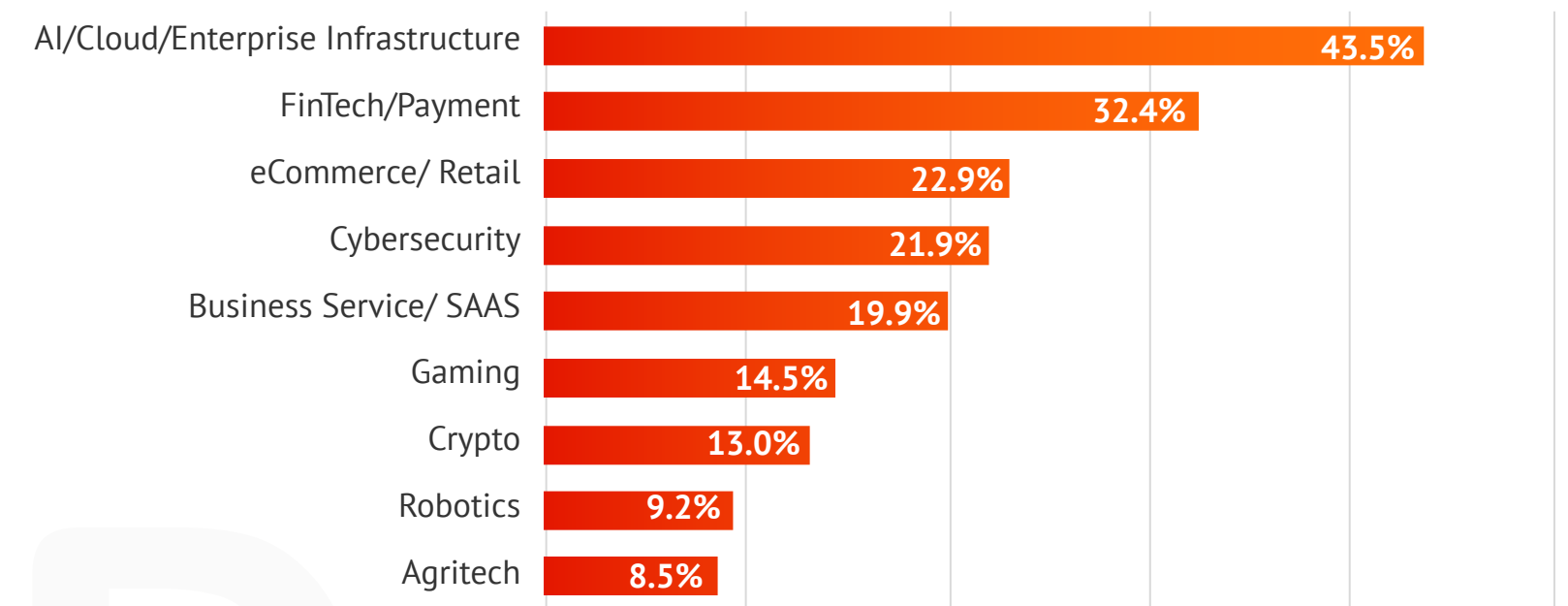
1. Java	45.06%
2. Swift	35.19%
3. Objective-C	34.21%
4. React Native	31.12%
5. Flutter	12.56%

JavaScript is the most popular language together with other IT skills. In which, React, Nodejs & Vue are the top 3 choice of Javascript frameworks, while React & Node.js quite share the same popularity among developers. Top choice to work with Java is Spring (more than 55%) then Struts & Hibernate respectively. There hasn't been much change in .NET/C# list in which .NET Framework, .NET Core & ASP.NET Core top the list. Laravel remains the most popular framework in the PHP tech stack with more than 61%, followed by Symfony (34.17%) & CodeIgniter (28.38%). MySQL keeps leading the SQL tech stack with more than 53%. However, the level popularity among SQL systems doesn't vary that much while Top 5 (MySQL, SQL Server, PostgreSQL, MongoDB & Redis) contribute respectively the same importance of database functions in every development. Top 5 CSS preprocessors places belong to Sass, Less, Stylus, PostCSS & SCSS. Python - one of the hottest 'player' recently in technologies world - show significant gap in popularity among choices, in which Django framework choice accounts for 35.22% while the 5th rank (Bottle) just share 2.1%. Among Mobile Developers, Java, Swift & Objective-C take the places on top 3 list of programming languages choice. Meanwhile, new "players" - React Native and Flutter have experienced dramatic increase in popularity in recent years.

TOP POPULAR TECHNOLOGIES BY SENIORITY

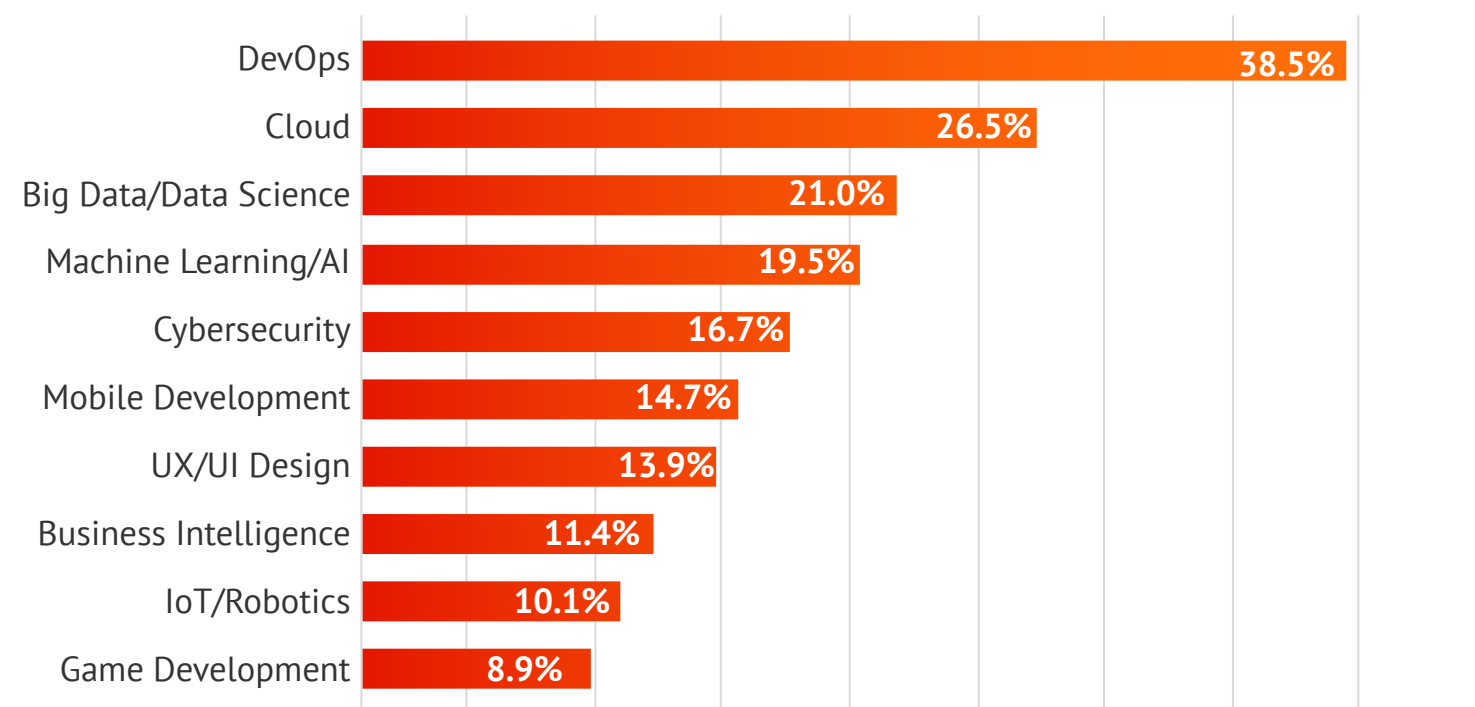


MOST DESIRED INDUSTRIES CHOSEN BY DEVELOPERS



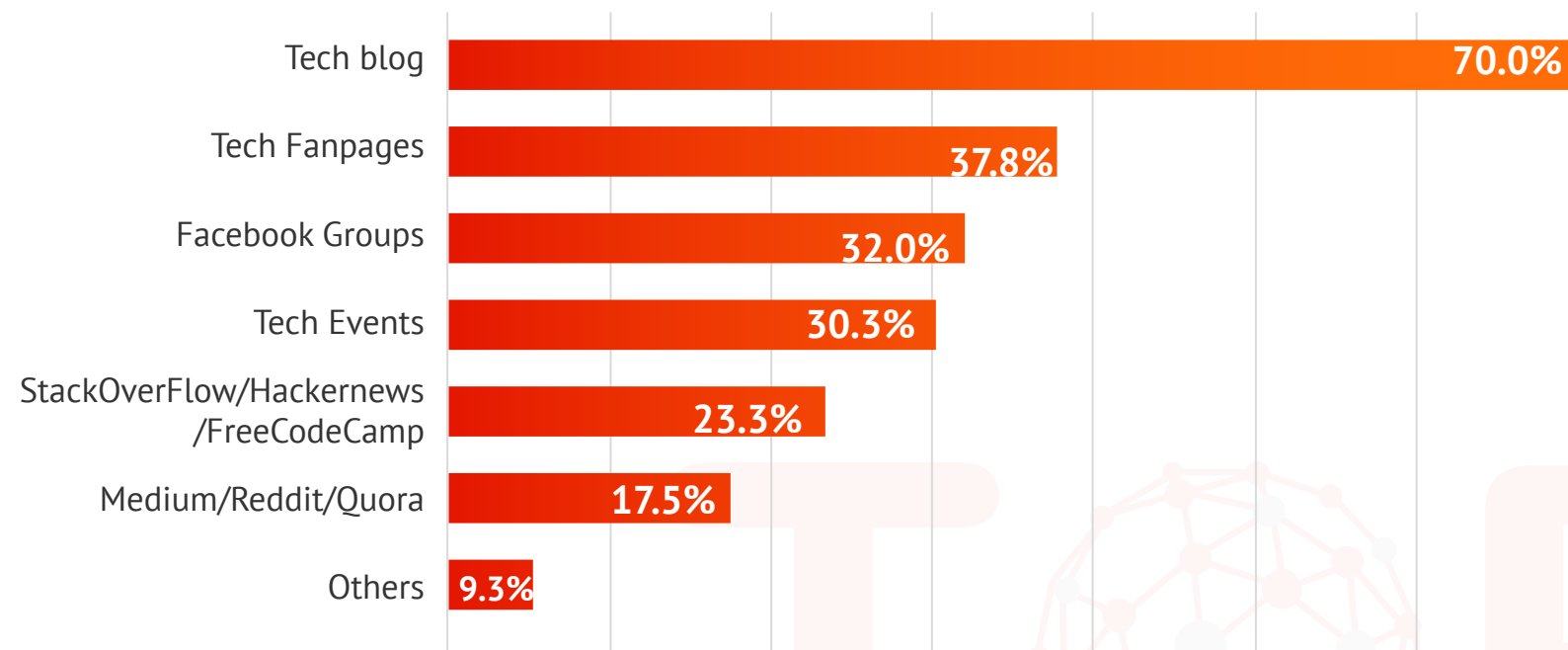
Answer to the question: What industries do you think will grow in 2021? The response of the developers participating in the survey shows that AI & Cloud engineering industry will take the lead, followed by Fintech/ Payment and ranked 3rd by eCommerce/ Retail. It is not surprising that Cloud Engineering, Fintech, e-Commerce, Cybersecurity and Business Service are at the forefront. That is because in 2020, the trend of digital transformation takes place in all aspects of daily life as well as at the workplace. The growth of online shopping, online management and the importance of cybersecurity have made these industries more attractive than ever.

TOP TECHNOLOGIES DEVELOPERS WANT TO WORK WITH/ LEARN IN 2021



Answer to the question “What new technologies do you want to work with or learn in 2021?”. Compared to 2 years ago, top interest in technologies has had some significant shifts. Most notable one is increasing interest in DevOps and Cloud technologies, which are fueled by digital transformation and new problems arised by pandemic era. Following the list are the names that are always popular in the technology race, including Big Data/ Data Science, Machine Learning/ Artificial Intelligence. As advanced data technology gradually provides optimal solutions for current life as well as better and more accurate predictions of future forecasts and trends (both risks and threats), IT talents have more desire to apply these technologies to their products and programming works. The next indispensable tech is Cybersecurity, the pandemic has formed a lot of new behaviors, needs and shifts, from offline to online, from onsite to remote, has posed many problems in management, security, stability and level of data/ system privacy. Since then, many motivations and needs have been formed for developers who want to learn and have more opportunities to practice related to Cybersecurity. The remaining list such as Mobile Development, UX/ UI Design, Business Intelligence, IoT/ Robotics and Game Development are still attractive topics that developers want to try in 2021.

## HOW DEVELOPERS UPDATE TECH NEWS?



70% of developers claimed that they mainly update their knowledge through blogs rather than other media channels. Unlike international developers - updating knowledge through Twitter, Vietnamese developers shall choose programming fanpages as well as Facebook communities (Fanpages & Groups) of those expertising in specific programming languages.



## PASSION FOR CODING

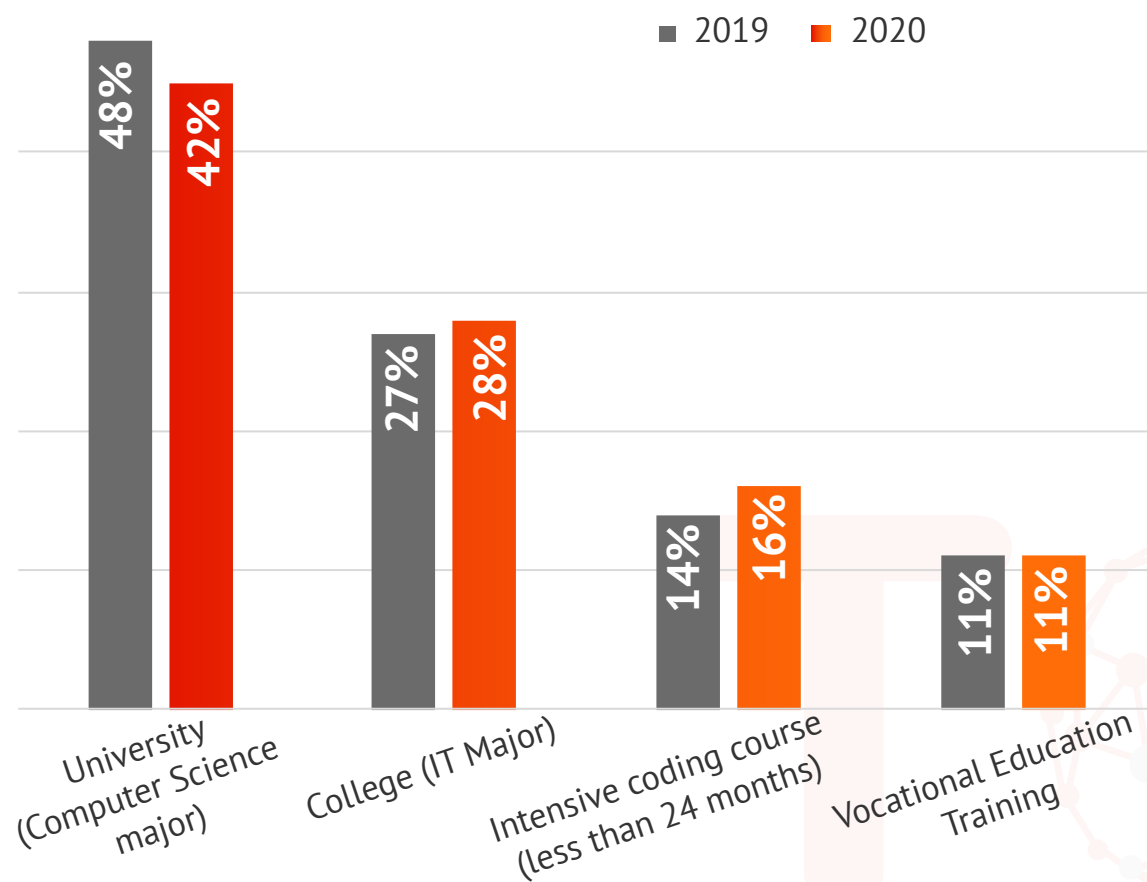
Developers genuinely love & appreciate what they do—and this passion continues to extend. 52.5% of respondents said their primary motivation for learning a new technology is simply because they enjoy it. When asked about what attracted them to start career as developer, 75% said “**passion for technology, programming & computer**”, followed by 63% of “**Attractive salary & prospective career development**” and 55% of having “**Good logical & computer background**”.

Developers also like to contribute to open source projects. 39.3% have contributed to open source software a few times, while 5.3% do so frequently. Open source projects are an activity that software developers enjoy doing in their personal time.

28.4% of developers contribute to open source simply because it’s fun. Lack of economic opportunity, unemployment and social issues are the top 3 problems developers want to solve through coding. Especially this pandemic situation, there have been many social projects contributed by developers to keep track on positive Covid-19 cases, travel schedule or real-time alert/ monitor cases surrounding, which attracted so many IT talents & organizations to support.

For the majority of developers, coding isn’t just something they do at workplace or in working hours. 76.2% of respondents said they code outside of work. About 51.4% of developers spend 1 hour for personal projects. Nearly 43.2% of developers spend 2-5 hours for personal projects.

Following the movement of the market, most developers still use Windows, 29.7% using MacOS, the rest is for Linux-based & others.



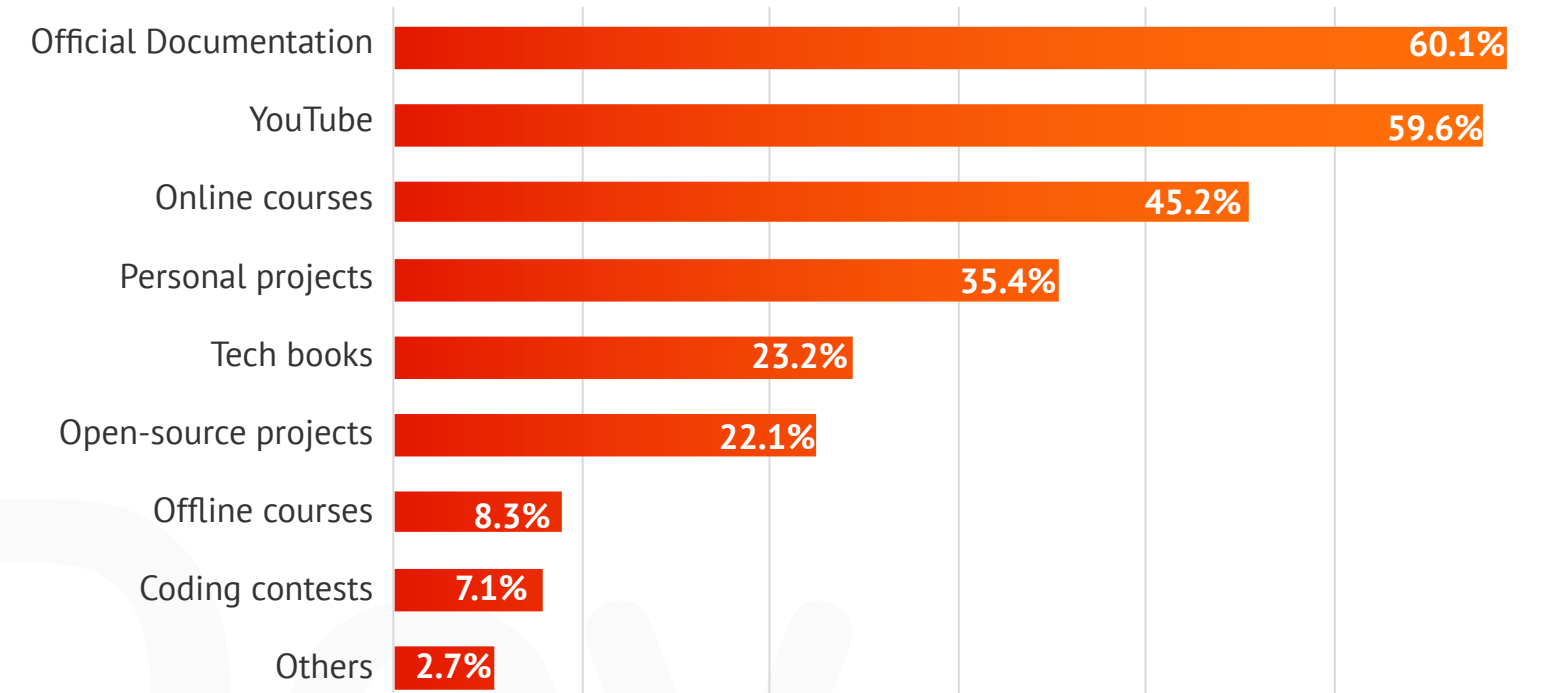
## HOW DID DEVELOPERS START TO LEARN PROGRAMMING?

We do a survey of developers about where they start with learning to code.

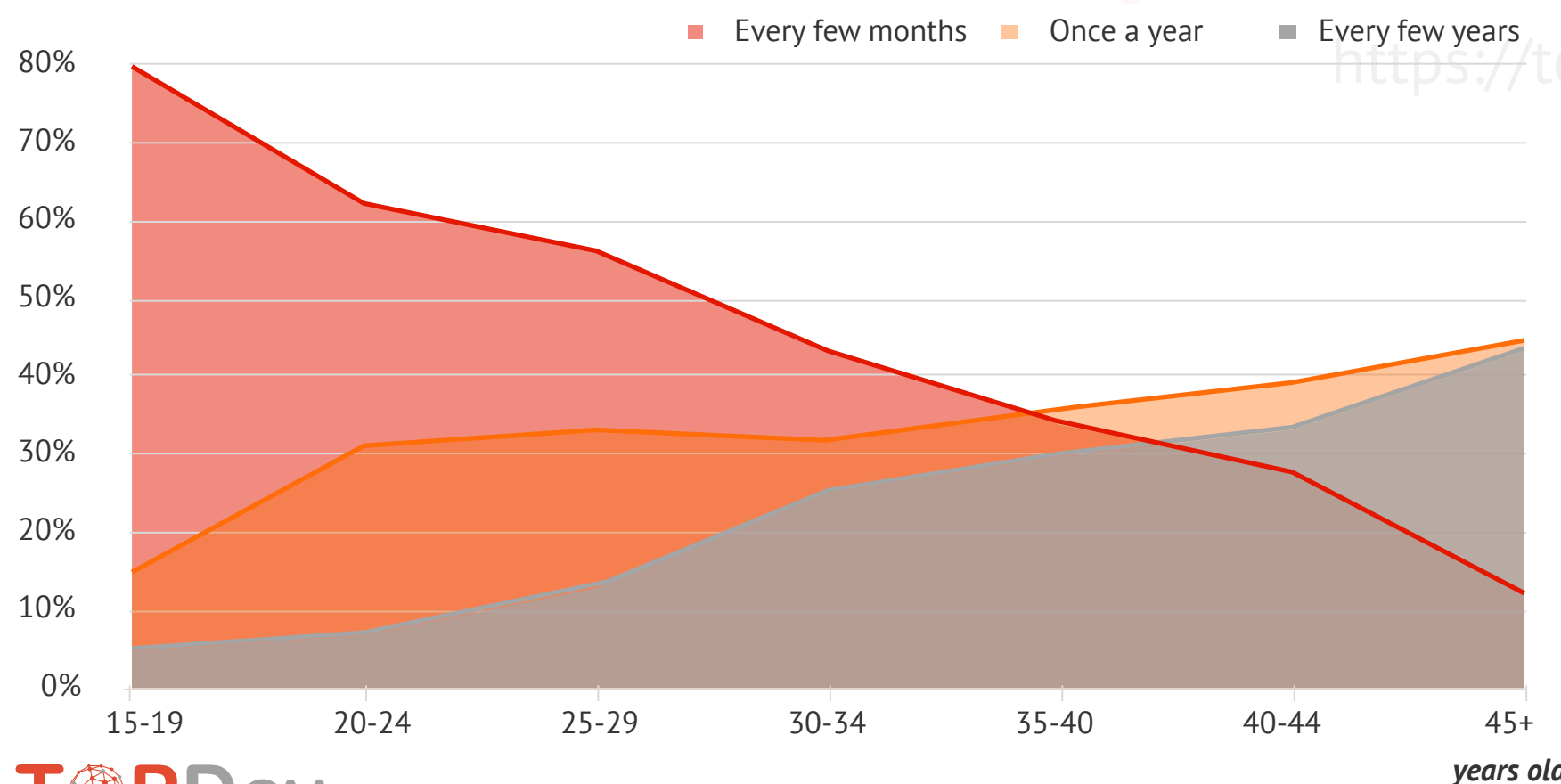
The top 2 in the list are the formal training systems in Information Technology at Universities (42%) and Colleges (27%).

Followed by intensive coding courses (shorter than 24 months). And last on the list is the Vocational Education and Training program.

## HOW HAVE DEVELOPERS LEARNT NEW PROGRAMMING LANGUAGE?



Up to 60% of the responses mentioned official documentation as well as Youtube sources. 45.2% of developers learn through online courses. Followed by personal projects (35.4%). Personal projects are also a good way for developers to have environments of experiment, diversify approaches, update new technologies, create their own products and make the highlight on their working experience profile. Some other popular resources for learning programming include: technology books, open-source projects, offline courses and coding contests.



## MOTIVATION FOR LEARNING NEW THINGS FROM DEVELOPERS BY AGE

With the question: How often do you actively learn new knowledge?, we received answers with many age differences. More than 50% of developers under 30 years old usually try to learn something new within a few months. This figure for beginners/freshers (15 - 24 years old) is up to 80%. For developers over 35 to 45 years old, the frequency of spending time learning new knowledge is once a year. And this motivation for developers over 45 years old decreases even more, often they will learn new technology within a few years. It is undeniable that the information technology industry is a dynamic and rapidly changing industry. This requires developers to stay up to date with new technologies to stay competitive and keep evolving in the industry. Fresher/Junior with the advantage of learning ability as well as a relatively comfortable time, they can update new technology trends every few months. As for developers over 35 years old, most of them have identified their expertise and focus to become an expert in that stack, so their priority will no longer be to expand their knowledge horizontally but in depth instead.

# VIETNAM DEVELOPERS RANKING

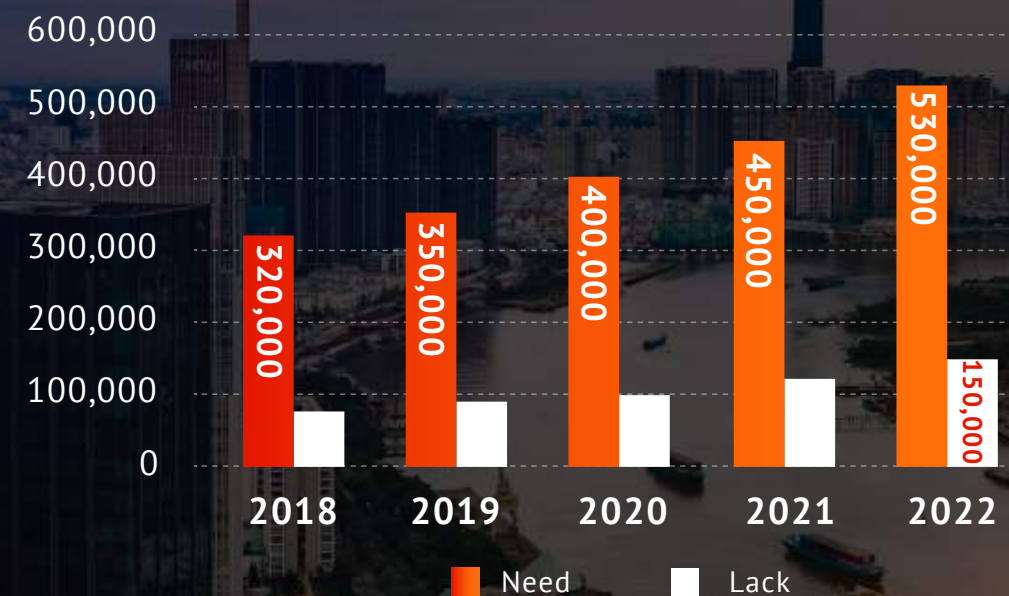
IT ENGINEERS  
IN  
SOFTWARE INDUSTRY

430,000<sup>(\*)</sup>

(\*) Based on 2019 report from MOET with estimated growth rate in annual general universities/ colleges enrollment quotas.

IT STUDENTS  
GRADUATE ANNUALLY  
(SOFTWARE MAJOR)

55,000<sup>(\*)</sup>



## IT PERSONNEL DEMAND IN VIETNAM 2018 - 2022 (SOFTWARE INDUSTRY ONLY)

In the past 5 years, the demand for IT personnel in Vietnam has continuously increased. Based on TopDev's 2020 IT market report and the growth rate of the number of developers in Vietnam, in 2021 Vietnam needs 450,000 IT workers. However, the total number of developers currently in Vietnam (as of Q1/2021) is 430,000, which means 20,000 developer positions will not be filled in the near future. This shortfall comes from the disparity between developers' qualifications and business requirements. Notably now only about 16,500 students out of a total of 55,000 students majoring in Information Technology meet business requirements. Also from here, the Ministry of Information and Communications has focused on training the Information Technology industry through the Draft on Development Orientation of the Information and Communication Industry in 2021.

## VIETNAMESE DEVELOPERS' COMPETENCE IN GLOBAL TECH ASSESSMENT PLATFORMS

### SKILLVALUE

29<sup>TH</sup>

Worldwide in Developer Skills Charts of Skillvalue's Report 2019 (The only one of SEA region in Top 30)

### HACKERRANK

23<sup>RD</sup>

Worldwide in Developer Skills Charts of HackerRank's Report 2016

### TOPCODER

TOP 6

Worldwide in Developer Skills Charts of TopCoder's Report 2016



Find Top IT Jobs </> Hire Top Developers

## VIETNAM IN THE GLOBAL INDEXES OF SOFTWARE DEVELOPMENT OUTSOURCING

### GLOBAL SERVICES LOCATION INDEX

5<sup>TH</sup>

In 2019 Kearney Global Services Location Index, only after India, China, Malaysia & Indonesia (Global Outsourcing Ranking - 4 main factors: Financial attractiveness, People skills & availability, Business Environment, Digital resonance)

### TOP 50 DIGITAL NATIONS - THOLON

13<sup>TH</sup>

In TSGI Top 50 Digital Nations all over the world, according to Tholons Services Globalization Index 2019 (7 main factors: Talent, Skill & Quality, Business Catalyst, Cost & Infrastructure, Risk & Quality of Life, Innovation, Digital, Super Cities, Population)

### TOP 100 OUTSOURCING DESTINATION - THOLON

18<sup>TH</sup>

In the Tholons Top 100 Outsourcing Destination 2016 with Ho Chi Minh City (18th) & Hanoi (19th)

## THE WAVE OF STRONG TECHNOLOGY AND ICT INVESTMENT

Currently, Vietnam has about 45,500 enterprises in the ICT industry, including foreign-invested enterprises with an estimated total revenue of about 126 billion USD (according to the Ministry of Information and Communications). Thanks to policies to attract foreign investment and a clear national digital transformation strategy from the Vietnamese Government, thanks to competitive costs, good infrastructure with many information technology parks, high-tech parks Vietnam has become an attractive destination for technology and ICT investors.

At the Conference on Investment in Vietnam's ICT industry at the end of 2020, Mr. Thieu Phuong Nam, General Director of Qualcomm Vietnam - Laos and Cambodia, committed that in the coming time, Qualcomm Vietnam will continue to expand investment in Vietnam related to research and development (R&D), strengthen cooperation, support and share original technology, technology copyright and technology platform to help Vietnamese businesses, especially start-ups, strengthen capacity and bring "Made in Vietnam" products to the world market.

Hindustan Computer Limited (HCL), one of the 3 largest IT companies in India (Top 5 outsourcing companies in the world) has opened an office in Hanoi in January 2021 and started its development journey in Vietnam. Vietnam market. In the investment plan from here to 2025, Deputy Director Sanjay Gupta presented the construction of an organizational structure with 8,000 employees; at the same time, emphasize the cooperation program on training high-quality ICT human resources with universities and colleges.



# IT JOBS

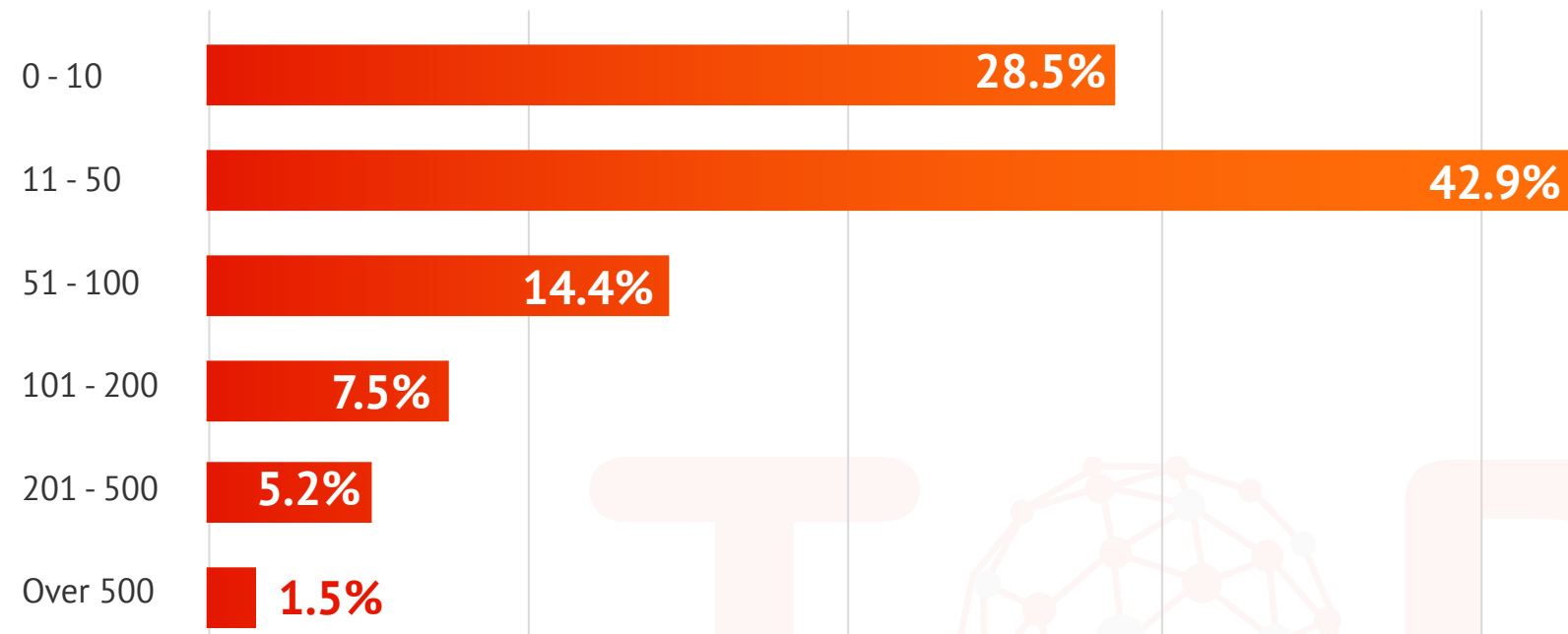
## MARKET

### SALARIES, DEMANDS & TRENDS



## IT RECRUITMENT TARGET IN 2021

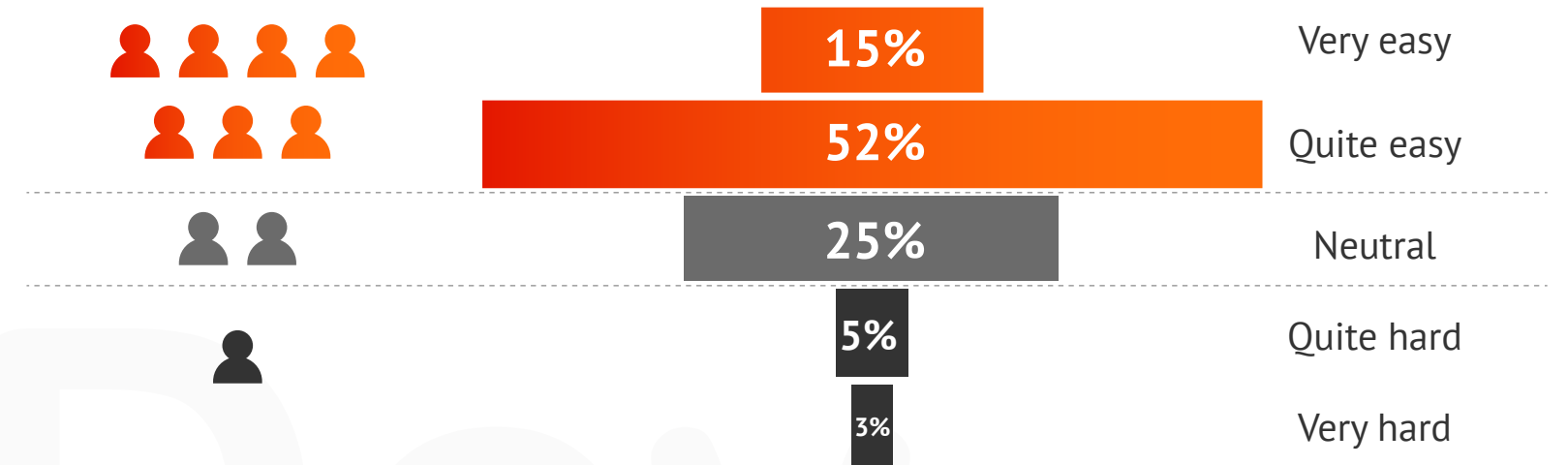
Question: How many developers planned to hire in 2021? ((HR-side only)



With this number, it is estimated that the IT labor market in 2021 will have 117,180 IT jobs, up 36.5% compared to 2020. This growth rate shows a positive signal with an increase of 1.2% (compared to the same period in 2020 as in 2019 due to the impact of Covid-19)

## HOW CONFIDENCE OF DEVELOPE WHEN FINDING A JOB?

Question: On a scale of 0 - very hard to 5 - very easy, how do you think you can change jobs as a developer? (Developer-side only)

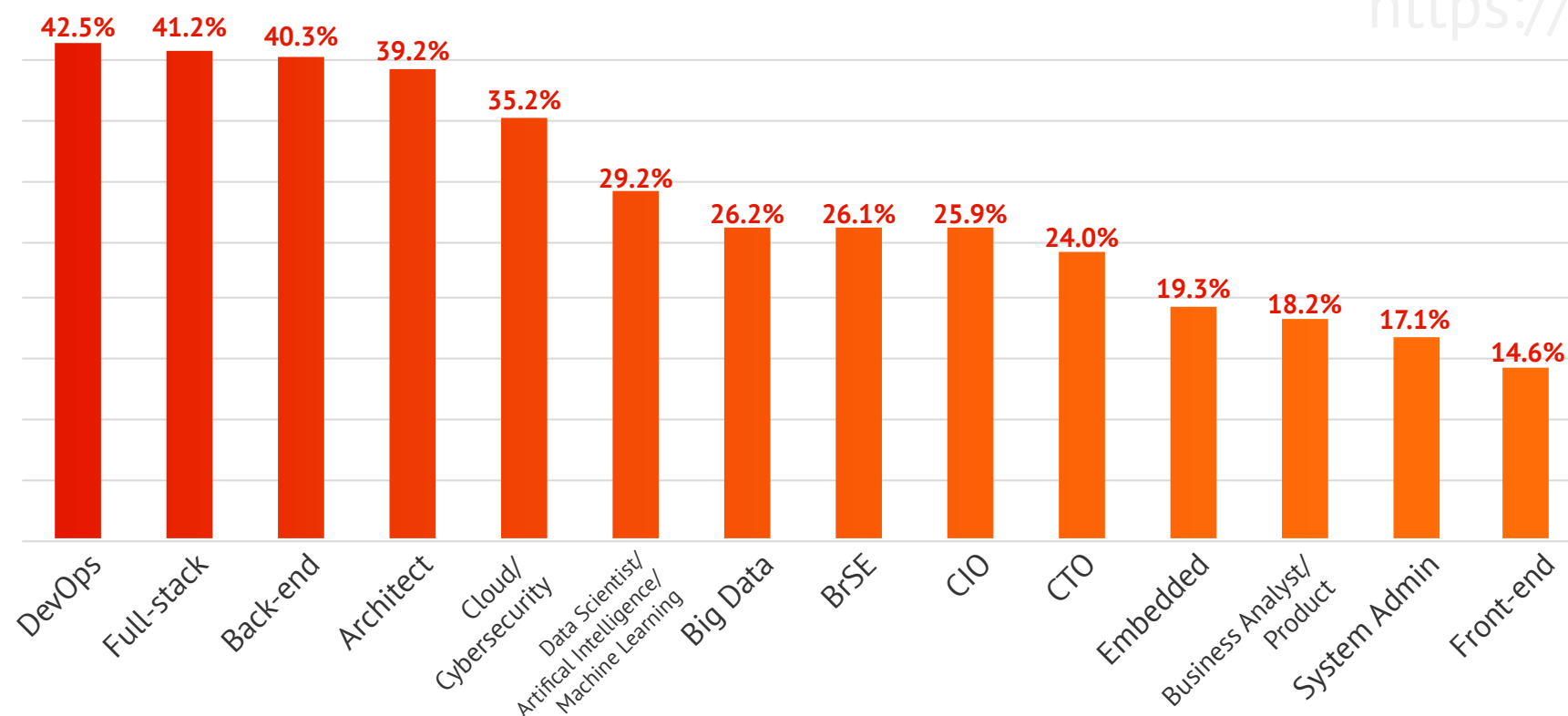


The figure shows that most developers (67%) feel that it is easy for them to change to a new job in the IT industry. While less than 10% (1 out of 10) developers feel a lack of confidence when changing jobs.

<https://topdev.vn>

## IT POSITIONS HARD TO RECRUIT IN 2021

Question: Choose top 5 positions you think that it's hard to find suitable candidates (HR-side only)

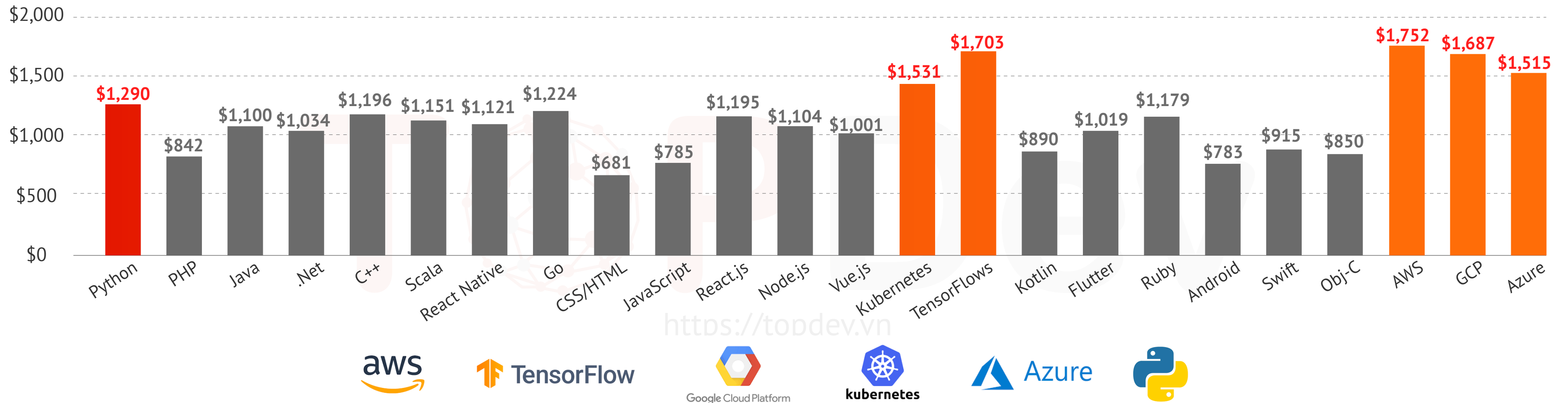


We asked the above question to HR professionals with IT recruitment experience. Most of the answers mentioned 3 positions: DevOps, Full-stack developer and Back-end developer.

Specifically, nearly half (42.5%) of HR/ Recruiters think that by 2021 they will have a hard time finding qualified DevOps candidates to join their company's Tech team in the increasing need of system & architecture management & monitoring.

# DEVELOPER SALARY @TECHNOLOGY

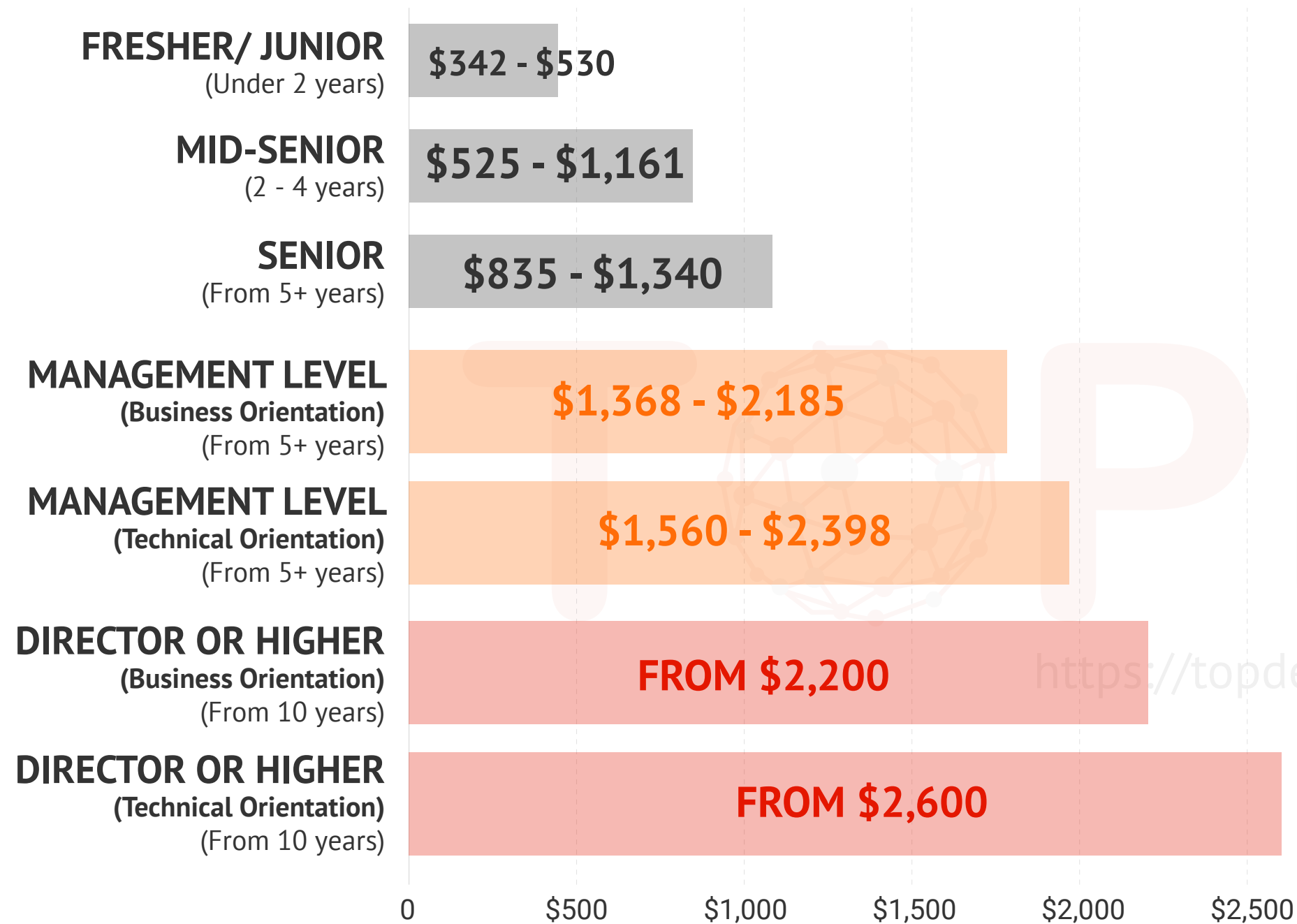
DEVELOPER SALARY BY TECHNOLOGIES  
(relatively up to 3 years of experience)



Top highest-paid tech stacks in the list can be divided into 2 big groups: High tech related to AI/ML trends (Kubernetes, TensorFlows, Python) and Cloud Computing (AWS, GCP, Azure). This is the consequence of worldwide digital transformation as well as significant impact from Covid-19. Following this list, fundamentals technologies related to web, system & mobile development still take the considerably high ranks. While there was a considerable decrease in Mobile old-fashioned skills compared to the beginning of 2010 with "mobile first" wave, new platforms for Mobile Development still claim their value with higher salary base than other common tech stacks.

# DEVELOPER SALARY @LEVEL & INDUSTRY

## DEVELOPER SALARY BY YEARS OF EXPERIENCE



During the first 5 years, developer salaries ranged from \$342 (Fresher) to less than \$1,161 for Mid-Senior. For developers from 5 years of experience, the difference in salary is mainly based on position and responsibility for business operations. Director or higher level will have a salary of at least \$2,200. The salary for a technical management level will be higher than that of a business-oriented manager/ director.

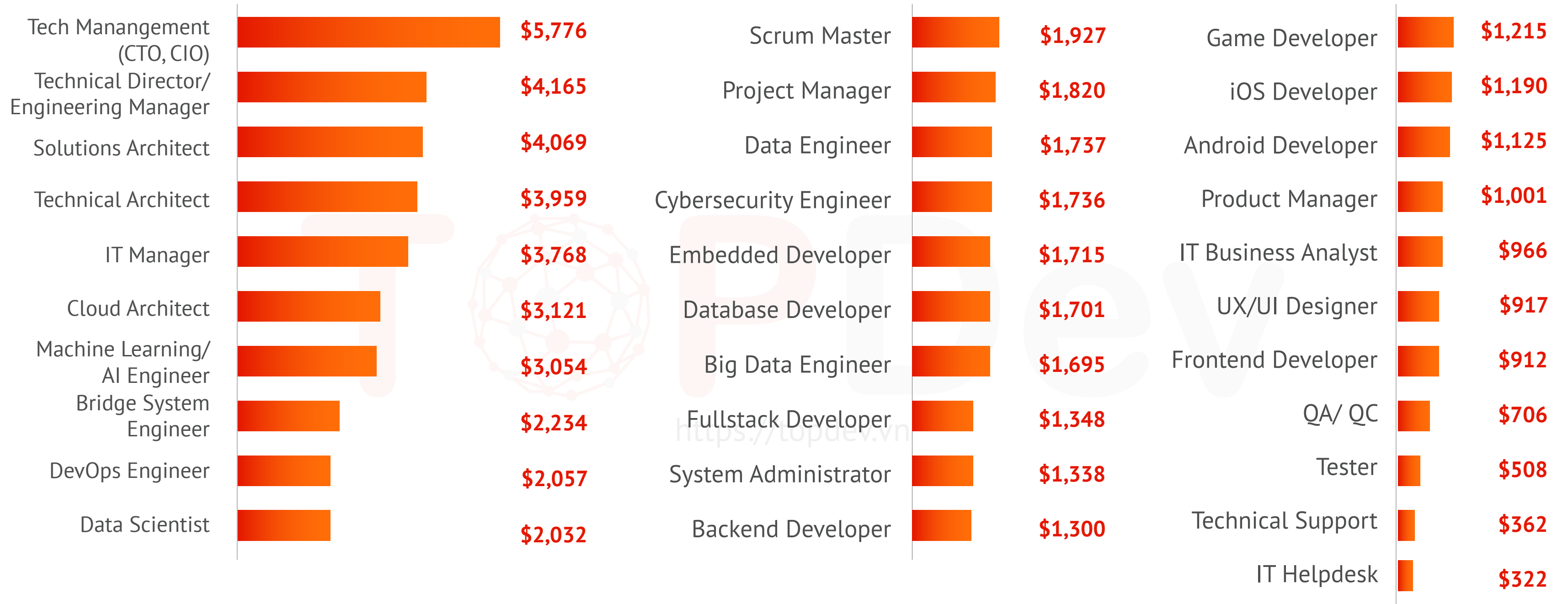
## DEVELOPER SALARY BY INDUSTRIES

- #1 Security
- #2 High Tech
- #3 Fintech
- #4 Software Outsourcing
- #5 IT Service
- #6 Banking
- #7 Telecommunication
- #8 E-Commerce
- #9 Business Service/ SAAS
- #10 Digital/ Media
- #11 Healthcare
- #12 Edtech
- #13 BPO

The top 3 industries with high income currently are Security, High Technology and Fintech. Imported into Vietnam since 2015, High-tech field (AI, IoT, Cloud computing,...) is considered as the key to bring competitive advantage, a mandatory trend in 2021. For Fintech, this is considered a really necessary industry for banks and all corporate governance systems. Despite being in the top industries with high salaries, businesses still face challenges when finding personnel for most IT positions.

# DEVELOPER SALARY @ POSITION

## DEVELOPER SALARY BY POSITIONS

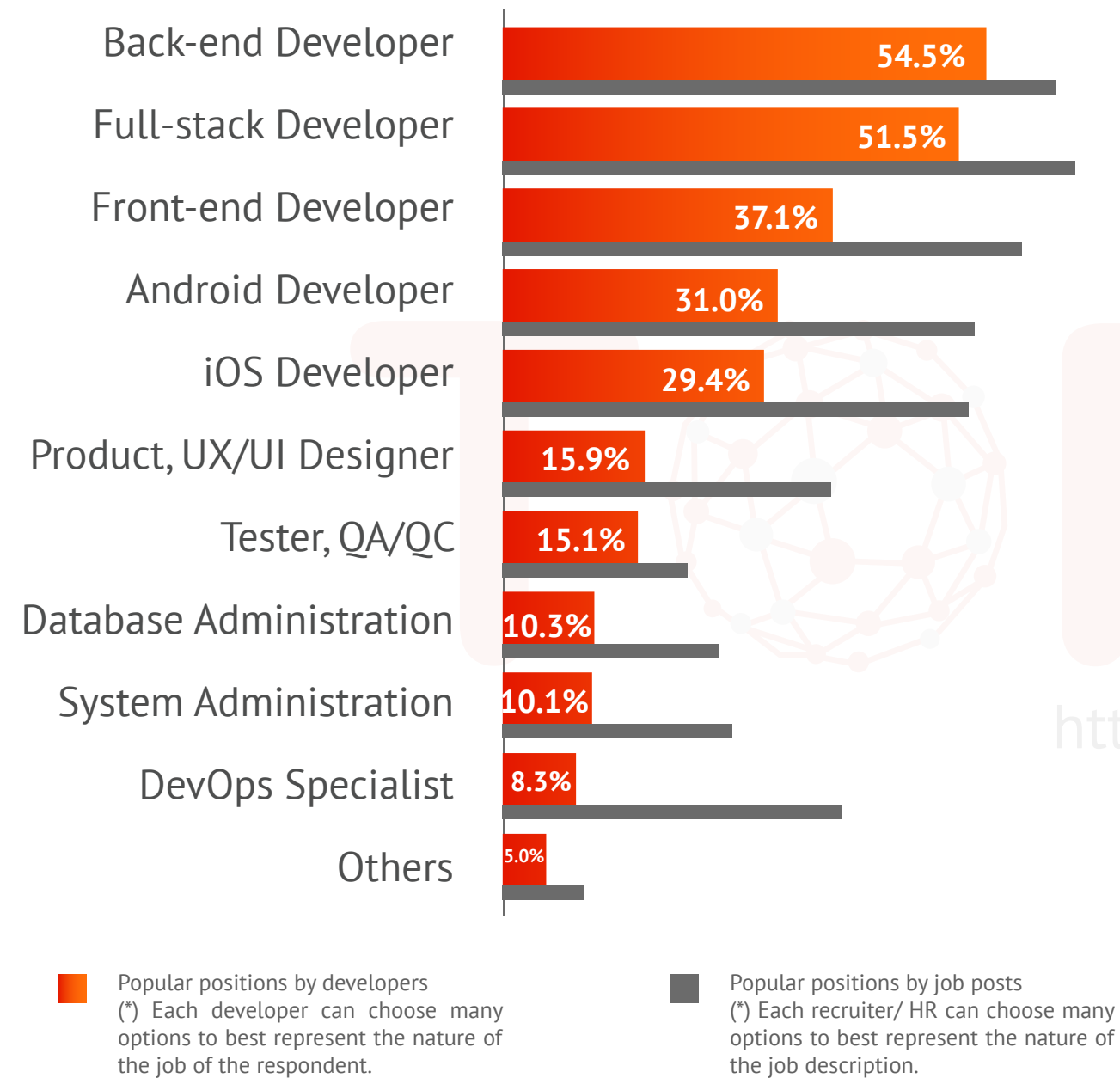


As predicted by the previous reports, highest-paying positions require special skills like Data Analyst, DevOps, Machine Learning or AI. Due to Covid-19 impact which leads to urge for business digital transformation, the importance of Cloud Service & DevOps has played a critical role in maintaining & developing the business. Therefore, there has experienced dramatical growth in demand for Cloud/DevOps engineers which follow with those positions increasingly salary base.

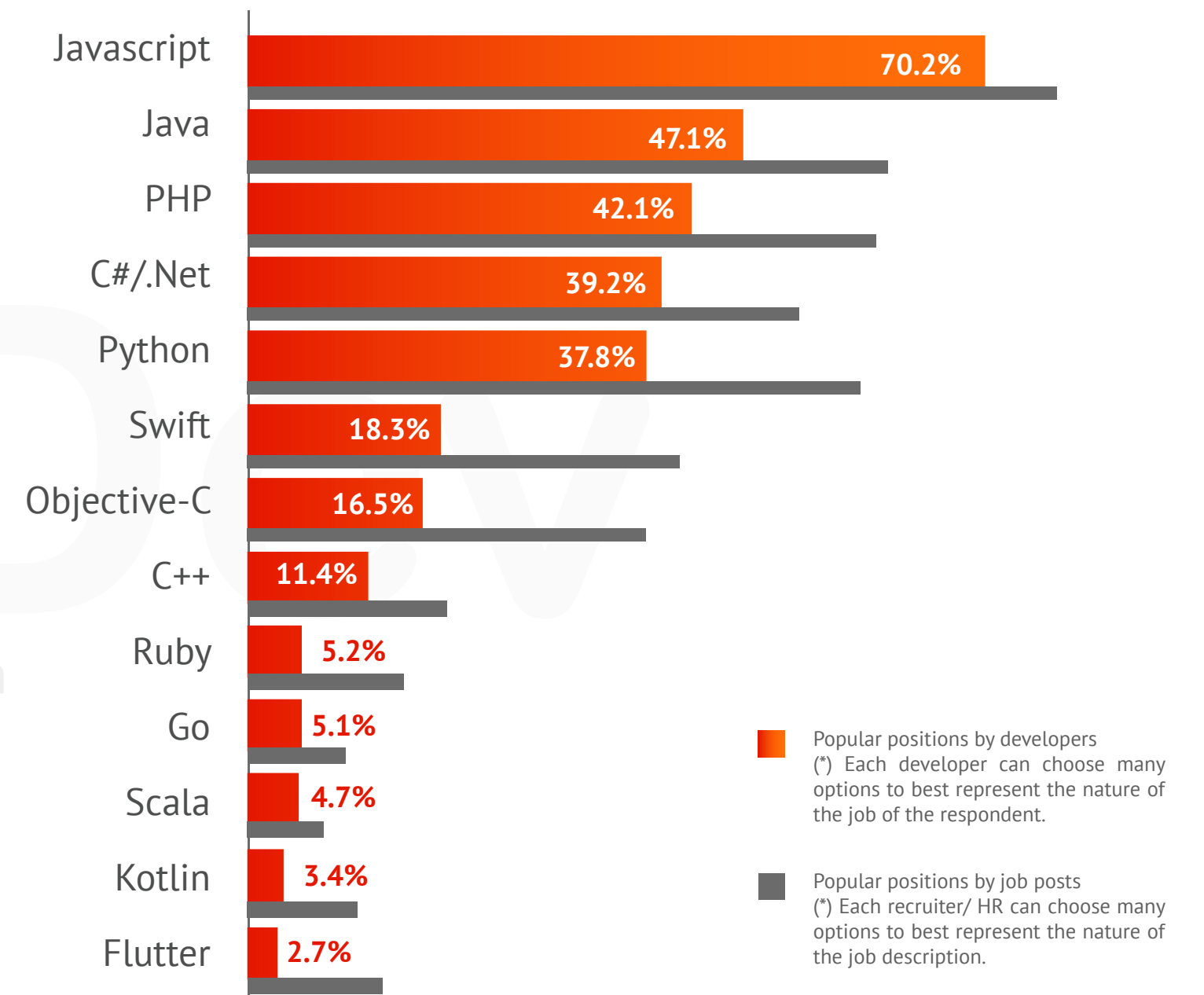
CTO, CIO or Tech Management positions which are still considered the highest career goals with more responsibilities & adaptability to “new normal” era, which now is not limited anymore, ranging from people & performance management, planning & strategies, risk managements, cybersecurity & scalability along with stability. To reach this, managers have to master strong basic skills, handle management tasks, optimize companies’ technology/ technology-based products & on-time adjustment.

# DEMAND FOR IT JOBS & TECH STACK

## THE MOST POPULAR VS ON-DEMAND IT JOBS?



## THE MOST POPULAR VS ON-DEMAND TECH STACKS?



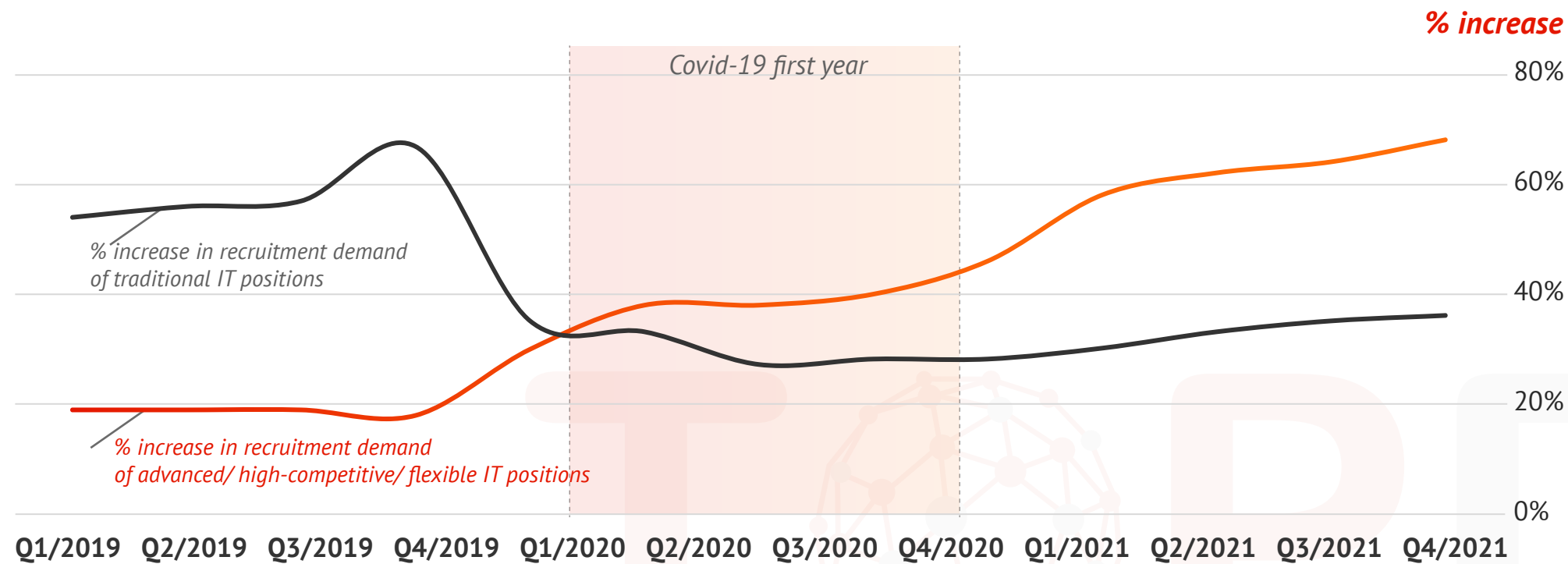
54.5% are Back-end developers, Full-stack Developers ranked 2nd with 51.5%. The dominance of trends and web technologies has pushed the number of Web Developers much higher. Meanwhile, demands on these positions have experienced some significant switch when HR really focuses more on Full-stack & Mobile Developers as well as Product & especially DevOps Specialist.

Despite some changes to the overall popularity of specific tech stacks in Vietnam & region, top 5 IT skills which companies are looking for have remained similar to previous years. More than 70% of companies are looking for JavaScript developers.

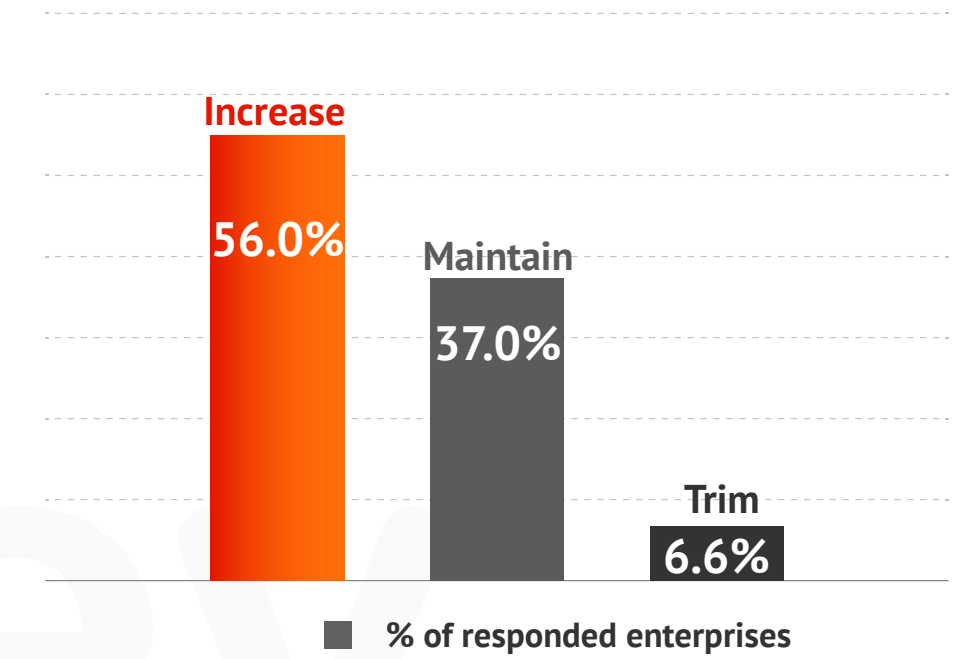


# IT RECRUITMENT STATE CANDIDATE PERSONAS & 2021 TRENDS

## IT RECRUITMENT MARKET BECOMES TOUGHER WITH SIGNIFICANT REQUIREMENT CHANGES



## STATUS OF EMPLOYMENT PLAN 2021 COMPARED TO 2<sup>nd</sup> HALF OF 2020



At the moment, the demand for IT recruitment has gradually been on the rise. Despite changes in the recruiting context & social-economics situation, the IT market average salary has endured a slight impact. However, the market has undergone obvious movements and classifications in IT personnel at different levels. Those who were more flexible and better met businesses' new strict requirements would receive faster average salary increases than the market's. Meanwhile, the demand for this position has increased significantly (more than 20% & increasingly more & more) comparing to the previous period.

## SOFT-SKILL BECOME MORE POPULAR & CRITICAL FOR CANDIDATE EVALUATION



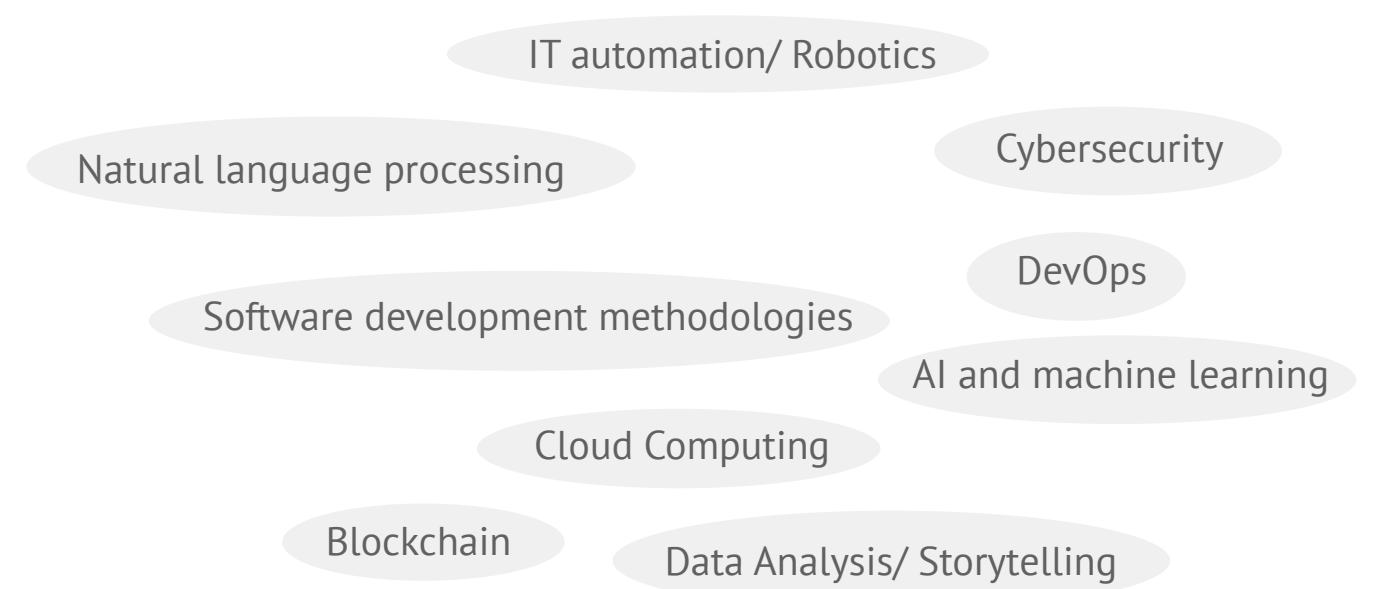
In addition to technical skills, soft skills have become an important criteria in the process of HR/recruiters evaluating IT candidates. Through our survey, top 3 important soft skills for developers include: Adaptability, growth mindset and collaboration/teamwork skill.

It can be said that IT industry with rapid pace of change as well as Covid-19 disruption have created pressure on the adaptability of each developer and required them to have a suitable mindset about development to protect them from new trends & technologies elimination.

Good competency of communication & cooperation between members of Tech team and with related departments play a key role in the efficient process of business operation and product development.

## DISRUPTIVE TECHNOLOGIES SKILLS TO HIGH IN DEMAND

Covid-19 Is Accelerating The Adoption Of Disruptive Technologies And Creating Business Opportunity



## DEV - WHAT MATTERS MOST TO THE DEVELOPER WHEN CONSIDERING A JOB OFFER?

Question: Apart from salaries, choose top 3 main reasons considering a job offer



The results show that technical challenges/ interesting problems that developers will solve are the factors that motivate them to actively consider new opportunities (57.9%).

Following 2<sup>nd</sup> rank (48.7%) is company's technical stack - the technologies used at the company are also a top concern for developers. Therefore, HR/recruiters need to communicate clearly about the programming language and ecosystem/ platforms used by the company with the candidates.

The third most important factor for developers is the promotion opportunities for developers (accounting for 36.9% of the answers).

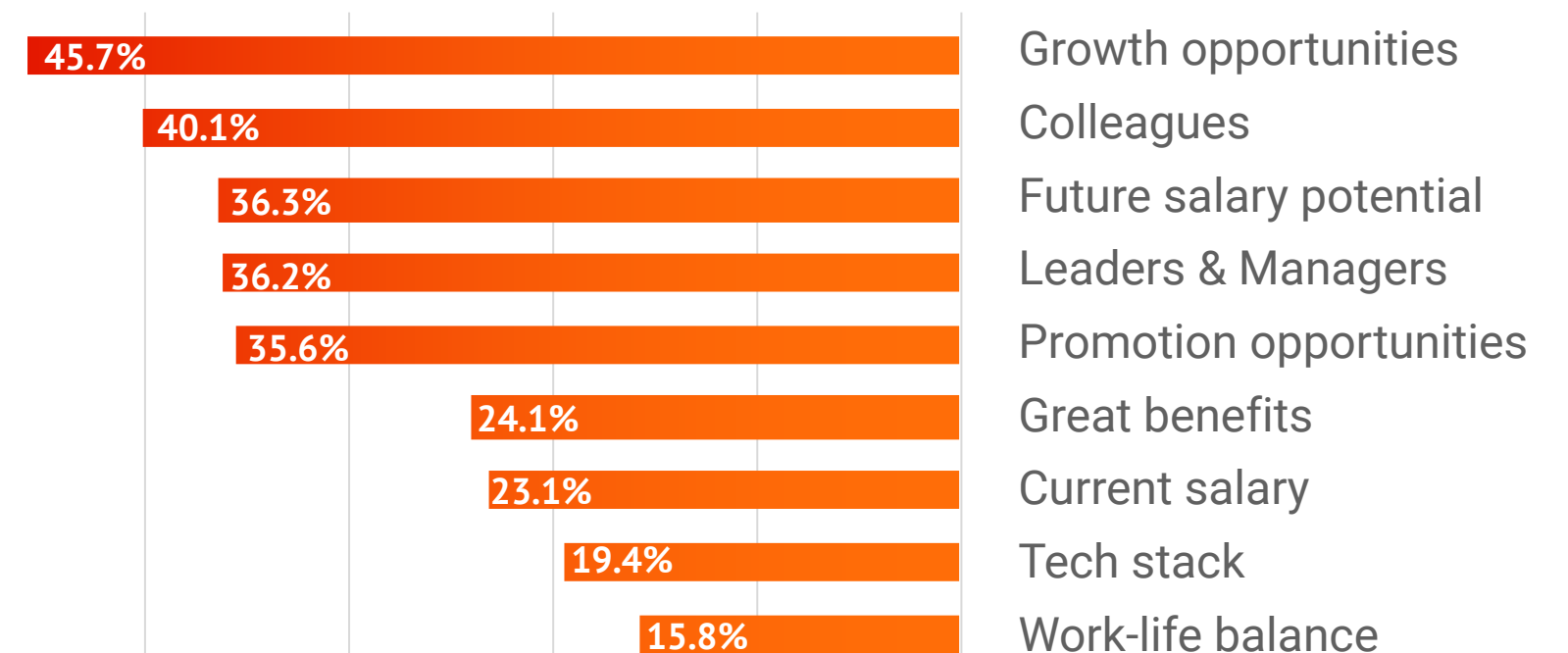
From understanding these developer insights, HR/Recruiter can focus on candidate concerns and devise effective strategies.

## DEV - REASONS FOR DEVELOPERS TO STAY AT CURRENT POSITION

Question: Choose top 3 main reasons staying current position & workplace

Based on the answers of developers participating in the survey. The top factors that help the company retain IT talents include growth opportunities, colleagues & future salary potential.

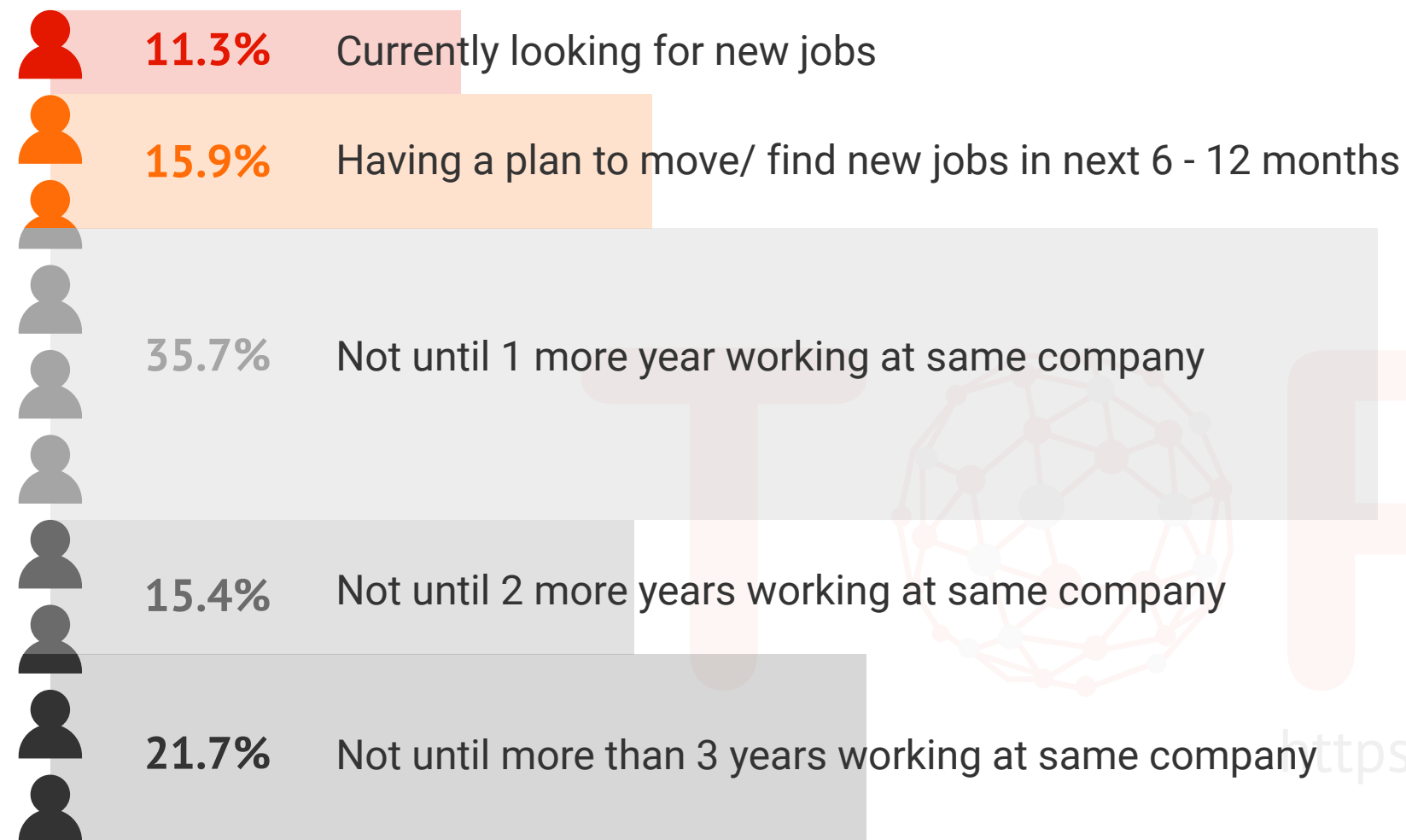
In which, 45.7% of the responses mentioned growth opportunities; followed by Colleagues with 40.1%, 36.3% is Potential Future Salary, 36.2% is Leaders & Managers & 35.6% for Promotion opportunities.





## JOB SEARCHING TIMELINE

Question: When do you think about moving new company?



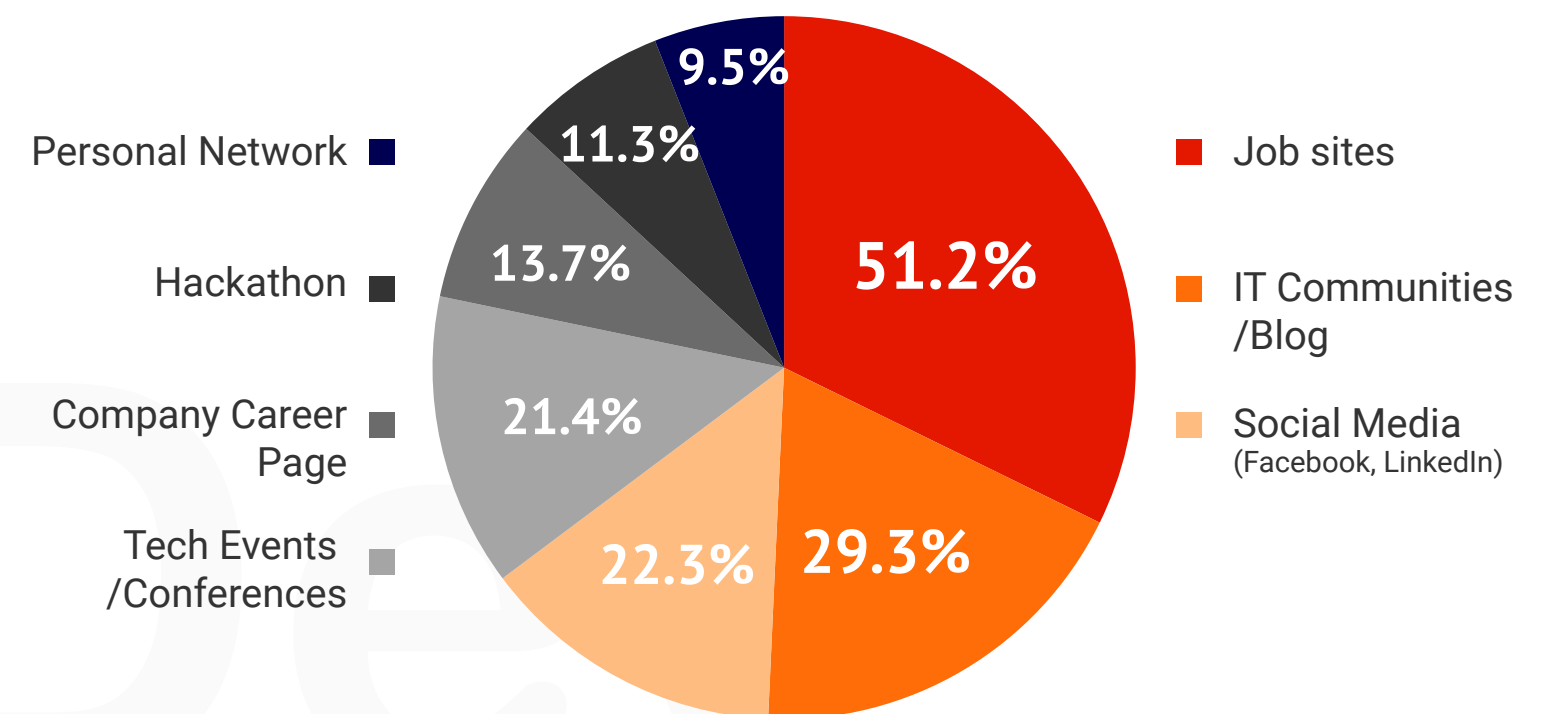
**1 in 4 developers will become active candidates in the next 12 months.**

Only 11.3% of developers are actively looking for a new job; 15.9% plan to move/ find a new job in the next 6-12 months. The rest (72.8%) do not plan to find a new job. In which, up to 35.7% of developers answered that they would spend another year at their current company.

The rest spend 2 to more than 3 years to continue with the current company. It can be seen that developers actively looking for work account for a relatively small proportion of total number of developers in Vietnam, which makes it more difficult for IT recruiters to approach & convert into potential candidates.

## CHANNELS OF FINDING IT JOBS

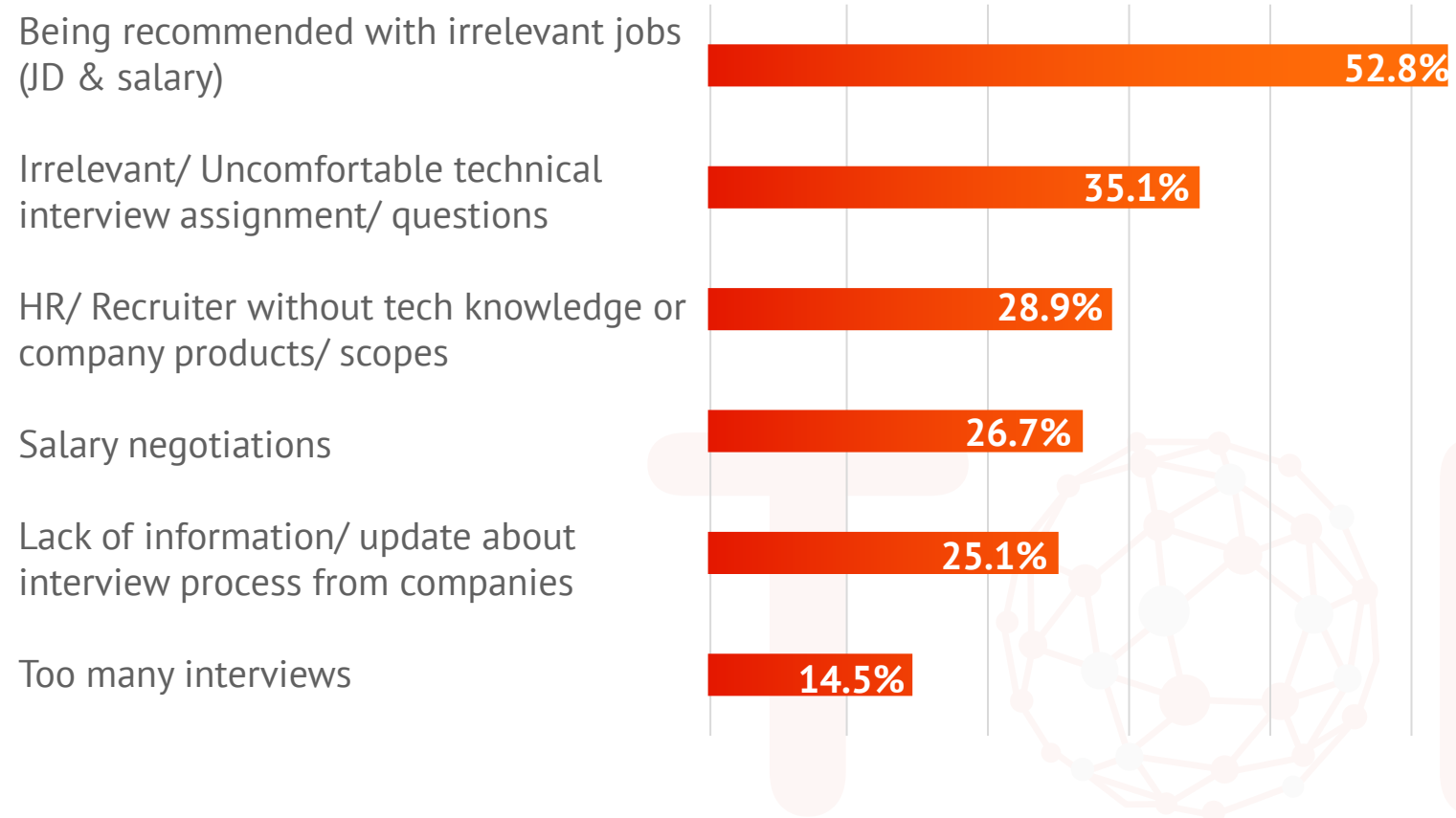
Question: Where you usually find new jobs, choose max 2 options



The results show that job sites are their preferred channels (51.2% of the answers), followed by IT community (29.3%) then social media (Facebook, LinkedIn) (22.3%) and the Company Career Page are also among the top popular job search channels for developers. Hackathon or personal network are not as popular but are also channels that employers can consider when they want to approach and find IT candidates.

Sometimes, a successful recruitment doesn't often go through formal hiring processes, they usually come from employer network (Referral). Recruitment process should be using a standard approach to find and evaluate candidates based on their skill sets. In other words, every referral candidate should go through the same rigorous evaluation & interview process as other candidates. The interview panel should not be influenced by the referral system solely. As a result, by focusing on the candidates' skills rather than introduction, there will be less biases which can help expand the talent pool significantly in the future.

## WHAT DO YOU DISLIKE ABOUT THE RECRUITMENT PROCESS?



## TOP REASONS DEVELOPERS REJECT JOB OFFERS

- #1 Unsuitable offer (role, responsibilities & salary)
- #2 Company Compensations & Benefits
- #3 Lack of growth/ contribution opportunities
- #4 Undesirable tech stack
- #5 Not enough clarity on role & responsibilities
- #6 Lack of working flexibility opportunities
- #7 Undesirable business or technical problem
- #8 Company reputation

With the IT recruitment market becoming more and more competitive today, candidate experience is one of the top factors to help businesses attract and retain talent and enhance Employer Brand at the same.

Candidate experience covers the different stages of the hiring process. Based on the survey results, up to 52.8% of candidates have a bad experience with being recommended with irrelevant jobs (JD & salary). 35.1% of developers don't like it when they have to perform inappropriate technical interview questions or assignment/test.

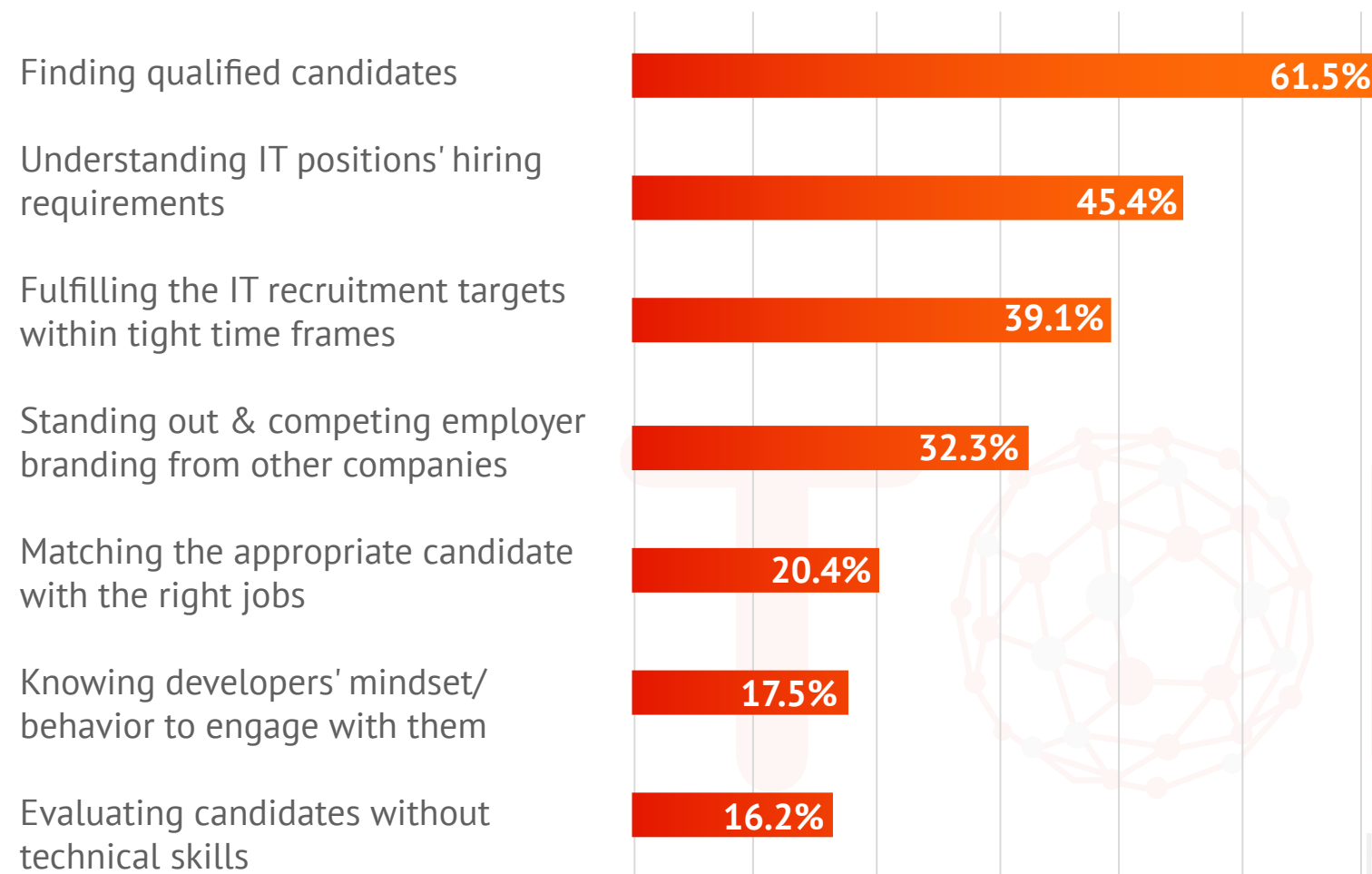
The fact that HR/Recruiter specialists do not have background knowledge about technology or products/service of the company also creates a bad feeling for developers. Experiencing salary negotiation without being provided with enough information about the hiring process or having too many rounds of interview also make for a bad experience for candidates.

Top 3 reasons why developers reject a job offer: Unsuitable offer (role, responsibilities & salary), compensations & benefits policy and lack of growth/ contribution opportunities at the company.

Some other issues that employers should also pay attention to: Undesirable Tech stack, unclear roles & responsibilities of the position, lack of working flexibility, undesirable business/ technical issues and ultimately the company reputation.

# HR/ IT RECRUITER CONCERNS

## HR - WHAT ARE MAIN CHALLENGES WHEN RECRUITING DEVELOPER?

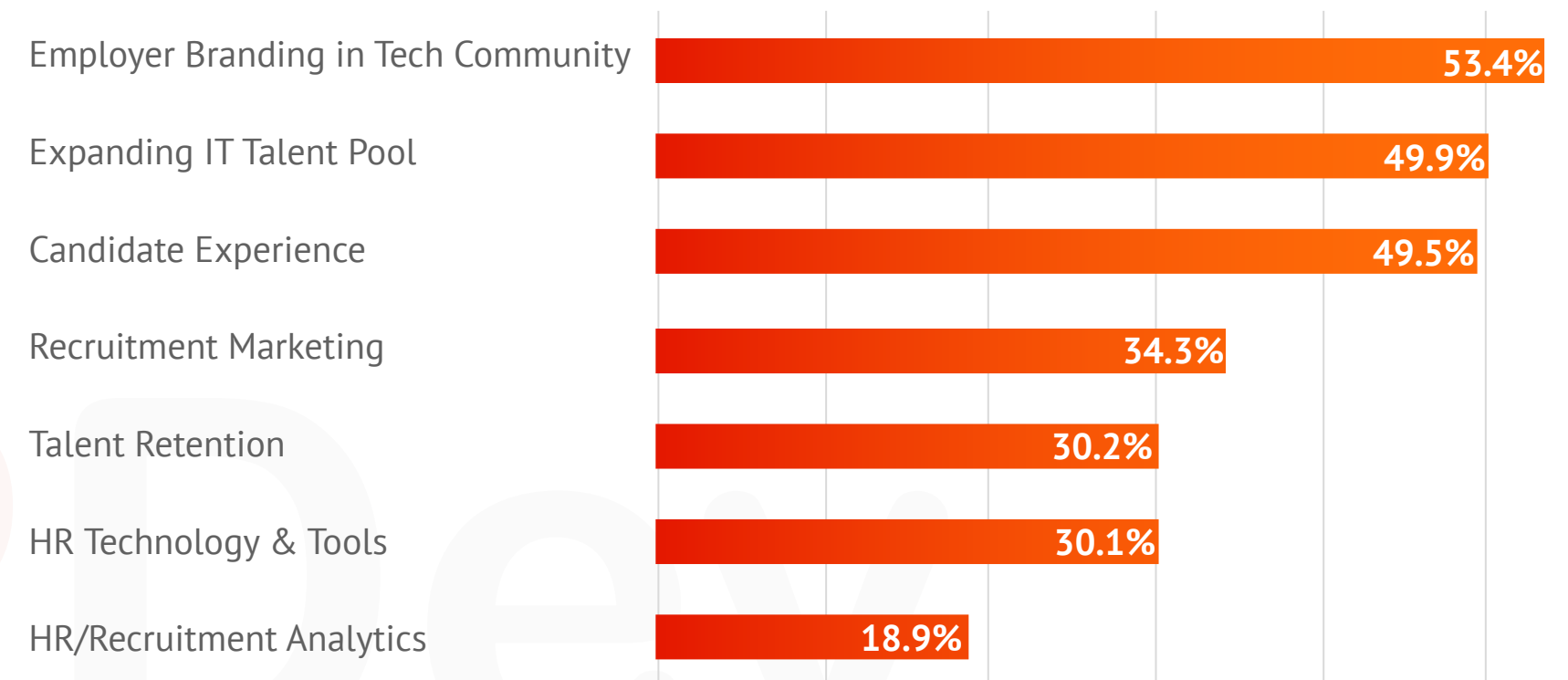


The fact that the number of trained programmers each year is not enough to meet the increasing demand for IT personnel has created many challenges and competition for the IT recruitment industry. The HR professionals who participated in the survey mentioned most difficulties when in charge of recruiting developers. Specifically, up to 61.5% of HR/Recruiter answered that they had difficulty in **"Finding qualified candidates"**, followed by **"Understanding IT positions hiring requirements"** (45.4%) and **"Fulfilling the IT recruitment targets within tight time frames"** (39.1%).

Other challenges are also mentioned such as: "Standing out & competing employer branding from other companies", "Matching the appropriate candidate with the right jobs", "Knowing developers' mindset/ behavior to engage with them" and "Evaluating candidates without technical skills".

The truth is that the supply of human resources in IT field still doesn't meet the needs of demands and the expected growth rate of the industry. In 2021, technology companies should continue to compete much harder to fill an increasing number of IT positions in shorter time.

## HR - WHAT DO YOU PLAN TO INVEST IN/ DEVELOP IN 2021 FOR CANDIDATES (HR SIDE)



The survey results revealed that the top priority of IT HR/Recruiters in 2021 is to build employer brand in the technology community (accounting for 53.4% of the answers).

Among the top 3 priorities also includes: Expanding IT Talent Pool and Improving Candidate Experience. In addition, some HR really focus on improving Recruitment Marketing, Talent retention plans and leveraging HR technology /tools together with hiring data analysis.

The past time has brought not only challenges and a series of new behaviors of experimenting and lessons learned for all fields. In a context where change is the only thing that remains constant, adaptability is arguably the most influential skill any employer needs to hone and develop.

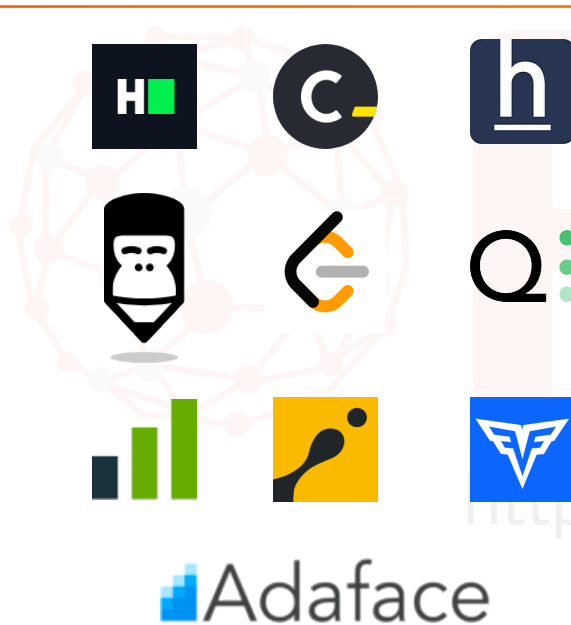
## 01 TECHNICAL/ PERSONALITY ASSESSMENT TOOLS/ METHODOLOGIES

Question: Which kinds of technical assessment tests do you think are acceptable as part of the tech recruitment process?

### FORMATS

- Assessment tests with real-life problems/ projects
- Live/ Onsite coding interviews
- Pair Programming Session
- Competitive technical contest with challenges/ games
- Whiteboard coding tests
- Take-home assessment tests

### TOOLS



Some popular personality tests: MBTI, 16Personalities, Enneagram.

## 02 MOBILE JOB SEARCHING

Companies/ Platforms should optimize performance on mobile devices via career websites, job postings, application process.

**89%**  
JOB SEEKERS

think that **mobile devices** play a critical role in the job-searching habit

**45%**  
JOB SEEKERS

search for jobs daily on their mobile devices

**59%**  
JOB SEEKERS

save a job from company career page/ job sites from their mobile device and later on apply

## 03 CANDIDATE EXPERIENCE

Poor candidate experience negatively impacts your employment brand.

**75%**

of candidates never hear back from a company after sending an application

**60%**

of candidates say they've gone for interviews and never hear back from the company

**42%**

of disgruntled candidates will not apply for any positions at the company again

**22%**

will tell others not to apply to the company and 9% will ask others to boycott products/ service

- ✓ Make sure you're hiring to fill a real need
- ✓ Write clear job descriptions
- ✓ Make it easy for candidates to apply to your jobs
- ✓ Early and often follow-up
- ✓ Communicate with (and thank) candidates during each step of the hiring process
- ✓ Give candidates information about what to expect at in-person interviews
- ✓ Give candidates your full attention during interviews
- ✓ Tell candidates if you're no longer considering them, as soon as you can
- ✓ If you want to keep certain candidates in mind for future openings, keep track of them
- ✓ Be open to giving (and receiving) feedback

## 04 SOCIAL RECRUITING

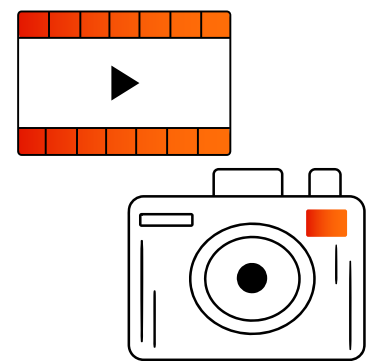
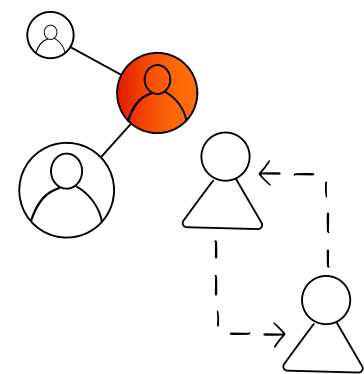
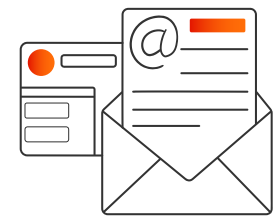
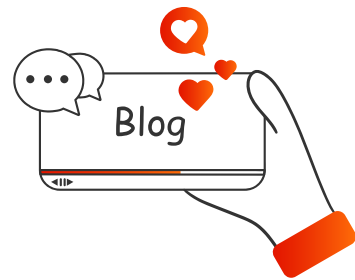
The process of using social networks to find, attract and recruit potential candidates.

As of 2021, up to 70% of the population in Vietnam uses social networks and this number is still increasing in the future. Embracing this trend, recruiters have quickly implemented plans to reach candidates through social media channels: Facebook, Youtube, major forums and recently Tiktok. However, with relatively low costs and no restrictions on recruiters, recruiting on social media is increasingly popular and competitive. TopDev will suggest you some tips when recruiting through Social Media that any size or type of business will need:

- Build a content strategy checklist
- Ask questions to clarify and determine the right Social Media strategy
- Build and maintain interactions with candidates
- Keep a close eye on your competitors.
- Hashtags: Why not?
- Livestream - A formidable weapon
- Build a two-way conversation with the candidate. Build a content strategy checklist

## EMPLOYER BRANDING

05 Make Employer Branding as key opinion leader to express your company value & integrity.



Useful programming knowledge

Real case studies from the company

Lessons learned and inspiration from industry leaders

In-depth technical sharing from the dev team as well as the working environment and culture...

To promote the Employer Brand, companies also need to pay attention to attracting passive candidates. And Digital Channels won't be missed, ranging from Blog, Company Page, Email marketing to Social Media channels. When using these channels, the first thing is to gather & target the right candidate audience. The second point that employers need to pay attention to is the creation of attractive content. To have successful employer branding campaigns, businesses need to balance the two factors above. In addition, businesses can also make recruitment brands through technology events - where a large number of potential candidates converge.

This is the time when businesses take advantage of opportunities and efforts to bring their brand image to the outside, giving developers feeling of closeness and friendliness and helping them know better about the company and development opportunities given by the company.

Tech Events/ Conferences

Hackathon/ Contest/ Games

Vietnam Web Summit

Vietnam Mobile Day

TechFest

Code Tour

### Employer Branding orientation changes

People are looking for resources and ways to deal with the pandemic, so engagement with Covid-19 posts from companies has been significantly higher than with regular posts. That engagement has also increased over time as people pay more and more attention to what companies are saying and doing about the Covid-19 situation.

It can be said that the above situation is an opportunity for employers to show their responsibilities and support not only to current employees but also to future talents. While no one can accurately estimate how long the current upheaval will last, expressing solidarity, empathy, and concern for employees in a genuine way will help build a recruiting brand. echoes, positive feelings about the business.

Carefully considering the Employer Branding in relation to industry changes. Old messages may change and will be no longer effective, leading to a refinement in the IT talent recruitment strategy. "What do my business need to change? How can we tell our story differently?" shall be some recommended questions for you to consider.

Take a close look at the candidate's behavior and new trends, see how these behaviors vary and consider whether it's a long-term trend or not, because this will change a lot about how the strategy works in the upcoming recruitment schedules.

## GENERATION ISSUE:

### GEN Z & MILLENNIALS - MAJOR LABOR FORCE

*It's no surprise that generally, Gen Z is more tech-savvy than any other generation. They were born in the era of the Internet boom with the beginning of the World Wide Web and its continuous development, so Gen Z using the Internet as a tool to work, research and connect with other people is obvious.*



Tech-savvy  
Doesn't like risk  
An independent generation  
Competitive mind  
Honesty appreciation

## MILLENNIALS & GEN Z

If in the world in the next 5 years, Millennials will account for 3/4 of the global workforce, then in Vietnam, also in the next half decade, up to 1/4 of the national workforce will belong to the Z2 generation. So it's no wonder that these two generations' huge pool of candidates make up more than a third of the workforce (38%) and are projected to grow to 58% over the next 10 years. A future where younger generations will dominate the workplace doesn't seem far away.

Although Millennials and Gen Z bring a lot of positive value and potential for the company's growth, many businesses still find it difficult to attract developers of these two new generations, such as: they easily notice that the job opportunities offered do not match their needs, recruiters failure to communicate with the candidates about the cooperation, the lack of investment in training and career development for them, etc.

### Mindset and habits at workplace

Millennials and Gen Z "transform" every day in a world defined by two words "change". Changes in technology, employer requirements, etc motivate them to continuously improve themselves to maintain their competitiveness, thereby not being overshadowed by other candidates. In addition, their "inquisitiveness" and well-honed skill groups, which are the result of independent and self-directed learning, have proven their outstanding ability to managers.

### Teamwork

Teamwork is one of the clear evidences showing the difference between Millennials and Gen Z. Millennials for opportunities for cooperation and teamwork are always welcomed by Millennials because they follow the motto "Two are always better than one. themselves", Gen Z believes that if you want to get the job done effectively, it's best to "self-advocate".

### Level of commitment with the businesses

The majority of young employees like Millennials and Gen Z have a lower level of commitment to the company than previous generations, they are more loyal to individuals such as superiors or colleagues than to the company they work for. In addition, they also value the balance in their personal and work lives, deadlines and leisure, as well as the comfort level of the work environment.

# SURVEYED DATA/ REPORT FOUNDATION

**45,201**  
IT candidates

**100,000**  
analyzed  
job data

## DEVELOPERS

Full-time Developers	75%
IT Students	9%
Unemployed	2%
Freelancer/ Self-employed	6%
Part-time Developers	8%

**2,300**  
IT  
Employers

## HR

Talent Acquisiton	14%
Talent Acquisiton (Leader/ Manager)	2%
HR General	26%
Recruiter	23%
IT Recruiter	18%
Employer Branding Executive	3%
Sourcer	4%
Learning & Training	1%
Admin/ Office Staff	2%
HR (Leader/ Manager)	7%

## METHODOLOGY

TopDev conducted a survey & research to find out more about developers' demographic, skills, work experience and job search behaviour as well as IT Recruitment Market in Vietnam. A total of 53,219 people took part in survey and more than 100,000 IT jobs data analyzed seperately from August to December 2020 via TopDev ecosystem, in which 6,718 responses & 15.3% data were invalid due to irrelevant experience or low creditability in IT industry.

Data was anonymised in accordance with GDPR guidelines and is stored separate and only used for reports analysis. Percentages may not always add to 100% due to mutliple choices & different responding behavior. All salary data stated in this report refers to gross salary before tax and excludes other benefits like overtime, bonus, etc.

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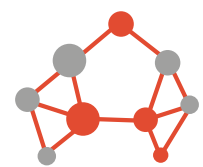
<https://www.gso.gov.vn/en/data-and-statistics/2021/01/viet-nam-economy-in-2020-the-growth-of-a-year-with-full-of-bravery/>  
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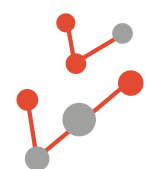
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### MISSION

#### MAKE IT VIETNAM BETTER



**Accelerate** Vietnamese IT human resources in both quality & quantity via communities, events/ activities & education



**Supply** IT companies with best sources of developers & build long-term employer branding



**Connect Developers** with best vacancies from verified IT companies in all industries

### INTRODUCTION

- Top IT recruitment platform in Vietnam with more than 300,000 Developer Profiles
- The pioneering and one-of-a-kind unit in the IT sector in Vietnam helps building and developing Recruitment Brand – Employer Brand for hundreds of local & international companies
- The prestigious unit specializes in conducting surveys, analyzing and releasing quarterly/annual reports about IT market and IT human resources in Vietnam
- The Organizers of the 2 largest scale technology events in Vietnam: Vietnam Mobile Day and Vietnam Web Summit
- The largest Developer Community in Vietnam

### CREDENTIALS

**350,000**

IT Profiles

**577,300**

IT Followers

**4,370,317**

Social Engagement To Developers Monthly

**13,075,100**

Social Reach To Developers Monthly

# Thank you

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Developers Recruitment State

**2021**

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