

DEVELOPING THE DIGITAL ECONOMY IN VIETNAM: CURRENT SITUATION, BARRIERS AND POLICY DIRECTIONS

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Received: 02/3/2026; Reviewed: 13/3/2026; Revised: 17/3/2026; Accepted: 26/3/2026

DOI: <https://doi.org/10.58902/tcnckhpt.v5i1.355>

Abstract: *The digital economy is emerging as a key driver of growth and a crucial factor in enhancing national competitiveness. In Vietnam, this sector has been expanding rapidly, contributing 18.3% of GDP in 2024 and rising to 18.72% in the first half of 2025, with notable progress in e-commerce, digital payments, and e-government. However, the development of the digital economy still faces numerous barriers. Internally, major challenges include a fragmented digital infrastructure, an incomplete legal framework, shortages of high-quality human resources, traditional consumer habits, and limited digital transformation capacity among small and medium-sized enterprises. Externally, Vietnam's digital economy remains highly dependent on international technology platforms and FDI inflows, while confronting regional technological gaps and cross-border cybersecurity risks. This article analyzes the current state of the digital economy, assesses the impacts of these barriers on the public sector, businesses, society, and individuals, and proposes directions and solutions to achieve the target of the digital economy accounting for 30% of GDP by 2030, in line with Resolution No. 57-NQ/TW (2024) of the 13th Politburo.*

Keywords: *Digital transformation; Digital economy; Barriers; Impacts of barriers; Vietnam.*

1. Introduction

In the era of globalization, the digital economy has emerged as a key driver of national development. The World Economic Forum (WEF) projects that by 2030, it could account for about 70% of global value added. With a young population, high internet penetration, and rapid urbanization, Vietnam is regarded as one of the most dynamic digital markets in Southeast Asia (World Bank, 2023).

The strategic role of the digital economy has been affirmed in major policy frameworks, including Resolution No. 52-NQ/TW (2019) on the Fourth Industrial Revolution and Resolution No. 57-NQ/TW (2024) on developing the digital economy and digital society by 2030, with a vision to 2045. These policies underline the commitment to making the digital economy a pillar of national development, with the goal of placing Vietnam among the world's top 50 countries in e-government and digital economy by 2030.

However, significant barriers remain. According to the Ministry of Information and

Communications (2025), despite maintaining annual growth rates above 20%, Vietnam's digital economy faces challenges such as fragmented infrastructure, dispersed data systems, an incomplete legal framework, shortages of skilled labor, and weak digital culture and consumption habits. Small and medium-sized enterprises (SMEs), which constitute 97% of all firms, struggle with digital transformation, while external pressures include dependence on cross-border platforms, technological gaps with regional leaders, and rising cybersecurity risks.

Against this backdrop, a systematic analysis of barriers, their impacts, and state-led policy solutions is both urgent and essential, with implications for theory and practice.

2. Research overview

The digital economy is understood as the entirety of economic activities based on digital technologies, encompassing both core digital industries—such as information technology, telecommunications, cloud computing, and artificial intelligence—and traditional economic

sectors that leverage digital technologies to enhance production, business operations, and governance efficiency (OECD, 2022). According to Resolution No. 57-NQ/TW of the Politburo, Vietnam's digital economy comprises (i) digital technology industries, (ii) e-commerce, (iii) platform economy, and (iv) traditional economic sectors applying digital technologies (Politburo, 2024).

Recent studies by the World Bank (2023) assert that the digital economy is a key driver of growth for developing countries. However, these studies also emphasize that its development heavily depends on three critical prerequisites: digital infrastructure, institutional and legal frameworks, and the quality of human resources (Google, Temasek & Bain, 2024).

Domestically, numerous studies and scientific reports have addressed barriers to digital economy development. For instance, Nguyen Trong Duong (2020) highlights in his work on national digital transformation that the most significant barrier is the institutional and legal framework, which has not kept pace with digital technology developments, particularly in areas such as e-commerce, digital data, and cross-border services. The Central Institute for Economic Management (CIEM, 2021) also identifies regional disparities in digital infrastructure, alongside limited access to capital and technology for small and medium-sized enterprises, as prominent challenges. More specialized research, such as that by Nguyen Quang Dong (2022) at the Institute for Policy and Media Development (IPS), analyzes barriers from the perspective of data governance and digital trust, arguing that inconsistent and non-transparent regulations regarding data privacy and sharing have undermined citizens' and enterprises' confidence in engaging with digital platforms. Additionally, Nguyen Thi Thu Hien and colleagues (2022), published in the *Journal of Economics and Forecasting*, focus on digital human resource challenges, noting both the shortage of high-skilled labor and the limited basic digital skills among the general workforce.

From a macro-strategic perspective, the "Digital Economy and Digital Society Development Plan" (Ministry of Information and Communications, 2022) identifies key barriers,

including (i) lack of coordination in policy implementation across ministries and agencies, (ii) limitations in investment resources for digital infrastructure, and (iii) low digital readiness among many business groups. These reports collectively suggest that Vietnam's digital economy has yet to catch up with leading countries in the region due to the simultaneous presence of both endogenous and exogenous constraints.

However, a common limitation of domestic studies is that most remain based on short-term surveys, qualitative analyses, or case studies. Policy impact assessments are often descriptive and fragmented, lacking comprehensive, long-term, quantitative research that could provide actionable recommendations. This gap highlights the need for further studies to provide scientific foundations for policy formulation, adjustment, and improvement in Vietnam's digital economy development in the current context.

In Vietnam, barriers to digital economy development can be broadly categorized into two groups: internal (endogenous) barriers, such as limitations in infrastructure, institutions, human resources, digital culture, and enterprise capabilities; and external (exogenous) barriers, including dependence on international technology platforms, FDI inflows, technological gaps relative to regional peers, and cross-border cybersecurity threats.

From the perspective of state management, researching these barriers is crucial for identifying challenges, assessing their impacts, and proposing suitable solutions aligned with the national strategy for digital economy development.

3. Research methods

This study adopts a qualitative approach combined with quantitative analysis. Specifically:

- *Document analysis and synthesis*: Collection and review of secondary data from official reports by the Ministry of Information and Communications (2023–2025), resolutions of the Communist Party of Vietnam, and international studies from OECD, World Bank, and Google–Temasek & Bain.

- *Classification and systematization of barriers*: Based on theoretical and practical frameworks, barriers are categorized into internal

and external groups.

- *Multi-dimensional impact analysis:* Assessment of how these barriers affect four key stakeholders: the public sector, enterprises, society, and citizens.

- *Solution proposals:* Tailored to each barrier, with clear delineation of responsibilities among stakeholders (government, enterprises, society, and citizens), ensuring feasibility and alignment with Vietnam's context.

4. Research results

4.1. Current status of digital economy development in Vietnam

In recent years, Vietnam's digital economy has expanded rapidly, becoming a key driver of economic growth and development transformation. According to the Ministry of Information and Communications (2025), the digital economy accounted for 16.5% of GDP in 2023, rose to 18.3% in 2024 (equivalent to about USD 36 billion), and reached 18.72% in the first half of 2025. This growth rate, consistently above 20% annually, significantly outpaces overall GDP growth, reflecting the dynamic trajectory of Vietnam's digital economy.

Among its components, e-commerce has shown the strongest momentum. In 2024, Vietnam's e-commerce market reached USD 25 billion, up 20% from 2023, ranking among the world's ten fastest-growing markets (Google, Temasek & Bain, 2024). In the first half of 2025, online retail revenue exceeded VND 202.3 trillion, a 41.5% year-on-year increase (Ministry of Information and Communications, 2025). This boom has been driven mainly by cross-border platforms such as Shopee and TikTok Shop, while domestic platforms like Tiki and Sendo continue to face challenges in competitiveness.

Digital payments have also made remarkable progress. In major cities such as Hanoi and Ho Chi Minh City, non-cash transactions account for nearly 78%, signaling a gradual shift in consumer behavior. Digital banking services, e-wallets, and electronic identification (VNeID) are increasingly widespread, reshaping payment and consumption practices.

In the area of digital government, Vietnam has made notable advances. By mid-2025, over 80% of public services had been provided online at levels 3 and 4, exceeding the national target,

with more than 55 million VNeID accounts activated (Ministry of Information and Communications, 2025). These efforts have enhanced administrative efficiency, reduced costs, and facilitated access to public services for citizens and businesses.

The digital technology industry has also seen robust growth, generating revenues of VND 2,289,627 billion in the first half of 2025, up 21% compared with the same period in 2024. Software exports and IT services continued to expand, reinforcing Vietnam's position as a regional hub for software outsourcing (Ministry of Information and Communications, 2025).

Despite these achievements, several limitations remain. First, while Vietnam's digital economy is growing rapidly, its GDP contribution remains lower than that of regional leaders such as Singapore and Malaysia, where digital sectors account for over 25–30% of GDP (World Bank, 2023). Second, the economy remains heavily dependent on foreign platforms and technology companies, creating imbalances in the domestic digital ecosystem. Third, regional disparities persist in access to digital infrastructure, with many remote areas lacking high-speed Internet coverage. Fourth, the shortage of high-skilled digital talent continues to hinder progress in advanced fields such as artificial intelligence, big data, and cybersecurity.

Overall, the current status of Vietnam's digital economy reflects both strong progress and pressing challenges. These realities provide the foundation for identifying structural barriers and formulating targeted solutions to achieve the national goal of expanding the digital economy to 30% of GDP by 2030.

4.2. Barriers to digital economy development in Vietnam

4.2.1. Internal barriers

- *First, the digital infrastructure remains fragmented and lacks inclusiveness.* Despite progress in Internet penetration and 5G deployment, significant disparities persist between urban and rural areas. While broadband access is widespread in major cities, mountainous and remote provinces still face limited connectivity, creating "digital poverty" and excluding parts of the population from digital transformation. Moreover, national data

infrastructure is fragmented, with poor interoperability across ministries and localities, leading to “data silos” that hinder governance and innovation. Logistics – a backbone for e-commerce – also lags, raising transaction costs and reducing the competitiveness of domestic enterprises.

- *Second, institutional and legal frameworks have not kept pace with technological change.* Emerging business models such as fintech, block chain, cloud computing, and artificial intelligence lack comprehensive regulation. Current provisions on e-transactions, cybersecurity, and personal data protection remain overlapping and inconsistent, creating “legal grey zones” that expose firms to risks and complicate state supervision. A notable consequence is the absence of an effective digital taxation mechanism, causing revenue loss from cross-border platforms and weakening market fairness.

- *Third, digital human resources are insufficient in both quantity and quality.* According to the Ministry of Information and Communications (2024), demand for big data, AI, and cybersecurity specialists has grown by 20–25% annually, yet training systems lag behind. Many universities remain theory-oriented, with limited practice and industry linkages. As a result, firms must invest in retraining or rely on foreign experts. Skill gaps across labor groups also widen inequality in access to digital jobs.

- *Fourth, digital culture and consumption habits remain underdeveloped.* A considerable share of the population, especially in rural areas, still prefers cash and is reluctant to use digital services. Online trust is undermined by fraud, fake news, and data breaches. Without trust, the adoption of e-payment, e-commerce, and online public services is constrained. This indicates that digital economy development is not only about technology but also about cultural and behavioral change.

- *Fifth, SMEs face limited digital transformation capacity.* Although SMEs account for 97% of all enterprises, most lack capital, technology, and skilled staff to invest in digitization. High initial costs and unclear short-term returns make many reluctant to prioritize digital transformation. This delay weakens not

only their competitiveness but also the overall digital ecosystem, since without SME participation, digital supply chains cannot develop in a comprehensive manner.

4.2.2. External barriers

- *Dependence on foreign platforms and technologies remains a major challenge.* Platforms such as Google, Meta, TikTok, and Shopee dominate Vietnam’s digital advertising and e-commerce markets, while domestic players like Tiki, Sendo, and ZaloPay struggle to compete. In Q1/2025, Shopee and TikTok Shop together accounted for 97% of the online retail market (VnExpress International, 2025). As a result, the domestic digital market is heavily controlled by foreign giants, leading to tax revenue losses, loss of customer data for local firms, and reduced strategic autonomy.

- *Reliance on FDI inflows undermines technological self-reliance.* While foreign-invested enterprises (FIEs) contribute significantly to exports and employment, Vietnamese firms largely remain at the lower end of the value chain, focusing on assembly and outsourcing with limited value added. This dependency exposes the economy to global shocks and strategic shifts by multinational corporations.

- *Technological gap with regional peers.* Compared to Singapore, Malaysia, and Thailand, Vietnam lags behind in the research and application of foundational technologies such as artificial intelligence, IoT, and semiconductors. This gap constrains Vietnam’s competitiveness in attracting high-quality investment and limits its ability to integrate deeply into global value chains.

- *Rising cross-border cybersecurity risks.* Vietnam consistently ranks among the countries most targeted by cyberattacks, with annual damages estimated at billions of USD (Ministry of Information and Communications, 2024). Such incidents not only cause direct economic losses but also threaten national data security, individual privacy, and public trust in the digital environment.

4.3. Impacts of barriers on digital economy development in Vietnam

Barriers to Vietnam’s digital economy exert multi-layered effects, operating both directly on individual stakeholders and indirectly through

reinforcing feedback loops. Weak infrastructure, incomplete institutions, shortages of skilled labor, fragile digital trust, and SMEs' limited access to technology combine to create a cumulative effect: governments face difficulties in data-driven policymaking, businesses lack incentives to invest, society becomes more polarized, and citizens have fewer opportunities to access digital services. This dynamic risks producing “digital poverty” and “technological dependence,” undermining both short-term efficiency and long-term strategic development.

4.3.1. *Impacts on the public sector*

The public sector is affected most clearly in terms of governance capacity and legitimacy. Fragmented and non-interoperable data systems prevent ministries and localities from adopting data-driven governance. Instead of simplifying procedures, many agencies merely “digitize old processes,” resulting in “e-bureaucracy on a computer,” which reduces the efficiency of online public service delivery. At the same time, legal gaps in data governance, e-commerce, and digital taxation lead to revenue losses and diminish the state's ability to regulate markets fairly.

In terms of security, cross-border cyberattacks not only cause financial damage but also threaten national data sovereignty. Once population or foundational databases are leaked, public trust in government declines. This reduces the use of online public services, causing e-government projects to fall short of targets and risk becoming fiscal burdens.

4.3.2. *Impacts on enterprises*

For enterprises, especially SMEs, barriers operate through a “high-cost–low-benefit” mechanism. Weak digital logistics increase transportation costs, lengthen delivery times, and raise return rates, eroding profit margins. Lacking resources for digital transformation, SMEs often rely on foreign e-commerce platforms, becoming dependent on their policies and algorithms. Many firms thus act as “store tenants” rather than building their own brands and customer data.

In addition, unclear regulatory compliance costs and cybersecurity risks discourage small firms, while large firms capitalize on economies of scale. The result is a stratified market where the gap between leading companies and the rest

widens. In the long run, domestic innovation capacity erodes, and the emergence of internationally competitive “flagship” technology firms becomes unlikely.

4.3.3. *Impacts on society*

At the societal level, impacts manifest in widening digital inequality and eroding digital trust. When digital infrastructure and skills are uneven, rural residents, low-income groups, and vulnerable populations risk exclusion from online healthcare, education, and employment opportunities. Such exclusion not only deepens social inequality but also undermines inclusive growth.

Digital trust, a fundamental enabler, remains fragile. Rising online fraud, misinformation, and personal data breaches foster public skepticism, driving people back to cash and traditional transactions. As trust declines, the digital market contracts, firms lose incentives to invest, and service quality deteriorates—creating a negative feedback loop. This is particularly dangerous because once social trust erodes, restoring it is far more costly and time-consuming than investing in technology alone.

4.3.4. *Impacts on citizens*

Citizens are the most immediate recipients of the consequences of digital economy barriers. Households lacking high-speed internet or digital skills are excluded from opportunities to access online public services, participate in e-commerce, or use digital payments. Elderly populations and low-educated workers often feel “left behind” in the digital world, fostering a sense of alienation from technology.

Beyond direct economic losses, citizens bear intangible risks such as concerns over privacy and data security. With rising incidents of personal data leaks, compromised bank accounts, and online scams, a sense of insecurity undermines the formation of a healthy digital culture. Consequently, the transition in consumer habits—from cash to electronic payments—slows down, reducing the spillover effects of the digital economy in daily life.

4.3.5. *Impacts on the overall economy*

Barriers in infrastructure, institutions, human resources, and digital trust weaken both the speed and quality of digital transformation. As a result, labor productivity and resource efficiency fail to

improve as expected, constraining potential GDP growth. The widening gap between large enterprises and SMEs, as well as between urban and rural areas, exacerbates digital inequality. Delays in adopting digital technologies also cause the economy to miss opportunities to leverage economies of scale, reducing its capacity for breakthroughs and prolonging a “dual-layer” development structure in society.

4.3.6. Impacts on international integration

Endogenous barriers limit Vietnam’s ability to seize opportunities from global digital trade and platform economies. Dependence on foreign technologies and platforms leads to data leakage, loss of commercial benefits, and erosion of digital sovereignty. The technological gap with regional peers constrains Vietnam’s participation in global digital value chains, while the lack of alignment between domestic legal frameworks and international standards hinders firms’ access to foreign markets. In the long run, unless addressed, Vietnam risks remaining a “technology consumer” rather than a “value creator” in the international digital economy.

Overall, these barriers form a systemic chain of impacts: weak infrastructure results in limited inclusiveness, inadequate legal frameworks cause fiscal losses and market inequities, talent shortages foster technological dependence, and fragile trust suppresses the adoption of digital services. This chain undermines economy-wide productivity, deprives the nation of a potential “developmental leap,” and risks locking Vietnam into a fragmented digitalization trajectory. At the macro level, failure to remove these barriers could result in a “two-tier” digital economy, where a small number of large enterprises and urban areas reap the benefits, while the majority of SMEs and rural citizens are left behind. This not only slows GDP growth but also generates complex social consequences: rising inequality, declining trust, heightened data security risks, and deeper dependence on foreign technologies. Conversely, if these barriers are addressed in a comprehensive manner, the spillover benefits of the digital economy could outweigh investment costs, creating a positive feedback loop toward sustainable development.

5. Discussion

Given the barriers identified, the most critical

task is to design and implement strategic solutions that not only remove existing obstacles but also unlock new opportunities for Vietnam’s digital economy. These solutions must be feasible within the national context while ensuring sustainability and inclusiveness.

5.1. Solutions addressing specific barriers

- *Infrastructure*: Expand high-speed broadband networks, especially in rural, mountainous, and island areas, and invest in data centers, cloud computing, and smart logistics to support e-commerce and digital services.

- *Institutions*: Develop a coherent legal framework for emerging fields such as AI, big data, fintech, and block chain; harmonize existing regulations; and establish effective cross-sector coordination.

- *Human resources*: Implement a national strategy for digital skills training and retraining, covering schools, universities, vocational education, and lifelong learning, while strengthening linkages between academia and business.

- *Digital culture*: Enhance public awareness, foster trust in online transactions, ensure personal data protection, and combat online fraud to build a safe and healthy digital environment.

- *SMEs*: Provide comprehensive support, including preferential credit, technological consultancy, workforce training, and tailored digital solutions, enabling SMEs to overcome resource constraints and engage in digital transformation.

- *External barriers*: Promote competitive domestic platforms, encourage inter-firm linkages to create a national digital ecosystem, attract high-quality FDI with technology transfer, and strengthen cybersecurity to safeguard digital sovereignty.

5.2. Solutions by stakeholder

- *Government*: Play a central role in institutional design, infrastructure investment, and cybersecurity. Prioritize national databases, smart logistics, telecommunications, and a long-term digital workforce strategy.

- *Enterprises*: Innovate business models, integrate digital technologies into management, production, and distribution, and invest in R&D to enhance competitiveness and global value chain participation.

- *Society*: Professional associations and civil organizations should promote digital literacy, support vulnerable groups, and foster an inclusive digital culture.

- *Citizens*: Actively adopt digital transactions and e-payments, utilize online public services, and improve basic digital skills to ensure personal data protection and contribute to a sustainable digital environment.

5.3. Solutions for the overall economy

The digital economy must be recognized as a pillar of the national growth strategy. Close coordination among ministries, sectors, and local authorities is essential for both policy design and implementation. The government should establish a system of digital economy indicators to monitor progress, assess effectiveness, and adjust policies promptly. At the same time, it is vital to foster an innovation ecosystem, encourage investment in research and development, support tech start-ups, and promote high-impact sectors such as smart manufacturing, digital agriculture, digital logistics, and cross-border digital services.

5.4. Solutions for international integration

In the integration process, Vietnam should actively participate in shaping digital trade agreements and align domestic legislation with international standards on cross-border data flows, privacy protection, and digital taxation. Enhancing negotiation capacity and institutionalizing international commitments are crucial to safeguarding national interests. On the enterprise side, policies should support deeper participation in global digital value chains through joint research, technology development, and expansion of digital service exports. A proactive digital integration strategy will enable Vietnam to shift from being a consumer of technology to a creator of value in the

international digital economy.

6. Conclusion

The digital economy is a strategic pillar of Vietnam's industrialization and modernization, serving as a key driver for achieving the national goal of becoming a developed country by the mid-21st century. However, this process faces multiple internal and external barriers, ranging from infrastructure gaps, incomplete legal frameworks, and human resource shortages to weak digital culture, integration challenges, and technological dependence. These constraints exert multidimensional impacts on the public sector, businesses, society, and individuals, while shaping the overall economy and Vietnam's position in global integration.

Addressing these challenges requires a comprehensive system of solutions that both directly tackles specific barriers and strengthens coordination among stakeholders in the digital ecosystem. Only through joint efforts of the state, businesses, society, and citizens can digital transformation advance holistically and sustainably. In the policy horizon to 2030, priority should be given to institutional improvement, inclusive digital infrastructure, human resource development, and cybersecurity. In the longer term, the vision toward 2045 must focus on building endogenous innovation capacity, fostering leading digital enterprises, and positioning Vietnam as a value creator in the global digital economy.

This study has certain limitations, as it primarily relies on secondary data and focuses on Vietnam's context. Future research should expand to enterprise- and household-level surveys, conduct cross-country comparisons, and incorporate more quantitative evidence to provide stronger foundations for policymaking.

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PHÁT TRIỂN KINH TẾ SỐ Ở VIỆT NAM: THỰC TRẠNG RÀO CẢN VÀ ĐỊNH HƯỚNG GIẢI PHÁP

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Ngày nhận bài: 02/3/2026; Ngày phản biện: 13/3/2026; Ngày tác giả sửa: 17/3/2026;

Ngày duyệt đăng: 26/3/2026

DOI: <https://doi.org/10.58902/tcnckhpt.v5i1.355>

Tóm tắt: Kinh tế số đang nổi lên như một động lực then chốt của thúc đẩy tăng trưởng và nâng cao năng lực cạnh tranh quốc gia. Tại Việt Nam, lĩnh vực kinh tế số hiện đang phát triển nhanh chóng, với tỷ trọng đóng góp đạt 18,3% GDP năm 2024 và tăng lên 18,72% trong nửa đầu năm 2025, tập trung ở các lĩnh vực nổi bật như thương mại điện tử, thanh toán số và chính phủ điện tử. Tuy nhiên, quá trình phát triển kinh tế số tại Việt Nam vẫn đang đối mặt với nhiều rào cản. Ở góc độ nội tại, những thách thức lớn bao gồm: hạ tầng số chưa đồng bộ, khung khổ pháp lý còn chưa hoàn thiện, thiếu hụt nguồn nhân lực chất lượng cao, thói quen tiêu dùng truyền thống và hạn chế trong năng lực chuyển đổi số của doanh nghiệp nhỏ và vừa. Ở góc độ bên ngoài, nền kinh tế số Việt Nam chịu sự phụ thuộc lớn vào các nền tảng công nghệ quốc tế, dòng vốn FDI, đồng thời phải đối diện với khoảng cách công nghệ trong khu vực và nguy cơ mất an toàn, an ninh mạng xuyên biên giới. Bài viết phân tích thực trạng phát triển kinh tế số, đánh giá tác động của các rào cản phát triển kinh tế số đối với khu vực công, doanh nghiệp, xã hội và người dân; từ đó đề xuất các định hướng và giải pháp nhằm thực hiện thành công mục tiêu đưa kinh tế số chiếm 30% GDP vào năm 2030 theo tinh thần Nghị quyết số 57-NQ/TW của Bộ Chính trị khoá XIII.

Từ khóa: Chuyển đổi số; Kinh tế số; Rào cản; Tác động của rào cản; Việt Nam.