

Spectrum Licensing Best Practice Vietnam

Spectrum pricing and policy reform to boost Vietnam's digital growth



Key lessons

- **The Vietnamese government has prioritised 5G as a key driver of digital transformation, setting ambitious targets for nationwide coverage and high-speed connectivity by 2030.**
- **Recent spectrum auctions and policy reforms, including lower reserve prices for core mobile bands and operator incentives, have significantly increased available spectrum and accelerated 5G rollout by major mobile operators.**
- **Vietnam's long-term spectrum roadmap includes plans to allocate additional 3.5 GHz and 6 GHz bands to further support 5G expansion and lay the groundwork for future 6G development.**

Background

The Vietnamese government has identified 5G as part of its wider national agenda to harness digital technology for economic development. It has set ambitious targets to boost digital transformation through ICT and mobile-enabled innovation. These include 100% smartphone penetration for the adult population, average download speeds of 40 Mbps for 4G and 100 Mbps for 5G by 2025, and 99% 5G coverage in Vietnam by 2030.

Vietnam has made remarkable strides on spectrum policy over the last two years to support its national objectives with the assignments of 2.6 GHz and 3.5 GHz spectrum in 2024, followed by 700 MHz in 2025, which have provided the foundations for large-scale deployment of 5G.

Prior to this, only three bands – 900 MHz, 1800 MHz and 2100 MHz – had been licensed to mobile network operators, among the lowest supply in the Asia Pacific region. The successful auctions have doubled the total spectrum supply for mobile to 680 MHz. Each of the three major mobile operators (Viettel, VNPT and Mobifone) acquired 100 MHz of mid-band spectrum, while Viettel and VNPT also acquired 2x10 MHz of 700 MHz low-band spectrum.

Spectrum pricing and policy for investment

The importance of spectrum pricing for sustainable investment was evident in the planning processes and decisions in the recent auctions. Following an unsuccessful attempt to auction 2.3 GHz in 2023 due to high reserve prices, the Authority of Radio Frequency Management (ARFM) undertook a comprehensive benchmarking exercise and adopted a conservative approach by setting prices for 2.6 GHz and 3.5 GHz at low but non-trivial levels to avoid the risk of unsold spectrum. The reserve prices per MHz for the 2.6 GHz and 3.5 GHz were up to 90% lower compared to the unsuccessful 2.3 GHz auction. Specifically, the ARFM emphasised the need for affordable spectrum prices

to encourage network investment and improve service quality.

To encourage operators to speed up 5G rollout, the government introduced an incentive scheme to cover up to 15% of the costs of mobile base station equipment if operators can achieve a target of 20,000 base stations by end-2025. The incentive amount was capped at the total revenue from the auctions. This move demonstrated the positive role of government in supporting industry by redirecting auction proceeds towards connectivity goals and supporting industry investment.

Market impacts and long-term planning

All three operators have rapidly deployed 5G, with Viettel leading the way, having deployed about 30,000 5G base stations within one year and achieving 90% outdoor coverage and 70% indoor coverage as of December 2025. VNPT and Mobifone are also ramping up 5G rollout, focusing on urban locations, key industrial zones and enterprise use cases.

Meanwhile, the ARFM has identified additional spectrum in 3.5 GHz and the full upper 6 GHz (6.425-7.125 GHz) bands as part of Vietnam's long-term spectrum roadmap for mobile to support 5G expansion and set the path towards 6G.



National policy objective to prioritise 5G for economic development



Conservative auction reserve prices and financial incentives for 5G rollout



Long-term spectrum roadmap for future expansion towards 6G

Further information and reference:

- Interview with Dr Le Van Tuan, DG ARFM <https://www.linkedin.com/pulse/spectrum-signals-october-2025-gsma-spectrum-i711f>
- Balanced pricing for Vietnam's 5G future https://www.gsma.com/connectivity-for-good/spectrum/wp-content/uploads/2025/10/Spectrum_Pricing_Vietnam.pdf
- Accelerating 5G in Vietnam: a spectrum roadmap for success https://www.gsma.com/connectivity-for-good/spectrum/wp-content/uploads/2024/11/GSMA_Accelerating-5G-in-Vietnam-2024.pdf
- Vietnamnet Global. Vietnam among world's fastest 5G rollouts with 90% coverage in one year <https://vietnamnet.vn/en/vietnam-among-world-s-fastest-5g-rollouts-with-90-coverage-in-one-year-2478376.html>
- OpenGov. Vietnam: Commercialising 5G to Power Inclusive Digital Growth <https://opengovasia.com/vietnam-commercialising-5g-to-power-inclusive-digital-growth/>

