

EDTECH FOR MARGINALISED LEARNERS IN SOUTHEAST ASIA

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Research methodology

This Landscape Analysis adopted a **mixed-methods approach**, combining a **desk review** with **semi-structured key informant interviews (KIIs)**.

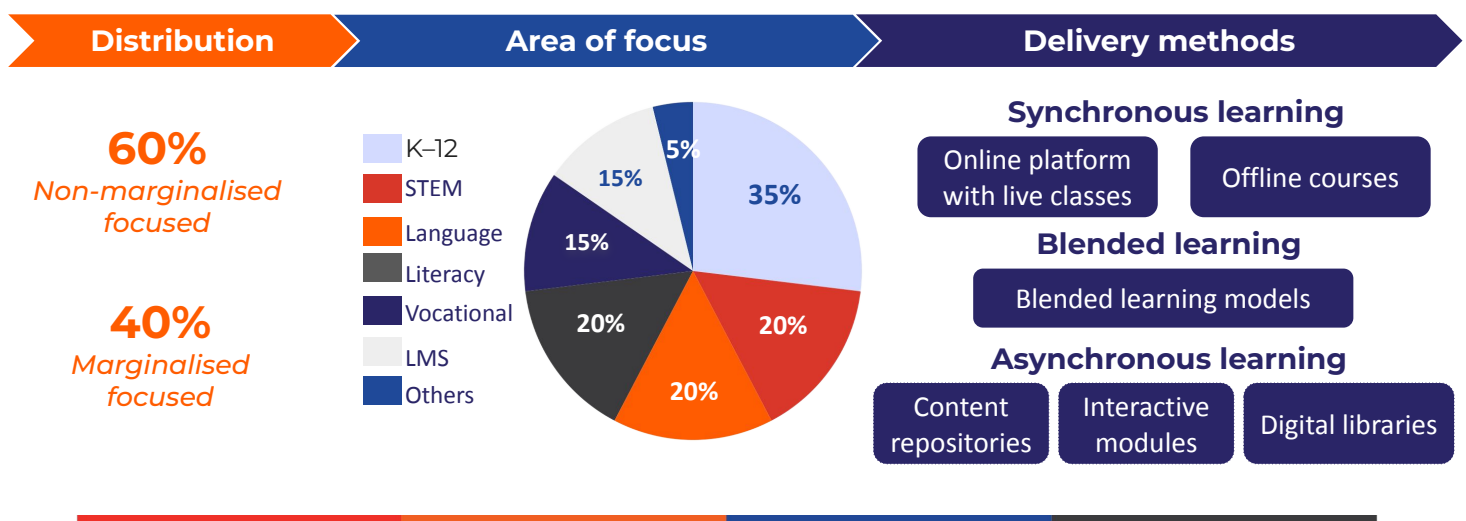


The research questions

1. To what extent are existing EdTech solutions within the Southeast Asian region catering to the needs of marginalised learners?
2. To what extent do EdTech providers consider the needs of marginalised learners in their decision-making and design processes?
3. What are challenges and opportunities towards reaching and scaling interventions for marginalised learners in Southeast Asia?
4. What key considerations and metrics do funders use to evaluate the potential and success of their investments in supporting EdTech interventions?

Providers profile

Diverse EdTech providers in Southeast Asia target K–12 learners with foundational literacy and numeracy.



Ensuring inclusivity for marginalised learners through data-driven design and development

Inclusive EdTech design strategies adopted by EdTech providers across Southeast Asia:

Learning delivery & pedagogical approach	Curriculum alignment & localisation	Collaborative design process	Accessible design considerations
Providers who focus on marginalised learners prioritise offline-first delivery and blended learning to address connectivity barriers in underserved areas.	Providers emphasise localised content in mother tongues for enhanced engagement and national curricula alignment for underserved communities reliant on public education.	Providers partner locally for marginalised perspectives and access insights, conduct multiphase testing despite limits, and prioritise outcome metrics over usage for impact.	Initiatives integrate accessibility features and low-cost hardware to foster inclusive, sustainable EdTech in underserved areas.

Multiphase testing methodology

Through multiphase testing, providers in Southeast Asia prioritise evidence-based metrics for diverse relevance and genuine learning.

1. **Early-stage user testing:** Identifies pain points and validates initial design.
2. **Beta testing:** Detects bugs and usability issues on a near-final product.
3. **Pilot phase:** Validates effectiveness and scalability in real-world settings.
4. **A/B testing:** Optimises user experience through data-driven comparisons.
5. **Focus group / user interviews:** Gathers in-depth qualitative feedback from specific user segments.

Scaling considerations

Providers	Funders
<p>EdTech providers in this study described significant barriers to scaling. These included constraints in funding, internal capacity, and infrastructure.</p> <p>To overcome these challenges, EdTech providers could leverage partnerships with a range of actors, including governments, non-governmental organisations, private sector and communities.</p> <p>They also identified technology as an enabler to scaling, due to its ability to be relatively easy and inexpensive to adapt to new contexts and saw Artificial Intelligence as a potential tool to broaden accessibility, particularly for learners from linguistic minorities.</p>	<p>EdTech funders faced barriers when identifying and investing in scalable innovations, including government regulations, risk-averse funding environments, and the education sector’s low visibility.</p> <p>Funders increasingly prioritise evidence generation to validate EdTech interventions before scaling, warning that premature scaling risks ineffective practices.</p> <p>Insufficient evidence exacerbates challenges in securing capital for EdTech, especially for solutions targeting underserved learners with long-term, hard-to-measure returns.</p>

Looking ahead: Priorities for EdTech providers

Focus on improving learning quality	Focus on learning outcomes, especially for marginalised and foundational-level learners.
Adopt safe and context-appropriate design	Support EdTech that is locally appropriate, and builds critical skills. Address issues like digital safety, inclusivity, and responsible data use.
Learn from global good practices	Identify and adapt successful interventions that have improved learning quality for marginalised groups.
Build cross-sector and regional collaboration	Engage with local communities, strengthen collaboration across sectors, and include underrepresented countries (e.g., Thailand, Myanmar, and Laos).
Generate robust evidence	Generate impact data to guide funders and providers in scaling effective solutions.

Read the complete Landscape Analysis to understand the opportunities and challenges in greater depth

This report presents the findings of a landscape analysis of EdTech interventions designed for the Southeast Asian context. The analysis aims to understand the extent to which EdTech providers and funders in Southeast Asia address the needs of marginalised learners through their priorities in design, investment, and scaling decisions. It focuses on initiatives targeting marginalised groups and those with potential to scale. The research for the study included interviews with funders engaged in the Southeast Asian EdTech space to examine their perspective on EdTech's impact on marginalised learners, the approaches they adopt to support inclusive solutions, and the drivers behind their investment decisions.

To read the full report, go to:

[/docs.edtechhub.org/lib/SB7G3I83](https://docs.edtechhub.org/lib/SB7G3I83)



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