

EDTECH FOR MARGINALISED LEARNERS IN SOUTHEAST ASIA

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Perspectives on scaling

Providers and funders emphasised the importance of scale, although they defined and approached it in different ways.

Providers

Growth was important to providers; nearly all 20 providers described their efforts to scale vertically (reach more learners in a demographic) or horizontally (offer new services or move into a new demographic).

Funders

Although the potential to scale is often a significant factor in funding decisions, funders viewed scaling as more than just increasing reach. It was also important that providers maintain quality, ensure relevance across contexts, sustain engagement, and adapt models for underserved regions.



Scaling considerations

Both providers and funders described significant challenges coming from external and internal factors when trying to expand EdTech products or services.

Government capacity and regulations	Visibility of education as an area of investment in SEA	Market demand
<p>Providers identified governments' lack of capacity to maintain digital solutions, bureaucratic processes and slow information flow as barriers to scale.</p> <p>Funders also recognised these conditions could make it difficult for EdTech providers to scale solutions, even when demand exists.</p>	<p>Some providers saw Southeast Asia as an overlooked region for development investment, and less global attention on the diversity and challenges in the region.</p> <p>Funders noted that the global funding landscape is dominated by more visible crises, making it difficult to attract investment for education programmes, especially for marginalised communities.</p>	<p>Providers are responsive to user demand, which can support marginalised learners when they ask for specific features or content. However, this market-driven approach can favour profit-generating features over those with greater impact.</p> <p>Funders highlighted the focus on the private market due to difficulties working with public school systems. High price sensitivity constrains scalability of direct-to-consumer models.</p>

Funding and budget constraints	Internal capacity to generate evidence	Infrastructure and local context
<p>The 'tech winter', a slowing of investment post-Covid-19, has limited opportunities for EdTech companies to sustain and scale. Some providers leverage short-term corporate social responsibility (CSR) programs, but these lack the long-term sustainability.</p> <p>Providers also described budgetary constraints that led to trade-offs between scaling and maintaining quality or accessibility.</p>	<p>Funders increasingly prioritise evidence generation to validate EdTech interventions before scaling, warning that premature scaling risks ineffective practices.</p> <p>There was limited evidence that EdTech providers had in-house expertise or resources to assess the impact of their solutions, and EdTech providers struggled to find partners who were willing to fund impact studies.</p>	<p>Internet availability and quality constrained scaling efforts, leading some providers to focus on areas with established infrastructure.</p> <p>Providers believed their solution could be useful in neighbouring countries, but recognised that the local context required thoughtful consideration before expanding.</p>

Enablers to scale

Providers identified two key enablers that supported their scaling efforts.

1. Partnerships

To address scaling challenges, providers interviewed for this study highlighted the role of partnerships with governments, corporations, non-profit organisations, and communities for providing support.



Expanding access
Enabling user trust
& adoption



Funding workshops
& programmes
targeting specific
groups



Collaborations to
expand reach.
Access to
connectivity &
digital devices



Driving organic
growth & uptake.
Co-designing
localised content

2. Technology

Although infrastructure was a common constraint, providers emphasised that technology enabled expansion. For instance, AI could positively impact marginalised learners by translating content across multiple languages, thereby broadening accessibility and reach.

Key Insights

Growth versus impact

Providers' discussions on scale centred on growth through increasing reach or services, rather than impact, in part due to limited capacity to conduct robust evaluations.

Partnership trade-offs

Although partnerships provided clear benefits like funding and expansion, they also came with barriers, and take time to cultivate.

Context considerations

Providers and funders saw the potential for broader social impact with regional expansion, but emphasised that cultural relevance and understanding of the local context were essential factors in scaling successfully.

We interviewed 20 providers and 6 funders across 8 countries in Southeast Asia (SEA) to explore the extent to which EdTech stakeholders in the region consider and respond to the needs of marginalised learners through their design, investment, and scaling decisions. This brief covers our findings about scale from the perspectives of both EdTech providers and funders. These perspectives offer insights on the various considerations and factors shaping efforts to expand reach, including funding, partnerships, and evidence generation.

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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