

What these briefs offer

This series of briefs provides key insights from EdTech Hub's landscape analysis of EdTech interventions in Southeast Asia, highlighting how providers and funders address the needs of marginalised learners, the barriers they face, and opportunities to scale inclusive, evidence-based solutions.

Who these briefs are for

These briefs are written for Education stakeholders interested in the EdTech space, including education policymakers, EdTech providers, EdTech Funders, development partners, and practitioners interested in the Southeast Asian education landscape in particular.

How to get the most from this series

These briefs can act as a guide for EdTech providers in Southeast Asia to think about ways to design interventions to effectively and contextually cater to the needs of marginalised learners, through user-feedback and testing mechanisms, scaling considerations, and perspectives on funders when thinking about strengthening effectiveness and measuring impact.

Recommended citation

Gunawan, C. J., Jayasinghe, N., Chrisani, A., & Honda, D. (2025). *Summary Briefs: Unpacking considerations for design, scaling and funding EdTech interventions for marginalised learners in Southeast Asia*. <https://doi.org/10.53832/edtechhub.1143>. Available at <https://docs.edtechhub.org/lib/7V6Z9SAA>.

Related Work

- EdTech for Marginalised Learners in Southeast Asia: Perspectives from funders and providers on priorities, design, investment, and scaling considerations: <https://docs.edtechhub.org/lib/SB7G3I83>
- Bridging Policy and Practice: Building Equitable EdTech Ecosystems in Southeast Asia <https://youtu.be/ljiFbCMO-rw?si=gPc7fje0gw4dGoxs>

Brief 1: EdTech for Marginalised Learners in Southeast Asia – Insights from the Landscape

This brief shares key insights from EdTech Hub's landscape analysis of EdTech interventions in Southeast Asia, highlighting how providers and funders address the needs of marginalised learners, the barriers they face, and opportunities to scale inclusive, evidence-based solutions.

Continue to the next page to see the brief.



EDTECH FOR MARGINALISED LEARNERS IN SOUTHEAST ASIA

This publication has been produced by [EdTech Hub](#) as part of the ASEAN-UK Supporting the Advancement of Girls' Education (ASEAN-UK SAGE) programme. ASEAN-UK SAGE is an ASEAN cooperation programme funded by UK International Development from the UK Government. The programme is in partnership with the Southeast Asian Ministers of Education Office, the British Council, the Australian Council for Educational Research, and EdTech Hub. This material has been funded by UK International Development from the UK Government; however, the views expressed do not necessarily reflect the UK Government's official policies.

Research methodology

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

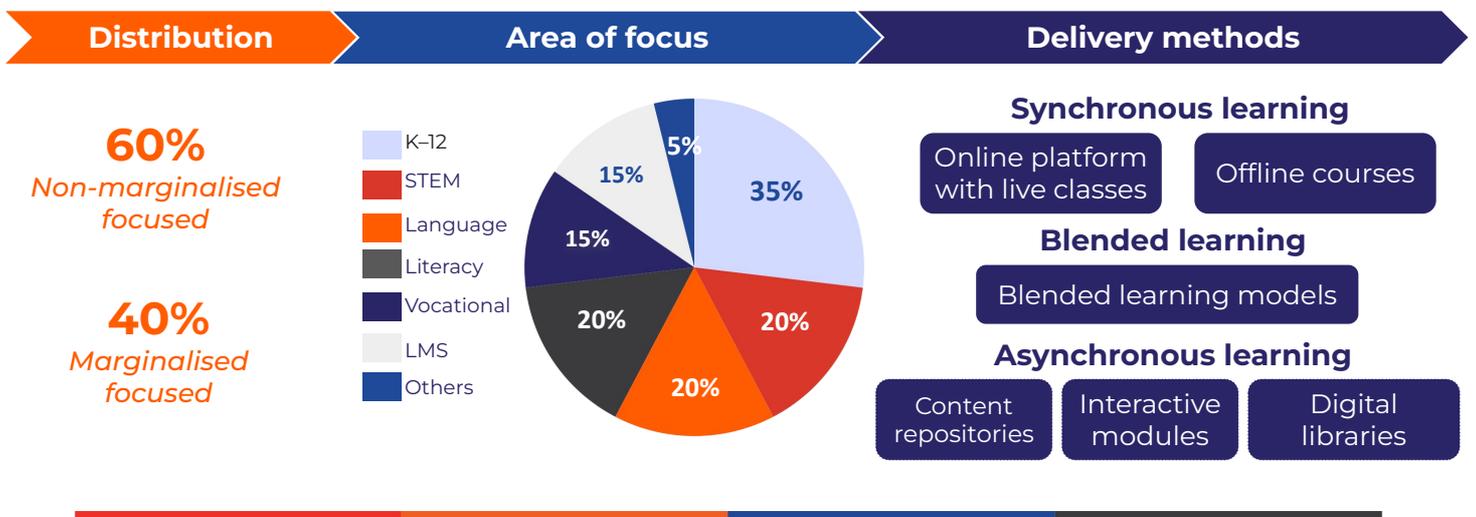


The research questions

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 regarding the reach and scale of 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, the 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)





Brief 2: Designing Inclusive EdTech for Marginalised Learners

This brief examines how EdTech providers in Southeast Asia use data-driven, user-centred design and multiphase testing to ensure inclusivity for marginalised learners. It highlights how multi-stage feedback, localisation, and accessibility-focused adaptations help address diverse learner needs and regional challenges, promoting more equitable and effective digital education.

Continue to the next page to see the brief.



EDTECH FOR MARGINALISED LEARNERS IN SOUTHEAST ASIA

This publication has been produced by [EdTech Hub](#) as part of the ASEAN-UK Supporting the Advancement of Girls' Education (ASEAN-UK SAGE) programme. ASEAN-UK SAGE is an ASEAN cooperation programme funded by UK International Development from the UK Government. The programme is in partnership with the Southeast Asian Ministers of Education Office, the British Council, the Australian Council for Educational Research, and EdTech Hub. This material has been funded by UK International Development from the UK Government; however, the views expressed do not necessarily reflect the UK Government's official policies.

Research methodology

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

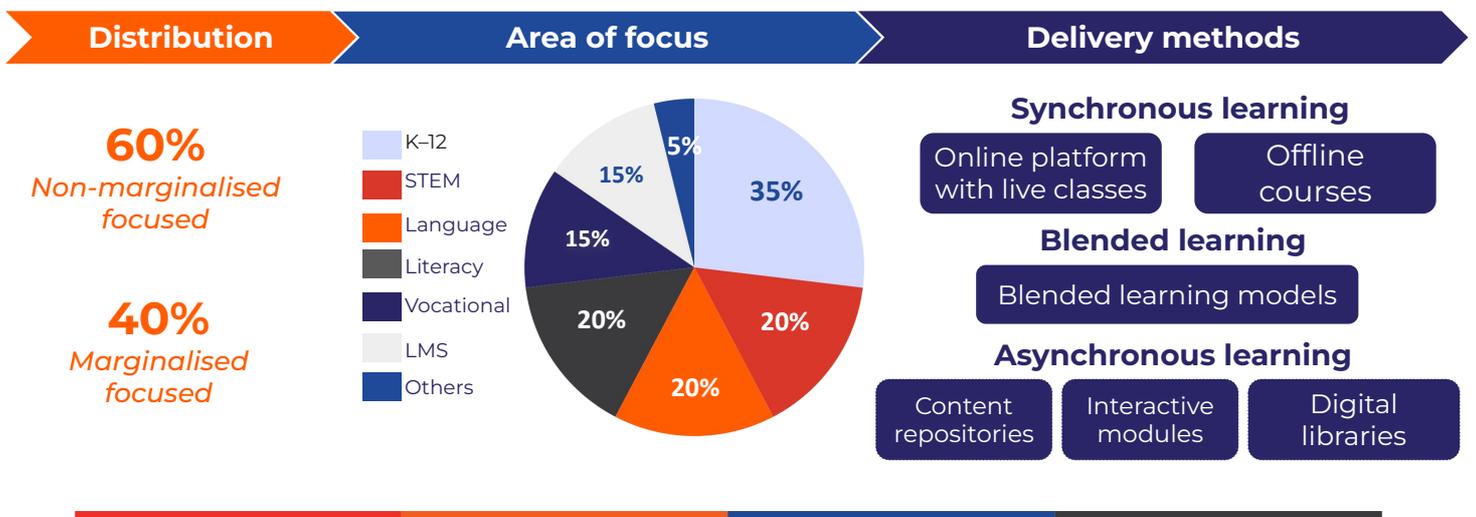


The research questions

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 the challenges and opportunities regarding the reach and scale of 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

Southeast Asian EdTech providers incorporate user-centric testing and tailored features in design, regardless of beneficiaries. Multi-stage feedback, localisation, and making adaptations with accessibility in mind address diverse needs and regional challenges and thereby promote inclusive education.

Contextualisation and localisation

Localisation



Providers emphasise localised content that incorporates local languages, dialects, and cultural contexts for enhanced engagement.

Curriculum alignment



Providers align content with national curricula to ensure educational standards and relevance, especially for underserved communities reliant on public education.

Inclusive practices

Human-centred design (HCD)

Focuses on simplified user interfaces, text-based navigation, larger fonts, and single sign-on for users with limited technical skills.

Lightweight applications

Minimise processing demands for compatibility with low-cost devices in low-connectivity areas.

Accessibility features

These are SEND focused, and include adjustable text sizes, brightness controls, closed captions, and audio functions to foster inclusive use of technology.

Multiphase testing methodology

Multi-stage testing validates product relevance across development phases, enabling EdTech providers to iterate based on user insights for enhanced functionality and alignment with needs.

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.



Despite its strengths, this process demands **significant time, expertise, and resources**, which are often limited.

Design challenges

Teacher quality and recruitment: In Indonesia and Vietnam, teachers employed by EdTech providers exhibit suboptimal quality due to rural-urban disparities in compensation, standards, and certification, compounded by limited access to training in remote areas.

Delivery method constraints: Synchronous models demand reliable infrastructure, excluding rural learners, while self-paced options falter on motivation without support; hybrid approaches require skilled facilitation amid device shortages.

Curriculum localisation gaps: K-12 curricula overlook 21st-century skills and cultural relevance. Localisation is hampered by resource shortages, lack of dialect expertise, and sensitive issues such as gender norms.

Feedback and accessibility barriers: Testing marginalised users is impeded by inaccessibility and a lack of networks; offline designs with SEND features (e.g., text-to-speech) are essential but challenging to implement because of low digital literacy and poor connectivity.

Key Insights

Offline-first for accessibility

Given the widespread issue of unreliable internet connectivity in Southeast Asia, offline-first technology is vital for ensuring educational access for marginalised learners.

User-centred principles

Providers adopt HCD for iterative user-focused design and Universal Design for Learning (UDL) for flexible engagement, presentation, and assessment.

Partnerships for reach, relevance, and evaluation

Collaborations with NGOs, communities, and governments facilitate access, co-creation of culturally relevant solutions, and representative feedback.

Read the complete Landscape Analysis

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. To read the full report, go to: [/docs.edtechhub.org/lib/SB7G3I83](https://docs.edtechhub.org/lib/SB7G3I83).



Delivered by



In partnership with





Brief 3: EdTech for Marginalised Learners in Southeast Asia – Scaling Approaches of Providers and Funders

This brief examines how EdTech providers and funders approach scaling in Southeast Asia. It highlights their perspectives on scaling, the key considerations that shape their strategies, and the enablers that support growth, such as partnerships and technologies. The brief also draws out insights on context-specific challenges, the balance between growth and impact, and the role of partnerships in enabling sustainable and inclusive scaling.

Continue to the next page to see the brief.



EDTECH FOR MARGINALISED LEARNERS IN SOUTHEAST ASIA

This publication has been produced by [EdTech Hub](#) as part of the ASEAN-UK Supporting the Advancement of Girls' Education (ASEAN-UK SAGE) programme. ASEAN-UK SAGE is an ASEAN cooperation programme funded by UK International Development from the UK Government. The programme is in partnership with the Southeast Asian Ministers of Education Office, the British Council, the Australian Council for Educational Research, and EdTech Hub. This material has been funded by UK International Development from the UK Government; however, the views expressed do not necessarily reflect the UK Government's official policies.

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)



Delivered by



In partnership with



Brief 4: EdTech for Marginalised Learners in Southeast Asia – Funder Perspectives

This brief explores the perspectives of six diverse funders engaged in EdTech across Southeast Asia. It highlights how funders conceptualise equity and inclusion, balance financial returns with social impact, and navigate the structural opportunities and challenges shaping the EdTech ecosystem. These insights provide a deeper understanding of the role funders play in supporting equitable, evidence-based EdTech solutions.

Continue to the next page to see the brief.



EDTECH FOR MARGINALISED LEARNERS IN SOUTHEAST ASIA

This publication has been produced by [EdTech Hub](#) as part of the ASEAN-UK Supporting the Advancement of Girls' Education (ASEAN-UK SAGE) programme. ASEAN-UK SAGE is an ASEAN cooperation programme funded by UK International Development from the UK Government. The programme is in partnership with the Southeast Asian Ministers of Education Office, the British Council, the Australian Council for Educational Research, and EdTech Hub. This material has been funded by UK International Development from the UK Government; however, the views expressed do not necessarily reflect the UK Government's official policies.

Funders' perspectives

Six diverse funders engaged in EdTech across Southeast Asia were interviewed.

Their perspectives provide insight into how funders conceptualise equity and inclusion, balance financial returns with social impact, and address the structural opportunities and challenges shaping the EdTech ecosystem.

Funders interviewed

- 1 YCAB Ventures
- 2 Octava Foundation
- 3 Kaizenvest
- 4 Nguyen Phuong Foundation
- 5 Wavemaker Partners
- 6 Monk's Hill Ventures

Funder types

- Venture capital
- Philanthropy
- Private equity
- Blended finance
- Venture philanthropy

Four key thematic findings

1
Focus and impact evaluation in EdTech investments

2
Market trends and business models

3
Funders' insights on scaling

4
Challenges faced by funders

1. Focus and impact evaluation



Equity and inclusion

Funders show broad commitments to reducing educational inequity without focusing on a specific marginalised group. Priorities for groups like rural learners, women, or low-income families are typically embedded in wider educational missions, not as targeted strategies.



Balancing impact and returns

Approaches vary by institutional type: philanthropies emphasise mission alignment and social outcomes, while commercial funders prioritise financial sustainability. Yet, all converge on EdTech needing meaningful educational value for viability.



Impact evaluation

Impact measurement uses quantitative and qualitative methods. Key metrics include enrolment, retention, and progression, but learner experiences and case studies are gaining importance. Embedding evaluation in product design is seen as essential.

2. Market trends and business models

Financial viability



Public education engagement challenges limit opportunities; private markets dominate. 'Tech winters' heighten profitability pressures and limits capital.

Evidence production



Investment in rigorous evidence is fragmented. Resource constraints lead to reliance on informal or iterative testing, despite acknowledging that stronger evidence is vital for quality improvement and policy alignment.

Business models



B2B and B2S approaches predominate, while B2G models are limited by regulatory and procurement barriers. Hybrid models blending commercial and mission-driven elements are emerging.

i Regional Trend in Vietnam: Vietnam is frequently identified as a high-potential market, characterised by strong demand for private tuition and supplementary learning. Informal markets are vibrant, but integration into formal schooling remains limited.

3. Funders' insights on scaling

Centrality of scaling

Funders view the ability to scale as a critical determinant of investment.

Multidimensionality

Scaling is increasingly understood as more than expansion of reach; it also involves maintaining quality, ensuring contextual adaptability, and demonstrating evidence-based practice.

Differences by funder type

Commercial investors prioritise market expansion and profitability, while philanthropies emphasise equity and learning outcomes. Premature scaling without validated evidence is widely recognised as risky.

4. Challenges faced by funders

Tech winter: Slowing investment

Approaches vary by institutional type: philanthropies emphasise mission alignment and social outcomes, while commercial funders prioritise financial sustainability. Yet, all converge on EdTech needing meaningful educational value for viability.

Divergent approaches to measuring impact

No shared framework exists across funders, creating inconsistencies in how effectiveness is measured and compared. Tensions remain between reliance on quantitative reach indicators and interest in more qualitative, learner-centred outcomes.

Policy gaps and systemic constraints

Limited financial flexibility, technical expertise gaps, and restrictive regulations in public education systems constrain EdTech adoption and scale.

Investor caution and competing priorities

Investor caution has increased following high-profile failures in the sector. Education also competes with more visible global priorities, such as climate change and health, limiting attention and resources despite its long-term importance.



Funder perspectives: Considerations to strengthen provider effectiveness

Evidence generation

Many providers struggle to measure impact beyond basic metrics — underscoring the need for stronger, more inclusive tools to ensure that no learner is left behind.

Collaborative partnerships

Partnerships with providers and other stakeholders take time, alignment, and trust but increase reach and effectiveness.

Digital access constraints

Expanding access to devices, connectivity, and improving infrastructure can help reach marginalised learners more effectively.

Read the complete Landscape Analysis

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. To read the full report, go to: [/docs.edtechhub.org/lib/SB7G3I83](https://docs.edtechhub.org/lib/SB7G3I83).



ABOUT EDTECH HUB AND ASEAN-UK SAGE

This publication has been produced by [EdTech Hub](#) as part of the ASEAN-UK Supporting the Advancement of Girls' Education (ASEAN-UK SAGE) programme. ASEAN-UK SAGE is an ASEAN cooperation programme funded by UK International Development from the UK Government. The programme is in partnership with the Southeast Asian Ministers of Education Office, the British Council, the Australian Council for Educational Research, and EdTech Hub. This material has been funded by UK International Development from the UK Government; however, the views expressed do not necessarily reflect the UK Government's official policies.

EdTech Hub is a global research partnership. Our goal is to empower people by giving them the evidence they need to make decisions about technology in education. Our evidence library is a repository of our latest research, findings, and wider literature on EdTech. As a global partnership, we seek to make our evidence available and accessible to those who are looking for EdTech solutions worldwide.

RECOMMENDED CITATION

Gunawan, C. J., Jayasinghe, N., Chrisani, A., & Honda, D. (2025). *Summary Briefs: Unpacking considerations for design, scaling and funding EdTech interventions for marginalised learners in Southeast Asia*. EdTech Hub.
<https://doi.org/10.53832/edtechhub.1143>. Available at
<https://docs.edtechhub.org/lib/7V6Z9SAA>.

LICENCE

Creative Commons Attribution 4.0 International
<https://creativecommons.org/licenses/by/4.0/>

You—dear readers—are free to share (copy and redistribute the material in any medium or format) and adapt (remix, transform, and build upon the material) for any purpose, even commercially. You must give appropriate credit, provide a link to the licence, and indicate if changes were made. You may do so in any reasonable manner, but not in any way that suggests the licensor endorses you or your use.

AUTHORS

Clarissa Jazzlyne Gunawan, Neema Jayasinghe, Aprilia Chrisani, and Delanie Honda

DATE

December 2025

