2019 Philippines EdTech Ecosystem Review
SUMMARY FINDINGS AND RECOMMENDATIONS

KEY FACTS AND FIGURES

Study Design:
⇒ Used the Education Technology (EdTech) Ecosystem Scaling Model developed by Omidyar Network (now Imaginable Futures)!1
⇒ Interviewed over 50 key informants from government, civil society and private sector.
⇒ Carried out a survey of 205 District IT Coordinators, and 386 teachers and 405 school IT coordinators.
⇒ Conducted case studies involving teacher interviews and school visits in 2 districts.

Objective:
Studying the EdTech ecosystem is intended to identify opportunities for technology to help the Philippines break away from the status quo in teaching and learning. While identifying existing, promising practices, the ecosystem model helps anticipate and address weaknesses or gaps in the enabling environment that are required to bring those practices to scale with impact. The study aims to contribute to ongoing policy review and curricular reforms intended to improve country-wide achievement in basic education.

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Findings
 Philippine schools benefit from strong and sustained government commitment to technology infrastructure, both general (electrification, internet penetration) and school-specific (computers, school connectivity). Some rural areas still suffer from poor general infrastructure, but government and private-sector partnerships exist targeting these last-mile schools with appropriate packages.

Teachers mostly use technology to digitize existing lessons using standard productivity tools (word processing, slide presentations). There are very few EdTech entrepreneurs creating custom content for the education market. Most educational apps have been created through pilot initiatives, grants, or by teachers themselves, but lack an efficient distribution channel. The recently launched DepEd Commonsii is a promising avenue.

Where technology is being adopted and scaled at school and division levels, it is the result of strong leadership and initiative by visionary thinkers with support from LGUs, school alumni, parents, and local businesses. EdTech policy and strategy are in continual state of evolution, and there are multiple government agencies involved in the sector, often in silos.

Recommendations
As access approaches nationwide scale, and teachers become proficient in use of productivity tools for lesson delivery, a shift toward high-impact, specific uses of technology for content learning is required. For this:

• EdTech needs a strong central vision and strategy, to help align inputs from a range of partners for more impact. It should be communicated widely and endorsed from the highest levels of government.

• invest in champions, especially school leaders who can take a lead role in building teaching capacity, setting expectations, supporting rapid-cycle evaluation of technology benefits, selecting products for use, and more.

• improve marketing and distribution channels for both OER and commercial products to help teachers find existing resources before embarking on new digital lesson design.

• new digital resources should concentrate on subjects that benefit most from attributes of technology and that are most difficult to teach traditionally.

2http://commons.deped.gov.ph
PHILIPPINES EDTECH ECOSYSTEM PROFILE

Ecosystem Profile

■ EdTech Supply
“Partnerships” (1.4) was the strongest component in this category. The private sector is involved in creating content and delivering packages of support. Community partnerships, corporate social responsibility and alumni support DepEd and the spread of access, use, and impact. Partnerships still need a business model that incentivizes EdTech growth, innovation and sustainability. The Philippines is not yet seeing the kind of growth in EdTech supply and demand seen in countries like China and Indonesia. This may be due to the culture of central control of content.

■ Enabling Infrastructure
Many government initiatives are underway to get rural communities connected and to find solutions for last-mile schools. The Philippines is also close to approaching scale of electrification, but still far from reaching scale and affordability for internet connectivity. The DCP has been a major influence in spreading access to EdTech’s potential; now this must be combined with other ecosystem components to make sure that potential is acted upon. More information is needed to understand how families access educational resources.

■ Policy and Strategy
Providing, scaling, and sustaining EdTech has been influenced by a national curriculum and expectations for basic digital literacy. Teachers are encouraged to use ICT across subject areas to make lessons more engaging, but a clear goal for how technology can and should be used in schools to improve subject-specific pedagogy is lacking. A series of ICT in education frameworks have been drafted but never formally adopted. The current ambitions for a “Digital Rise,” are promising, but it is unclear whether there is a strong enough voice behind it to create necessary momentum.

■ Human capacity
Quotations from key informants praised the role of local visionary leaders perhaps more than any other single driving factor. These leaders, particularly school principals or regional directors, are able to influence EdTech investments and models of use. Champions and ambassadors have emerged naturally and deliberately as mentors who build capacity in their peers. A challenge is to ensure that initiatives continue when champions move on.