

Enabling Policy Reforms

Strengthening the Care Economy across Southeast Asia



About Investing in Women

Investing in Women (IW) is an Australian Government initiative to accelerate women's economic equality and promote inclusive economic growth across Southeast Asia. Through partnerships with diverse stakeholders, we support women to thrive in the workplace and succeed in business.

IW uses innovative approaches to catalyse women's economic participation through four workstreams:



Workplace Gender Equality

We support local business coalitions and partners to help leading companies create gender-equal workplaces. By encouraging changes in organisational culture, practice, and policy, we have reached more than one million employees since 2016.



Campaigns and Communities of Practice

We support locally driven digital campaigns and communities of advocates to promote gender-equal attitudes and behaviours and strengthen public support for women's economic participation.



Enabling Policy Reform

We work with trusted local actors to shape policies that support women in the workforce, particularly related to the care economy. Our partners bring solid research, business insights and collaborative action grounded in the local policy context.



Gender Lens Investing

We work with investors and impact networks to increase investment in businesses benefiting women by deploying Gender Lens Investing (GLI) strategies and products. This includes an IW funding window within Australian Development Investments (ADI).

Care Economy

- Care work, whether it is paid or unpaid, is essential to sustains all human activity.
- Unpaid care work alone, if compensated, would be equal to 9% of global GDP or USD11 trillion (WEF, 2024).
- Despite its significance, care work remains under-recognised, under-invested, and gender segregated.
- Developing the care economy is a cornerstone for improving women's economic equality and sustainable economic growth.**
- By redistributing and resourcing care work, women can have greater opportunities to participate in the workforce.

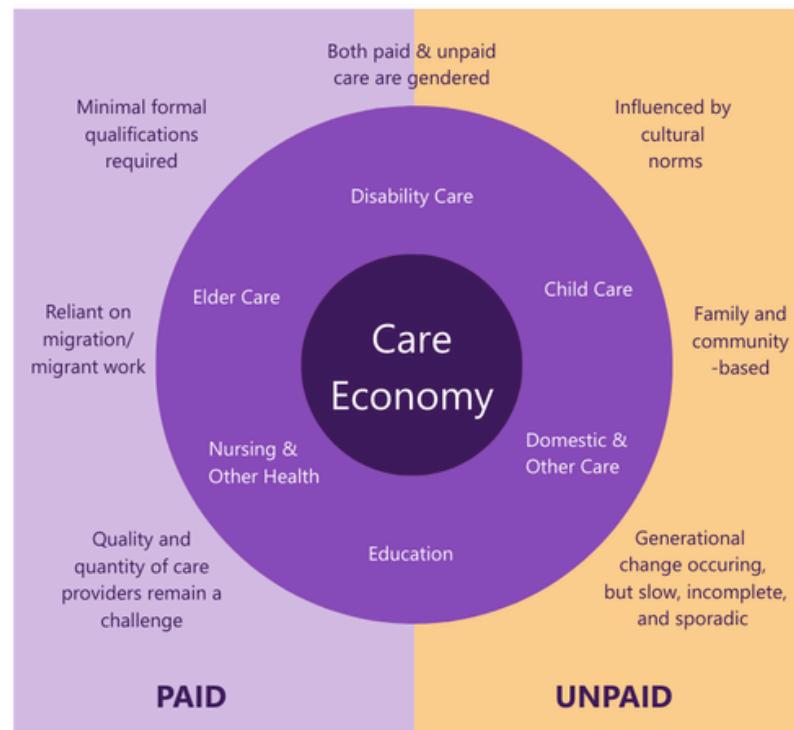


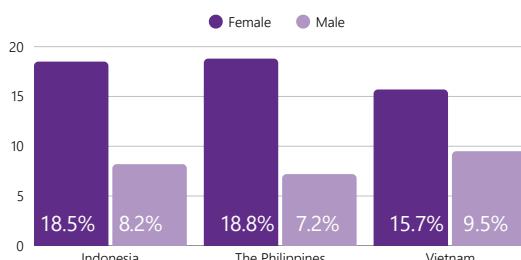
Illustration of the Care Economy (ANU-GIWL, 2023)



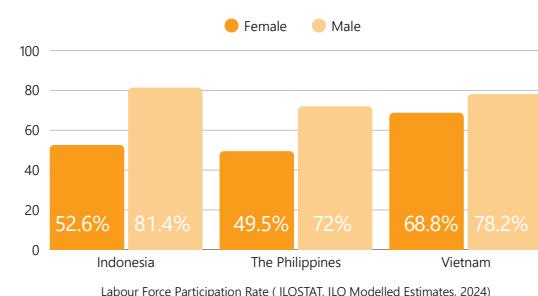
Why Care Economy Matters?



Globally, men spend 1.6 hours/day on unpaid care and domestic work. **Women spend 2.8x more time** than men caring for the elderly (UN Women, 2023).



Gender gaps in the labour force participation remain a key trend that is largely **driven by domestic and care responsibilities** across Indonesia, the Philippines, and Vietnam (GIWL, 2022).



Around **40% of women** in wage employment in Indonesia leave the workforce after marriage and childbirth, nearly half cite family-related reasons (World Bank, 2024).



Many factors contribute to unpaid care work, including the country's demographic shift. In Vietnam, **over 25% of the population** is projected to be aged 60 and above by 2045 (ADB, 2020).

The private sector has a crucial role in the care economy



As employers. Workplaces that offer flexible support for employees with caregiving responsibilities see higher wellbeing and productivity across their teams (Institute for Employment Studies, 2018).



As investors. Care enterprises are thriving. Globally, around 42% of care enterprises became profitable within seven years, and 55.5% have plans to achieve break-even in the next three to five years (AVPN, 2023).



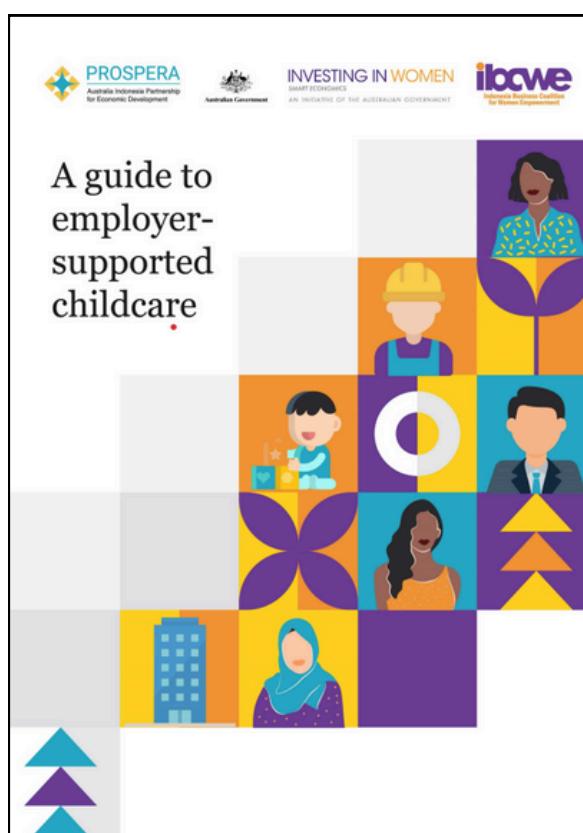
As service providers. With rising incomes in Asia Pacific, demand for child and eldercare is booming. In fact, the region is the largest market for child day care services at 33% (Research and Markets, 2024).

Advancing Women's Economic Empowerment through Employer-supported Childcare

In Indonesia, Investing in Women is partnering with the **Indonesian Business Coalition for Women Empowerment (IBCWE)** to explore how employers can contribute to the care economy by providing childcare support.

Through a pilot with some of their member companies, IBCWE is identifying models of employer-supported childcare tailored to different workforce settings.

These trials aim to uncover private sector insights into the regulatory enablers and barriers that influence the development of employer-supported childcare model, contributing to policy-relevant evidence to support future scale and adoption.



This initiative builds on the collaboration between Investing in Women, Prospera, and IBCWE, which launched **Indonesia's first employer-supported care guide in 2024**.

Scan to access the guide:



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Godrej

"The launch of iPLAY at Godrej is more than the opening of a daycare - it reflects the kind of workplace we're building: one where care and careers grow together, where parents feel supported, and children have a safe, nurturing space to thrive."

—Rajesh Sethuraman, CEO
GCPI Indonesia

WATCH THIS SPACE

In 2026, IBCWE is set to:

- Deliver case studies on employer-supported childcare in Indonesia
- Convene policy dialogues to share private sector insights and support policy stakeholders in care economy

Part-Time Work and Flexible Working Arrangements Studies

In the Philippines, Investing in Women is partnering with the **Department of Economy, Planning, and Development (DEPDev)** to implement two research activities focused on part-time work policies, and the experiences of flexible work, recognising that well-designed part-time roles, with flexibility, fair pay, and pathways to full-time employment, can advance women's participation in the labour force. These studies are well aligned with the 2023-2028 Philippine Development Plan which promotes gender equality within the labour force.



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IW commissioned the **Comparative Study on Gender-Inclusive Part-Time Work Policies** in collaboration with ANU-GIWL, which highlights global best practices and lessons of part-time policies from Indonesia, Vietnam, Australia, and the Netherlands.



[Scan to learn more](#)

From insights to impact

In May 2025, The Government of Philippines launched the first national jobs masterplan, *Trabaho Para Sa Bayan* (TPB) Plan 2025-2034, which recognises flexible work arrangements, including part-time roles, as key to advancing women's labour force participation and supporting unpaid carers, drawing on insights from the Gender-Inclusive Part-Time Work Policies study.



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IW is conducting the **Gender and Demographic Insights on Flexible Working Arrangements** study. This research aims to provide private companies and policymakers with evidence on how flexible work impacts different groups of employers and employees, offering valuable insights on promoting decent work amid shifting norms. The study will be published in early 2026.

IW will also commence the **Juana Trabaho: A Strategic Framework and Action Plan to Increase Women's Labour Force Participation through Quality Jobs**. Aligned with the TPB, this activity will support DEPDev in understanding quality job dimensions using a gender-informed, life-cycle approach – and their intersections with the care economy – to improve women's workforce participation. The consolidated framework and action plan will be released by mid-2026.

Gender-Responsive Innovations for At-Home Aged Care

In Vietnam, Investing in Women is engaging the private sector to build the evidence base for gender-responsive innovations to improve the quality of at-home care for older adults in Vietnam.



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Vietnam Chamber of Commerce and Industry
Ho Chi Minh Regional Branch



IW is partnering with **VCCI-HCMC** to support long-term efforts to professionalise aged care in Vietnam.

In collaboration with Melbourne Polytechnic, Hong Duc Private Hospital, and other partners, the initiative is piloting competency-based micro-credentials for caregivers.

It will also work with industry partners to provide job placements and advocate for the recognition of non-medical caregiving as a valued profession.

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SwipeRx



IW is partnering with **SwipeRx**, a health-tech company, to explore how community pharmacists and digital health providers can support gender-responsive aged care solutions.

SwipeRx will launch an accredited aged care digital training curriculum through its app to over 16,000 community pharmacists. In addition, SwipeRx will also conduct a market scan to identify enablers and barriers to access to health-tech solutions that alleviate families' unpaid caring responsibilities.

These initiatives align with the Government of Vietnam's increasing focus on aged care, including the National Strategy on the Elderly to 2030, with a vision to 2045, approved by the Prime Minister in February 2025

Future Demand for Care Study

Investing in Women is partnering with the Australian National University's Global Institute for Women's Leadership (GIWL) to conduct the **Future Demand for Care** study.

The Future Demand for Care study examines the enabling and inhibiting factors that shape the demand for care across the region and generations. One of the most critical elements of the study is to understand the roles and potential contributions of key players, specifically government and private sector stakeholders.

Using a consortium approach, the research is led in collaboration with local research organisations in each IW country: SMERU Research Institute in Indonesia, the Philippine Institute for Development Studies (PIDS), and the Mekong Development Research Institute (MDRI) in Vietnam.



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Australian
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THE GLOBAL
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The Future Demand for Care Study is planned to be published in October 2025.



The Future Demand of Care builds on our initial landscape study of [The care economy in Vietnam, the Philippines & Indonesia](#).

This study provides a comprehensive overview of the care economy in Vietnam, the Philippines and Indonesia.

[Scan to read the study](#)

