



CARECON 2025

The New Frontiers In the Care Economy Conference

CONFERENCE REPORT

December 2025



Written and designed by The Asia Foundation

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CARECON 2025: The New Frontiers in the Care Economy Conference
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Introduction

Care is a fundamental need across every stage of life, supporting both social wellbeing and economic stability. It includes caring for children, older adults, and persons with disabilities, along with essential household responsibilities. The economic scale is large: unpaid care in Asia and the Pacific has been valued at roughly USD 3.8 trillion. Women often serve as the invisible backbone of the care economy, with studies indicating that they spend two-to-five-times more hours on care work than men. With care-related roles expected to make up around 40 percent of new jobs in Southeast Asia by 2030, investing in the care sector is vital for advancing gender equality, strengthening social protection, creating employment, and building resilient economies.

Southeast Asia faces shared and urgent care challenges that require coordinated action. Deeply rooted gender norms continue to place the bulk of caregiving on women, restricting their participation in the labor market. Governance of the sector is spread across multiple ministries including health, labor, social protection, and economic affairs, making it difficult to build cohesive and well-aligned national systems. Service delivery is further weakened by care worker shortages, limited career pathways, and low wages. Persistent data gaps obscure the full extent and economic value of unpaid care, limiting the effectiveness of policy decisions. At the same time, the digital and green transitions risk deepening existing inequalities unless care and women's economic participation are deliberately integrated into emerging sectors.

The New Frontiers in the Care Economy Conference (CARECON 2025) convened care champions, government officials, practitioners and partners in Kuala Lumpur, Malaysia, to examine these gaps and chart practical ways forward. Organized by Malaysia's Ministry of Women, Family and Community Development with the ASEAN Secretariat, the Australian Government, The Asia Foundation, the UN and regional partners, CARECON 2025 provided a platform to share evidence, showcase promising models, and align regional commitments with national action. The event also marked the official launch of Malaysia's Care Strategic Framework and Action Plan 2026–2030, a whole-of-nation blueprint that places legislation, workforce development, finance, collaboration and technology at the heart of national reform.

Discussions at CARECON 2025 emphasized that an effective care agenda must be gender-responsive, life-cycle oriented, and built on whole-of-government and whole-of-society collaboration. Drawing on plenaries, focus groups, and site visits, the conference identified the next frontiers in the care economy in ASEAN: improving measurement to acknowledge unpaid care, building inclusive digital and data systems for care, strengthening and professionalizing the care workforce, expanding innovative and sustainable partnerships and financing, and integrating care into climate and disaster resilience planning. These themes form the basis for the recommendations and actions set out in this report, reflecting a shared commitment to transform care from an invisible burden into a visible, financed, and valued economic sector.



ASEAN partners and the Ministry of Women, Family and Community Development celebrate the launch of Malaysia's National Care Strategic Framework and Action Plan at CARECON 2025 held on November 4–5, 2025 in Kuala Lumpur.

Acknowledgements

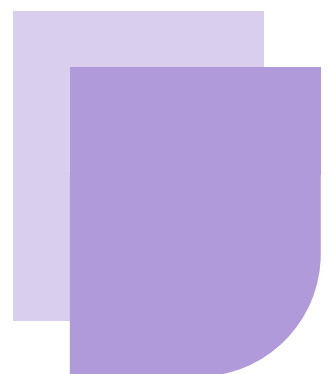
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We acknowledge the critical role of Malaysia's Ministry of Women, Family and Community Development (Kementerian Pembangunan Wanita, Keluarga dan Masyarakat), and the Care Economy Research Institute (CERI) at La Trobe University as key enablers that ensured the successful implementation of this initiative.

We also thank our supporters, the ASEAN Secretariat and the relevant ASEAN Sectoral Bodies, for their collaboration and commitment to advancing the care economy agenda across the region.

We also acknowledge the contributions of the relevant UN agencies and programs, such as UNDP, UNFPA, UNICEF, ESCAP, and UN Women, as well as industry practitioners and think tanks whose engagement and shared expertise significantly enriched the dialogue and strengthened the outcomes of this program.

The views expressed in this report are those of the authors and do not necessarily reflect those of the Australian Government or any partner organizations.



New Frontiers in the Care Economy in ASEAN

The ASEAN policy architecture for the care economy, anchored in the ASEAN Declaration on Strengthening the Care Economy and the ASEAN Comprehensive Framework on the Care Economy, provides a unified regional vision for building inclusive, resilient, and gender-responsive care systems.

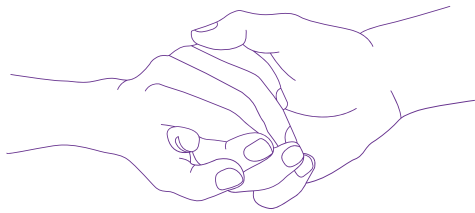
With the world now past the midpoint of the Sustainable Development Goals (SDGs), and SDG 5.4 calling for the recognition and valuing of unpaid care work, this framework is especially timely. It translates high-level commitments into concrete guidance on care infrastructure, social protection, service quality, workforce development, and financing, offering member states a shared foundation for policy alignment, standards development, and cross-border cooperation.

Malaysia's ASEAN Chairmanship in 2025 positions the country as a key regional hub for advancing this agenda. CARECON 2025 was designed to accelerate the implementation of the ASEAN Framework as well as Malaysia's national agenda by convening policymakers, experts, and partners to translate commitments into action. The Asia Foundation, serving as Malaysia's strategic partner, plays a central role in supporting evidence generation, stakeholder coordination, and policy design.

Together, these efforts reinforce ASEAN's collective momentum toward valuing care work, strengthening care systems, and exploring the next frontiers needed to ensure inclusive and sustainable development, such as:

- Improving Measurement to Acknowledge Unpaid Care
- Building Inclusive Digital and Data Systems for Care
- Strengthening and Professionalizing the Care Workforce
- Expanding Innovative and Sustainable Partnerships and Financing for Care
- Integrating Care into Climate and Disaster Resilience Planning

What does the care ecosystem in the ASEAN region look like?



\$3.8 trillion

Unpaid care work in Asia and the Pacific is worth trillions.

Women spend substantially more hours on care than men.



only 30%



Fewer working men in Indonesia, the Philippines, and Vietnam take paternity leave due to persistent gendered caregiving norms.

Emerging professions in ASEAN are expected to be care-related by 2030.

up to 40%



Improving Measurement to Acknowledge Unpaid Care

Unpaid care remains largely invisible because it is not systematically captured in national statistics. In ASEAN, women routinely spend far more time on care than men, yet fragmented data systems, limited time-use surveys, and the absence of national care accounts mean policymakers lack the evidence needed to design targeted investments, social protection measures, and labor-market reforms. Without comprehensive measurement, unpaid care continues to be treated as a private household responsibility rather than productive labor that sustains economies and enables the formal workforce.

Strengthening measurement can shift this narrative by quantifying care work, integrating its value into national accounting, and informing financing decisions. This also helps governments identify gaps in infrastructure, design targeted subsidies, and plan for future workforce needs. To realize this potential, ASEAN countries are piloting and scaling methods such as regular time-use surveys, satellite care accounts, and valuation techniques including specialist replacement-cost and proxy-good approaches. Building statistical capacity, harmonizing regional methodologies, and embedding care indicators into policy and budget processes will be essential to ensure that measurement directly drives better decisions, stronger investments, and fairer distribution of care responsibilities.



Timor-Leste's National CARES Study, developed with ESCAP, UN Women, and the Institute of Development Studies, quantified the heavy care burden carried by women: 57 hours per week of unpaid care versus 17 hours for men. The study informed the creation of the Timor-Leste Working Group on Care and guided investment priorities. Key recommendations include strengthening time-use surveys, improving statistical capacity, and promoting shared caregiving through flexible work, parental leave, and gender-transformative community initiatives.



Executive Director Nharleen Santos-Millar of the Philippine Commission on Women and Associate Professor Rahul Malhotra of DUKE-NUS Singapore share examples of care work valuation in practice.

In the Philippines, the government has developed satellite care accounts and applied the specialist replacement-cost method to assign economic value to unpaid care. The country is training statisticians to analyze time-use data and incorporate valuation into national accounts and budgeting processes. This evidence has strengthened investment cases for childcare and eldercare infrastructure, employer-supported services, and targeted fiscal measures. By institutionalizing care measurement, the Philippines demonstrates how visibility can translate into concrete policies that support redistributive, gender-responsive, and inclusive care systems.

In Singapore, the government applies proxy-good valuation methods to estimate the market cost of replacing unpaid care and to design subsidies such as the Home Care Grant (from SGD 250–400 to SGD 600 in 2026). Measurement has revealed structural dependencies—more than 70 percent of nursing-home workers are non-Singaporean, and around 25 percent of migrant domestic workers act as live-in caregivers—highlighting long-term sustainability challenges. These insights are prompting reforms focused on professionalizing care work, strengthening domestic capacity, and reducing reliance on migrant labor through structured career pathways.

Building Inclusive Digital and Data Systems for Care

Digital transformation is reshaping care delivery across ASEAN, yet fragmented systems, weak interoperability, and gaps in digital literacy risk leaving vulnerable communities behind. While technology offers opportunities to improve efficiency and coordination, the absence of inclusive design and robust data governance means that digital care could deepen inequalities rather than close to them. Limited access to secure platforms and uneven connectivity further constrain efforts to integrate care into national and regional systems.

Embedding digital innovation into care policy can shift this trajectory by creating interoperable data ecosystems, enabling predictive analytics, and supporting evidence-based decision-making. Inclusive digital systems allow governments to identify service gaps, design targeted subsidies, and plan for future workforce needs. To realize this potential, ASEAN countries are advancing initiatives that prioritize technology and data for care delivery and monitoring, alongside regional efforts to close gender gaps in digital participation. Building capacity, harmonizing standards, and embedding inclusivity and security into digital care systems will be essential to ensure technology strengthens resilience and equity rather than reinforcing existing divides.



Developed by La Trobe University's Care Economy Research Institute, the Care Data Portal is a centralized platform that maps health and social care datasets across sectors. It is designed to map "care deserts", which are geographic and demographic areas where care services are limited or absent, while highlighting disparities in service access and workforce distribution. In parallel, it recognizes the need to bridge digital literacy gaps among older caregivers to ensure equitable access to digital care resources, services, and information. Featuring interoperability and detailed metadata tagging across temporal, geographic, and population dimensions, the portal operates as a collaborative "open but moderated" environment. By consolidating fragmented data systems, it strengthens evidence-based policymaking and promotes regional data sharing across ASEAN.

Strengthening and Professionalizing the Care Workforce

Strengthening and professionalizing care across ASEAN is critical, as the sector remains undervalued and fragmented, facing persistent staff shortages, high turnover, and limited recognition that undermine service quality and sustainability. Heavy reliance on informal and migrant labor, coupled with inadequate wages and career pathways, perpetuates systemic vulnerabilities and constrains the sector's capacity to meet rising care demands. Without formal standards and structured training, care continues to be seen as low-skilled, reinforcing gender norms and limiting economic participation.

Professionalizing the care workforce can transform this narrative by establishing clear certification systems, competency frameworks, and career progression pathways that elevate care to a dignified and skilled profession. This shift enables governments to improve service quality, attract and retain talent, and reduce dependency on informal arrangements. ASEAN countries are advancing measures such as vocational training programs, micro-credentialing for informal caregivers, and national targets like Malaysia's plan to train 50,000 caregivers by 2030. Embedding labor standards, fair remuneration, and social protections into policy frameworks will be essential to ensure decent work and gender equity.



Thailand's Family Care and Protection Programme highlights the role of targeted training and digital skills development in strengthening the care workforce. Through structured training of 35 caregivers, the program builds core caregiving competencies while equipping workers, many of them women and older caregivers, with practical digital skills needed to engage with technology-enabled care. This investment in skills and confidence improves service quality, coordination, and continuity of care, particularly in community settings. With plans for national scale-up, the program demonstrates how workforce training that integrates digital capability is essential to professionalizing care and expanding decent work opportunities.



Minister of Women, Family, and Community Development Datuk Seri Nancy Shukri leads the launch of Malaysia's Care Strategic Framework and Action Plan 2026–2030, setting the direction for a sustainable and inclusive national care ecosystem..

Malaysia's newly launched Care Strategic Framework and Action Plan 2026–2030 positions workforce development as a central pillar of its national care strategy. The plan introduces competency frameworks, quality standards, and micro-credential training for both formal and informal caregivers, aiming to elevate care work into a recognized profession. Under the 13th Malaysia Plan, Malaysia has set a target of producing 50,000 caregivers by 2030, supported by structured career pathways and comprehensive social protections.

These measures are designed to address chronic workforce shortages and high attrition rates while promoting gender equality and reducing reliance on informal or migrant labor. By embedding professional standards and workforce development into national policy, Malaysia's framework aims to transform care work into a valued and sustainable career that supports long-term resilience in the care economy.

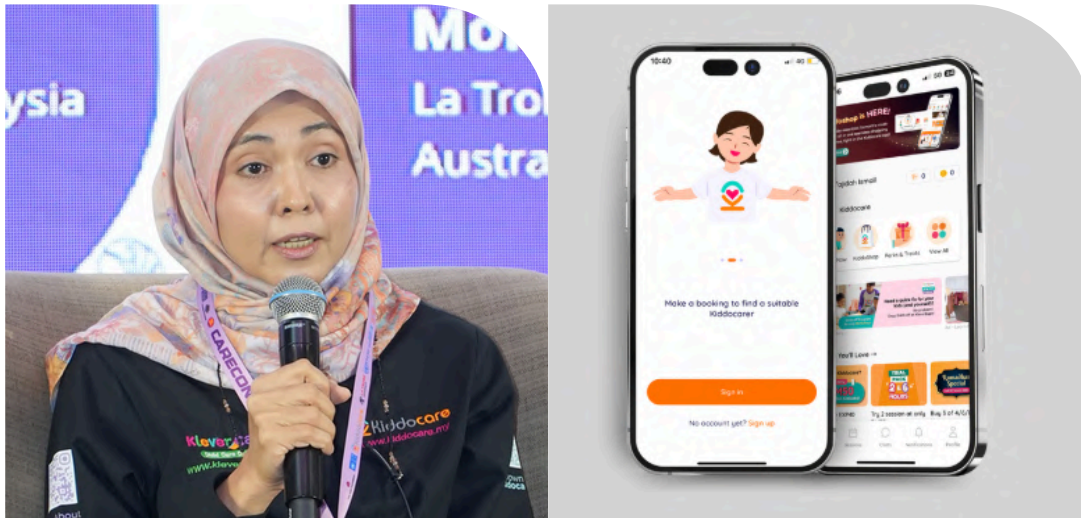
Expanding Innovative and Sustainable Partnerships and Financing for Care

Expanding partnerships and innovative financing for care is critical across ASEAN, where ageing populations, changing family structures, and climate-related shocks are increasing demand for long-term and community-based services. Traditional government budgets alone cannot meet these rising needs, and fragmented planning, inconsistent professional standards, and limited data transparency further constrain the region's ability to deliver accessible, quality care. These gaps disproportionately affect women, who continue to carry the majority of unpaid caregiving responsibilities.

ASEAN member states are exploring blended finance, public-private partnerships, philanthropic contributions, and outcome-based funding to scale sustainable care solutions. Strategic regional mechanisms, such as pooled funds or long-term care financing models, alongside investments in workforce training, certification, and cross-border accreditation, can professionalize care and support evidence-based policymaking. By adopting a collaborative approach that links governments, private actors, and communities, ASEAN can ensure inclusive, gender-responsive, and life-cycle-oriented care systems. With coordinated financing and partnerships, care can become a driver of decent jobs, social protection, and resilient societies across the region.



In Vietnam, VIOBA (Vietnam Organisation for Better Aging) promotes intergenerational self-help clubs that support older people to age independently within their communities. The clubs are self-managed, organizing health checks, home visits, and peer learning, while partnerships with local government provide medical staff and equipment. Certified volunteers offer companionship and monitor wellbeing. By addressing digital exclusion and reframing care as empowerment and livelihood support, VIOBA strengthens autonomy, dignity, and community participation. Recognition, peer learning, and small incentives sustain engagement, demonstrating a scalable and inclusive care model.



Kiddocare CEO and Founder Nadira Yusoff talks about the use of innovative technology to address care needs in local communities, and the importance of public-private partnerships in the care economy.

In Malaysia, Kiddocare uses technology to connect families with trusted childcare and eldercare providers, helping raise standards in the care sector. Through multi-layered caregiver verification, continuous data collection, and quality monitoring, Kiddocare builds trust and transparency in care services. Its Care Connect platform links childcare centers, elderly care facilities, and local authorities, enabling targeted investments in underserved areas. By leveraging cross-sector partnerships and data-driven financing, Kiddocare improves service quality, caregiver income, and creates a sustainable, scalable care ecosystem.

Across the region, UN Women has strengthened care systems through its Transform Care initiative and Care Accelerator Programme, promoting partnerships between governments, businesses, and communities. The approach supports gender-responsive policies and institutional frameworks, while private sector engagement provides incentives, technical guidance, and policy support rather than direct funding. Grassroots examples, like Timor-Leste's Mother Support Group, demonstrate how public-private collaboration delivers effective, context-specific care. Robust data on care supply and demand underpins evidence-based financing and helps scale sustainable care solutions across the region.

Integrating Care into Climate and Disaster Resilience Planning

Climate change and recurring disasters are reshaping care needs across ASEAN. Extreme weather, prolonged displacement, and disrupted services increase both unpaid and paid caregiving demands, particularly for women, older persons, and people with disabilities. However, regional resilience planning often treats care as a secondary concern rather than a core part of climate and disaster strategies. Key gaps include siloed planning across sectors, weak data on care burdens, limited recognition of care in national climate strategies, and insufficient financial and service systems to support caregivers under stress.

Integrating care into resilience planning would protect vulnerable households, preserve livelihoods, and unlock the care economy's potential to create decent work, particularly for women, while strengthening social protection and community preparedness. Work by The Asia Foundation and Canada's International Development Research Centre (IDRC) clarifies the link between climate change and care, showing how environmental shocks increase care demands while weakening care systems. Embedding care in climate resilience is both a social necessity and a strategic investment that builds adaptive capacity, reduces recovery costs, and supports more equitable development across ASEAN.



The Asia Foundation and Canada's IDRC produced a policy brief to advance resilient care economies in Asia and the Pacific. It links climate change and care work, showing how environmental shocks raise care demands while weakening care systems, especially for women and marginalized groups. The brief calls for integrating care into climate plans, expanding data and research, mobilizing climate finance for care, creating care jobs in green transitions, and investing in green care infrastructure through an intersectional approach.

A collaboration between the Malaysia Industry-Government Group for High Technology (MIGHT) and UNDP studied how climate and geographic changes affect care work and community resilience. The project identified 155 future implications across six areas and tested 500 policies. It found strengths in labor adaptability but gaps in healthcare, fiscal preparedness, and local challenges in places like Sarawak. The study highlighted the need for data-driven planning, community-based solutions, and cross-sector collaboration to support inclusive care systems and strengthen climate resilience.

Initiatives like the TAF-IDRC climate-care work and the MIGHT-UNDP foresight project suggest the value of integrating care considerations into climate and disaster resilience planning. By applying scenario analysis, stress-testing, and anticipatory governance approaches, these efforts provide early evidence on how care needs can be identified in advance, helping to guide policy design, investment priorities, and infrastructure planning. While still evolving, such approaches suggest that embedding care into climate resilience planning can improve preparedness, promote more inclusive systems, and strengthen the ability of communities across ASEAN to adapt to future shocks.

Conclusion and Recommendations

This is a pivotal moment for ASEAN to address the care economy. Demographic changes, shifting household structures, and mounting care demands create both urgency and opportunity to reframe care as a socially shared responsibility.

CARECON 2025 reinforced that the next frontiers—measurement, digital and data systems, workforce professionalization, financing and partnerships, and climate-sensitive planning—must be advanced together. Critically, progress also requires positioning caregiving as a shared social responsibility. Engaging men as active caregivers is essential to redistributing care, reducing women’s time poverty, and expanding labor-market participation for all.

Regional and country practices including rigorous time-use measurement, satellite accounts, targeted subsidies, community care hubs, and digitally enabled home-care models demonstrate practical and scalable pathways. However, scaling these models requires stronger policy foundations, predictable financing, interoperable data systems, and deliberate investments in skills and decent work. It also calls for ASEAN to deepen knowledge exchanges within the region and with partners such as Australia to transfer lessons on integrated home-based care, telehealth, vocational training and social protection design.

Aligning care reform with the Sustainable Development Goals, particularly SDG 5 on gender equality, SDG 3 on health, SDG 8 on decent work, and SDG 13 on climate action, will help secure political momentum and financing. If ASEAN harnesses regional cooperation, harmonized standards, blended financing, and intentional norm-change strategies that include men, care can shift from an invisible cost to a measurable driver of inclusive growth, resilience, and social cohesion, strengthening societies, livelihoods, and national development across the region.

The following recommendations represent an ongoing regional conversation to strengthen and advance the care ecosystem in ASEAN, guiding member states toward more inclusive, resilient, and sustainable care systems.

Strengthening Policy and Governance

Across ASEAN, demographic ageing, migration patterns, and shrinking household sizes are rapidly increasing demand for care, yet policy frameworks remain uneven and fragmented. Governance gaps between health, labor, social welfare, and women's ministries create inconsistent service delivery and weak accountability. Embedding care within national development plans is essential to elevate it from a family responsibility to a strategic regional priority aligned with the ASEAN Declaration on Strengthening the Care Economy. Member states should adopt rights-based, life-course care policies, legislate entitlements such as parental leave and caregiver support, and align fiscal frameworks to secure long-term investment. Workforce reform must be central: setting competency standards, national certification, fair wages, and career pathways, while strengthening local government capacity. Building a professional, protected, and recognized workforce will reduce reliance on low-paid, migrant labor and support decent work across the region.

Expanding Partnerships, Financing and Skills Investment

ASEAN countries face significant disparities in care infrastructure and financing capacity, making collaboration and diversified funding essential for scale. Public budgets alone cannot meet rising care needs, particularly in lower-income and rural areas. Mobilizing blended finance, regional pooled funds, and joint ASEAN financing mechanisms can strengthen childcare, eldercare, and disability services. Public-private-people partnerships are especially critical in Southeast Asia, where community actors and private providers already fill service gaps. Deeper ASEAN-Australia cooperation can provide joint pilots, co-financing, technical training, and models for integrated home-based care and volunteer-based and community care centre models, ensuring sustainability without compromising community ownership and autonomy. Fiscal incentives, corporate social responsibility alignment, and impact-investment instruments can further encourage private sector participation in care technology, training institutions and workplace-based support, while also increasing regional skills development and labor mobility.

Advancing Data, Research and Regional Learning

Evidence gaps are a major constraint across ASEAN, where many countries still lack systematic data on unpaid care, caregiver well-being, and service quality. Without comparable indicators, benchmarking progress across member states remains difficult. Institutionalizing time-use surveys, satellite care accounts, and harmonized definitions will allow ASEAN to measure care's economic value and track system performance

more consistently. Investing in statistical capacity, including local enumerators and planners, will strengthen national decision-making. Establishing ASEAN learning platforms, policy laboratories and joint research grants can accelerate the exchange of promising practices such as community care hubs, telehealth models, and social protection innovations. Regional knowledge collaboration, including with partners like Australia and UN agencies, will help ASEAN adapt reforms to diverse cultural and socio-economic contexts.

Deepening Community Engagement in Care Systems

Deepening community engagement is critical to ensuring that care reforms are grounded in lived realities and responsive to local needs. Effective care systems must work with, not around, cultural and community dynamics. Supporting community-led care models, such as intergenerational clubs, village childcare groups, and community care huts, strengthens social cohesion while expanding access to locally available care solutions. Participatory design processes should centre the voices of caregivers, including migrants, informal carers, older persons, and persons with disabilities, who are often invisible in policymaking. By embedding care within community ecosystems and strengthening community ownership of solutions, ASEAN countries can improve service reach, ensure culturally relevant delivery models, and build inclusive care systems that reflect diverse care needs.

Shifting Gender Norms to Redistribute Care Responsibilities

Social norms across ASEAN continue to place the majority of unpaid care on women and girls, constraining their economic participation and reinforcing structural gender inequality. Addressing care gaps, therefore, requires deliberate efforts to redistribute care responsibilities more equitably across households, communities, and institutions. Public campaigns, school-based programs, and partnerships with religious and community leaders can help normalise men's caregiving roles, while workplace policies and male caregiver visibility initiatives reinforce behaviour change. Reducing women's time poverty is central to unlocking labour force participation and economic empowerment. When gender norms evolve, and caregiving is recognised as a shared social responsibility, care systems become more equitable, resilient, and better positioned to reduce gender gaps across ASEAN.

Building Digital, Green and Resilient Care Systems

ASEAN's diverse geography increases the urgency of building digital and climate-resilient care systems. Gaps in connectivity, digital literacy, and affordability limit service access for rural communities, older persons, and women. Developing interoperable, user-friendly digital platforms that connect families, providers, and institutions can improve efficiency and coordination across childcare, eldercare, and social protection. Digital inclusion programs are essential to ensure that all groups, especially women and low-income households, benefit from technology. Green and climate-resilient infrastructure, including energy-efficient care centers and mobile outreach units, is vital in a region highly exposed to floods, heatwaves, and disasters. Integrating digital innovation with low-carbon and resilience planning ensures continuity of care, even during shocks, and aligns with ASEAN's sustainability commitments.

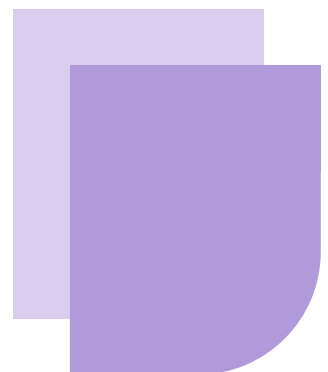


About CARECON 2025

The New Frontiers in the Care Economy Conference (CARECON 2025) brought together care champions, policymakers, practitioners, and regional partners to advance a shared vision for sustainable, inclusive, and equitable care systems across ASEAN. Organized by Malaysia's Ministry of Women, Family and Community Development, with support from the Government of Australia, and in close collaboration with the ASEAN Secretariat, The Asia Foundation, La Trobe University, UNDP, ESCAP, UN Women, UNICEF, UNFPA, Kiddocare and other regional partners, CARECON 2025 served as a regional platform for member states to exchange innovative models, build partnerships, and explore emerging frontiers of the care economy.

About The Asia Foundation

The Asia Foundation is an international nonprofit organization working to solve the toughest social and economic challenges in Asia and the Pacific. Informed by more than 70 years of experience and deep local knowledge, we work with partners across more than 20 countries to improve lives and expand opportunities. To learn more, visit asiafoundation.org.





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