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Early Childhood Care and Education Landscape Overview

**IMPROVING OUTCOMES FOR CHILDREN, WOMEN, FAMILIES
AND SOCIETIES THROUGH CATALYTIC INVESTMENT**

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ACRONYMS

ASER	Annual Status of Education Report (India and Pakistan)
BRAC	Bangladesh Rural Advancement Committee
CGD	Centre for Global Development
DSD	Department for Social Development
ECCE	Early Childhood Care and Education
ECD	Early Childhood Development
ELP	Early Learning Partnership (World Bank)
FCDO	Foreign, Commonwealth and Development Office
GDP	Gross Domestic Product
GGGR	Global Gender Gap Report
GPE	Global Partnership for Education
HBCC	Home-Based Child Caregivers
HBCP	Home-Based Care Providers
HCB	<i>Hogares Comunitarios de Bienestar</i>
ICDS	Integrated Child Development Services
IDB	Inter-American Development Bank
IDELA	The International Development and Early Learning Assessment
ILO	International Labour Organization
IMF	International Monetary Fund
LAC	Latin American and Caribbean region
LMICS	Low -and- Middle Income Countries
MICS	Multiple Indicator Cluster Survey
MOHCDGEC	Ministry of Health, Community Development, Gender, Elderly and Children
MOWCA	Ministry of Women and Children Affairs
RCT	Randomized Controlled Trial
SABER	Systems Approach for Better Education
SEWA	Self Employed Women's Association
UNICEF	United Nations Children's Fund
USAID	United States Agency for International Development
WAGE	Women and Girls Empowerment Committee
WEC	Women's Economic Empowerment
WIEGO	Women in Informal Employment Globalizing and Organizing

Introduction

Investments in Early Childhood Care and Education* (ECCE) can produce a triple social and economic dividend by improving health and education outcomes for children, by increasing women’s employment and productivity, and by creating new jobs and supporting economic growth.



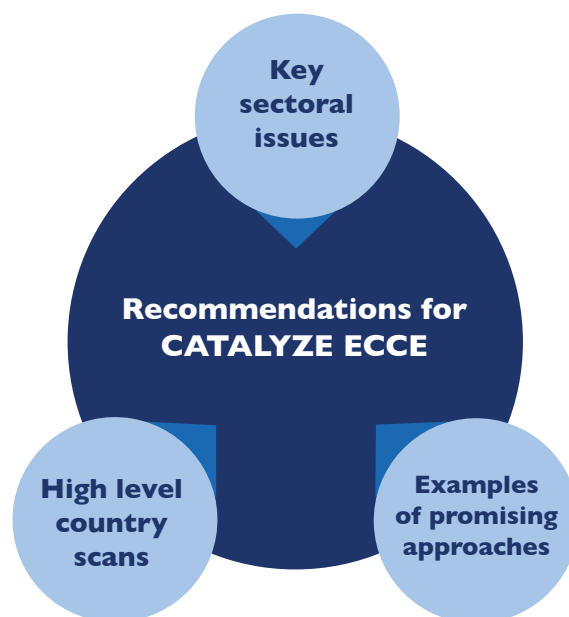
This landscape overview explores the potential for catalytic non-state investment to help achieve the possibilities of this triple dividend and provides recommendations to USAID (United States Agency for International Development) missions and potential investors. The review covers four sections.

Global review: Section One provides an overview of the ECCE sector in relation to each area of the triple dividend and the current state of ECCE financing. It presents technical issues that CATALYZE should consider when developing investments.

Country scans: Section Two presents a series of high-level country scans. The scans provide an initial indication of how conducive the country context might be to catalytic investments, who potential collaborators are for CATALYZE investments; and where there are potential entry points.

Promising approach examples: Section Three presents a series of promising approaches that contribute to the triple dividend in LMICs (Low- and Middle-Income Countries). The scans outline their approach, impact, and the financing model in order to learn lessons and identify options for future investments.

Conclusions and recommendations: Section Four draws on findings from all previous sections and offers a set of general principles for investing in ECCE, a way of thinking about country readiness for investment in ECCE, and recommendations about how to structure investments.



* ECCE refers to services provision to young children that both encompasses aspects of learning, as well as aspects of providing for children’s nurturing, support, guidance, or supervision. This can include childcare services, which have “the primary objective of caring for children while parents are working while ensuring children have opportunities to learn and develop positive relationships with caregivers and peers” (Devercelli and Beaton-Day, 2020) for children ages 0-6 years, pre-school or primary learning settings for children ages 3-6 years and transition to primary school (ages 6-8 years).



SECTION I

Global status of delivering on the triple dividend

I.1 Improving child development outcomes through enhancing access to quality ECCE

The first element of the triple dividend is improved child development outcomes. To achieve this outcome, both ECCE access and quality need enhancing.

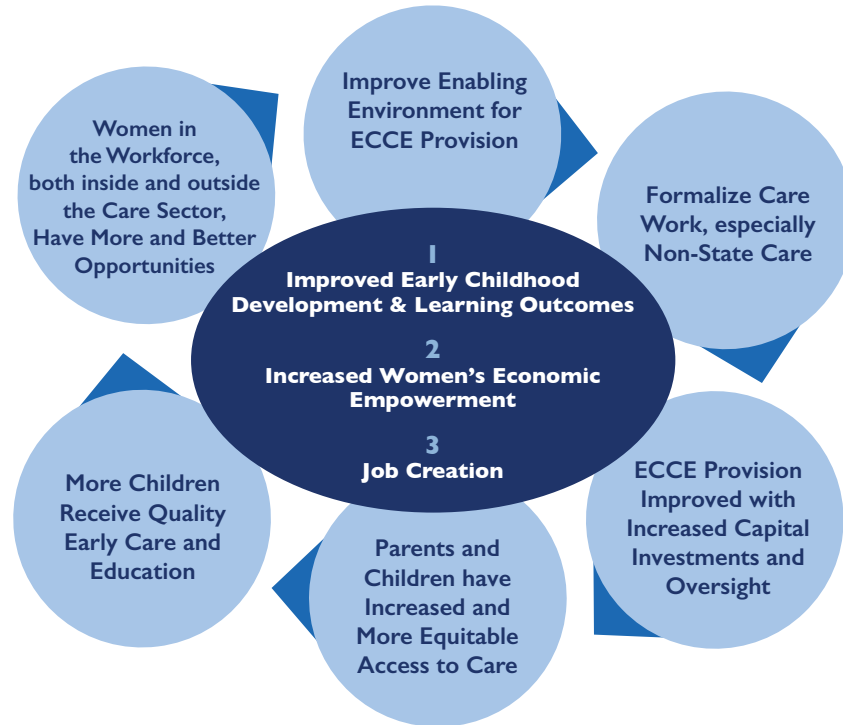
I.1.1 Access to ECCE

Access to ECCE: A recent report from the World Bank estimates that more than 40 percent of all children below primary-school age (350 million) need childcare services do not have access to services.¹ Regional and global studies show that 80 percent of these children are in LMICS, where 73 percent of those under 3-years lack an appropriate level of care and supervision,² and more than 20 percent of children under the age of five are left unsupervised for an hour or more per week.³

350 million children below primary-school age do not have access to ECCE childcare services.

80 percent of children without access to ECCE are in low and middle-income countries.

ECCE Triple Dividend



While access to pre-primary services has increased significantly over the last two decades to 62 percent globally, only 20 percent of children in LMICs have access to services.⁴ Moreover, significant barriers to access remain within countries because of geographic location, socioeconomic status, or other factors.

Data on ECCE is limited globally. However, a study utilizing survey data from 31 LMICs showed that only four percent of women accessed an organized childcare program, with another four percent relying on hired domestic help.⁵ Information on families able to access some form of paid childcare indicates that about 0.5 percent came from the poorest households.⁶

Access for marginalized groups: While existing research does not focus on the needs of parents caring for children with disabilities in LMIC countries,⁷ it is clear only a small proportion of disabled children are attending formal ECCE. An even smaller proportion receive the specialized support they need. A UNICEF survey in November 2021 estimated there are 240 million disabled children in the world of whom 49 percent are

outside the education system and 24 percent are unlikely to receive early stimulation and responsive care. Children in crisis and conflict situations including refugee camps are also vulnerable to a significant lack of care.



In LMICs, only **4 percent** of women accessed an organized child care program, with another **4 percent** relying on hired domestic help.

HIGH FEES ARE A BARRIER TO ECCE

Families in the LAC region often spend more than **10 percent of their household income** on child care fees



In Sub-Saharan Africa, this cost can be as high as **25-50 percent**

Barriers to access: Cost data can be difficult to find in some low-income contexts. Surveys of individual parents in multiple countries consistently highlight the cost of childcare for parents as the biggest barrier to engaging in childcare services,⁸ an often insurmountable one.⁹ There is, however, evidence that some families in the Latin American and the Caribbean (LAC) region spend more than 10 percent of their household income on fees and up to 25 to 50 percent in parts of sub-Saharan Africa. Costs include transportation and additional childcare required to fill gaps between parents' work schedules and ECCE program schedules, as well as tuition fees. There is compelling evidence that when cost burdens can be reduced—through public provision, subsidies, cash transfers, corporate engagement, or public private partnerships—more families use childcare, and more women enter the workforce. For example, when provided with subsidized childcare services, mothers in Nairobi, Kenya were 20 percent more likely to send their children to childcare and 17 percent more likely to re-enter the workforce.¹⁰

CREDIT: ASHWIN MUDIGONDA



In Ethiopia, **50 percent** of rural girls aged 5-8 provide some daily child care to younger siblings.

When there is no access: When there is no childcare provision, children are left in a variety of sub-optimal situations. Some women have no choice but to take children to work with them. This potentially places children in dangerous situations, does not provide developmentally supportive environments, and can limit the ability of women to work. Other children are left with friends or family members, or even left home alone. It is estimated that 35 million children worldwide are subject to informal arrangements and almost half of these are in the lowest income countries.¹¹ In many locations, older children, usually girls, provide unpaid care. In Ethiopia 50 percent of rural girls aged 5 to 8 provide some daily oversight of younger siblings,¹² resulting not only in poor childcare but also limiting the potential education of older girls.

1.1.2 Quality of ECCE

Quality of outcomes: The quality of ECCE provided inevitably impacts a wider set of development outcomes, such as those presented in the Nurturing Care Framework.¹³ These include the health and nutrition of children and their caregivers, provision of safe and secure environments, access to quality early learning opportunities, and the ability to respond to individual children’s needs. Ideally, children who attend quality ECCE programs should receive integrated care that supports these broad development outcomes, including supplemented nutrition, preventative medical care, and socio-emotional stimulation. This is rare but can be found in the best examples across formal, community-based, and home-based childcare settings.¹⁴

Structural and process quality: Quality in ECCE programs is often discussed in terms of structural and process quality. Structural quality variables are those related to how ECCE programs are formed, including available infrastructure and materials, ratio of caregivers/teachers to children, their qualifications, etc. Process quality variables include aspects related to how programs run, such as the interactions between children and caregivers, curricula, and teachers’ and others’ care/pedagogical practices. Process quality drives learning and development outcomes, while structural quality supports process quality. Structural quality is easier to measure than process quality. Process quality is rarely measured in LMICs, outside of small-scale program evaluations.¹⁵

Workforce development and quality: Globally, a large proportion of the current ECCE workforce is informal. Both informal and many formal workers often lack relevant qualifications or access to training and support. Some are teachers who were trained to teach primary school children, but do not have the age-appropriate and rounded skills required to work effectively with younger children. ECCE training and development are mostly provided by non-state actors.



CREDIT: USAID SOUTHERN AFRICA

Measuring quality: Studies show that in most LMICs, ECCE quality is limited. In addition to a lack of trained providers, there may be too many children in any one group, too few play and learning resources, inappropriate infrastructure,¹⁶ and sub-optimal quality of interactions between children and caregivers. In most childcare locations, child outcomes, process quality, or structural quality are not measured, and the service provided is largely unmonitored.¹⁷ One additional challenge to measuring quality is the lack of widely agreed upon and accepted measurement tools and indicators.

Parental perceptions of quality: In many LMICs, parents lack understanding of the importance of ECCE for children’s development, including the importance of play in building foundational skills and how these skills support future academic learning, as well as the significance of whole-child development. Parents are often attracted by programs that promise early academic learning or instruction in an international language which is different from the language that children speak at home. This can mean the market is incentivized to provide services that do not fully address children’s developmental needs.

1.1.3 Recommendations for enhancing access and quality through CATALYZE ECCE investments

<p>Prioritize investments that support marginalized children aged 0 to 3 as well as those aged 3 to 8</p>	<p>Prioritize investments that support multisectoral approaches to childcare and early education, with a focus on whole-child development and linkages to multisectoral services</p>	<p>Prioritize investments that support program-level ECCE workforce development and development of systemic improvements in workforce quality, including support for caregivers and parents</p>
<p>Prioritize investments that focus on the sustainability, as well as quality, of care services through support of business management skills and development of new revenue streams</p>	<p>Prioritize investments that include parental education and behavior change programming which helps parents better understand provider quality and value, as well as support achievement of ECCE programs’ goals of long-term child development</p>	<p>Consider the development and adoption of a core set of indicators across CATALYZE ECCE investments to track quality and impact on children and their families</p>

1.2 Childcare and enhancing women’s economic empowerment (WEE)

The second pillar of the triple dividend is the contributions that childcare can make to women’s economic empowerment.

1.2.1 Care that supports women’s economic empowerment

Labor force gender gaps and unpaid care work: In many LMICs there are significant gender gaps in the labor force. Global economic participation and opportunities available to women are assessed at just 58 percent of those available to men, a gap, which given current progress, will take 267 years to close.¹⁸ The burden of unpaid care work and discriminatory social and gender norms around care and child development are significant contributory factors.¹⁹ It is estimated that women undertake over three times more unpaid work than men. Unpaid care work is responsible for reducing women’s economic opportunities in multiple ways, especially in terms of preparation for, and time to engage in, paid work.^{20, 21}

Impact of ECCE on women’s economic empowerment: Access to and financial support for access to childcare services can increase women’s wages by 20 to 50 percent and reduce unemployment by an estimated 40 percent.²¹ It is not only the rate of labor force participation that is affected by the lack of childcare, but also the type of work available. Taking children with them to work is the only option for women faced with no accessible childcare.²³ Given that childcare is female-dominated and low paid, formalizing the ECCE sector could significantly boost female economic empowerment.

Childcare that meets the needs of different working women: Childcare options need to be as varied and flexible as women’s paid work, including informal work.²⁴ Some of the world’s most vulnerable children are those of informal workers and those who follow a non-traditional work schedule.²⁵ Various studies show that programs designed to increase women’s income earning opportunities can be hampered by childcare that is not provided where needed, nor fits around women’s working hours.²⁶



IMPACT ON **WOMEN’S ECONOMIC EMPOWERMENT**



Global economic opportunities for women are assessed at **58 percent of those available to men.**

Access to childcare can increase women’s wages by **20 to 50 percent** and reduce unemployment by an estimated **40 percent.**

1.2.2 Social and gender norms

Tackling the disproportionate unpaid work burden and social norms: While access to ECCE will reduce some of the unpaid work burden women carry, it will not eliminate it. A reduction in unpaid work does not necessarily mean an increase in paid working hours. This is often due to men not increasing the amount of unpaid care work they do as a women engages in more paid work. Without a shift in gender norms and greater sharing of unpaid family work responsibilities, women become overburdened, quality of care decreases, quality of women’s work decreases, and overall family wellbeing suffers. In some places, there is a perception that children suffer when women do paid work.²⁷ However, studies in LMICs show that maternal employment is linked to better overall infant and young child feeding²⁸ practices, more frequent, nutritious and diverse meals for young children,²⁹ as well as a better standard of living for children, access to medical care, and other benefits. Evidence from randomized controlled trials (RCTs) in South America shows that ECCE provision not only increases families’ economic opportunities, but also reduces stress and violence.³⁰



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1.2.3 Recommendations on women’s economic empowerment through CATALYZE ECCE investments

<p>Prioritize investments that support early childcare and early education investments and consider increasing women’s economic empowerment with flexible length of care and proximity of services</p>	<p>Prioritize investments that locate childcare and early education services near parents’ work commitments or dwellings to reduce travel time and cost</p>	<p>When feasible, incorporate behavior change communications to address social and gender norms around unpaid work and care, as well as the positive impact of mothers’ paid employment on their children</p>
<p>Incorporate men into early childcare and early education investments</p>	<p>Measure investments’ impact on women’s empowerment and wellbeing, looking not only at employment and income, but at women’s overall work burden and mental health</p>	

1.3. The contribution of childcare to economic development, business, and jobs

The third pillar of the triple dividend is the contribution that childcare can make to economic development, the positive impact it can have on businesses, and the jobs it can create in various ways.

1.3.1. The economic development opportunity

A 2017 International Labour Organization (ILO) study estimated that closing the gender gap in labor force participation by 25% could increase global GDP (Gross Domestic Product) by \$5.3 trillion by 2025.³¹ The unpaid work undertaken by women is valued at up to \$10 trillion annually, or about 13 percent of global GDP.³² Increasing access and quality of childcare could further unleash the economic contribution of women to the global economy. For this to happen, creative solutions need to be found that involve more effective regulation, adequate and varied finance, and strong collaboration between state and non-state actors.

1.3.2. The impact of ECCE on businesses

The International Labour Organization (ILO) report, “Costs and benefits of investing in transformative care policy packages: A macrosimulation study in 82 countries,” confirms that funding high quality universal care provision is an investment that accrues wider benefits beyond direct users.³³ Childcare investment can provide a powerful economic stimulus to help deal with the aftermath of the COVID-19 pandemic, which saw many jobs and livelihoods destroyed. Such investment has gender-equalizing effects on employment and caring roles. IFC reports on employer-based childcare in places such as Pakistan and Bangladesh cite childcare’s positive impacts on business, including greater productivity, employee wellbeing, and reputational benefits.³⁴

1.3.3. The impact of ECCE on jobs

The expansion of ECCE creates jobs in the care economy and enables parents and grandparents to gain and retain employment. A study on the impact of free childcare on labor supply in Brazil provides strong evidence for the positive labor market affects.³⁵ The study, which used a randomized controlled trial over six years focused on low-income neighborhoods of Rio de Janeiro, found that the provision of daycare facilities resulted in a sustained increase in income associated with labor market outcomes for grandparents, particularly grandmothers, residing in the same households as the children attending daycare. This impact was still apparent four and half years after initial randomization. An ILO report extrapolates such findings globally stating



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Unpaid work undertaken by women is valued at up to **\$10 trillion yearly** or about 13 percent of global GDP.

IMPACT AT SCALE



An ILO report states that universal provision of long-term care needs (not just childcare) could generate **280 million jobs by 2030**.

Of those, **78 percent** would go to women and **84 percent** would be formal employment.

that universal provision of long-term care needs (not just childcare) could generate 280 million jobs by 2030 and a further 19 million by 2035. Of these, 78 percent would go to women and 84 percent would be formal employment. By 2035, employment rates could increase by a global average of 6.3 percent. Employment rates for women could rise by ten percent overall.³⁶ This shows the magnitude of the potential impact of expanding ECCE could have on jobs.

1.3.4 Recommendations for economic development and ECCE jobs through CATALYZE

Focus on scalable approaches, such as scaling childcare, to increase jobs created and economic development impact

Prioritize investments that are explicitly targeting **job creation and job improvement outcomes**, as well as child development improvements

Ensure care provided is **flexible enough to enhance employment possibilities** for women and men using childcare services

Collaborate with private employers on childcare locations and hours so that employees can access care and companies can benefit from increased employee wellbeing and productivity

Support development of **entry points into the care economy** workforce and develop employment pathways

I.4. Regulation, policy, and financing of ECCE

I.4.1 Regulation and policy

Regulation and policy have an important but complex role to play in the ECCE sector. To be successful, they must incentivize innovation, support expansion of service provision, stimulate improvements to quality, and avoid creating additional barriers. Regulation should increase quality without stifling innovation or creating hurdles to informal providers formalizing childcare provision.

Family-friendly legislation: Laws in LMICs governing the availability of publicly funded or supported childcare for young children, employment policies allowing flexibility for caregivers, family leave, and monitoring of services are shown to drive more effective ECCE.³⁷

ECCE and ECD-related regulation: It is encouraging that many countries expanded their focus on ECCE and early childhood development (ECD) policies, such as the National Integrated Early Childhood Development Policy in South Africa. While these policies are the foundation for greater formalization of ECCE, they are often poorly implemented. Many are focused on child development with little consideration of women's economic empowerment, youth workforce development, or business productivity. In addition, unrealistic legislation can create barriers that deter informal providers from adjusting and entering the formal childcare sector. Public institutions have a key role in implementing licensing and quality assurance regulations. Many countries need support to develop these regulatory capacities.³⁸

Coordination and collaboration: Support for children's whole care and development (0 to 8-years-old) must entail the coordinated engagement of multiple sectors. Services for young children and their families have multiple entry points, including preschools, community childcare activities, parenting education programs, and in particular, health provision.³⁹ Effective childcare needs coordinated actions from actors across all these sectors.

I.4.2 Financing ECCE

Responsibility for ECCE often straddles different government departments, with a lack of clarity regarding budgeting responsibility. Often, there is an overlap in roles and functions for different aspects of child development covered by many government agencies. These areas can include family welfare, women's affairs, economic development, and labor ministries. Early learning is usually considered the responsibility of the education ministry. There is usually no connection to wider care issues. In addition, the costs of providing universal childcare may well be out of reach for many low-income countries. In almost all countries, both early childhood care and education are significantly underfunded. Currently, ECCE is financed from a complex variety of sources.⁴⁰

Public financing: LMICs collectively spent about \$5 billion in 2016 on ECCE, while actual funding needed was estimated at around \$33 billion.⁴¹ In the countries where USAID works and where spending data is available, more than 80 percent spend less than 10 percent of their basic education funds on ECCE, and 25 percent of countries spend less than one percent.⁴² With a few exceptions where public childcare subsidies are provided, such as in Colombia and other places in Latin America, public financing of childcare before pre-school is even lower. While some ECCE experts advocate for a much greater private-sector role in financing, others note that the expansion of ECCE coverage is not possible without some type of public funding engagement in early childcare and education.

Private financing: Given public financing of ECCE will likely remain limited, private finance is critical to support its expansion. The opportunity for different types of private finance in ECCE is significant. A few of the most notable types include:

- **User fees:** ECCE provision financed through parental fees is a common approach, although affordability is a significant challenge as fees range from low-cost to much higher fees.
- **In-kind contributions:** Private in-kind contributions sometimes supplement or replace user fees. Non-state actors may also provide buildings, materials, or some services (particularly among faith-based providers).
- **Grants:** One source of private funding comes from wealthy individuals, faith-based organizations, and foundations of all sizes operating in different geographies. Some support individual ECCE providers, while foundations like Echidna Giving, Conrad N. Hilton Foundation, LEGO Foundation, as well as faith-based organizations and others provide much larger scale support.
- **Employer financing:** Employer contributions to childcare can include in-house care, paying for outsourced childcare, or subsidies to help employees access childcare nearby. In many countries, laws require larger employers to provide childcare, but these are often unenforced.⁴³ Notably effective employer financing models include in-house childcare on Rwandan tea plantations, and in India, the Mobile Creche construction company's contribution model, both of which are expanded upon in the Promising Approaches section below.
- **Small loans and other financial products:** Microloans are available to small businesses in many countries, but the ECCE market is not significantly targeted. Smaller and more informal providers may need support to help them access formal loans and become creditworthy. For example, Kaizenvest, with funding from CATALYZE, is exploring debt products to ECD centers in Rwanda and South Africa, building on its experience of private school loans in India.

- **Social impact investment:** In some places, there are impact investors looking at ECCE who are prepared to take on risk and support social innovation. This is often the case with large-scale philanthropic organizations and foundations. A coalition of funders in South Africa is specifically working on early childhood challenges. Equity-based investments in ECCE are more viable in more economically developed markets and at a higher-end price point for ECCE provision.
- **Social impact bonds/results-based financing:** Results-based financing like social impact bonds are used in a limited way in ECCE. The Innovation Fund Impact Bond targets early learning outcomes in South Africa, with investors contributing \$500,000 over three years to support a home visit program for children aged 3 to 5, and repayment subject to the achievement of agreed upon outcomes.
- **Blended financing:** There are many examples in ECCE where blended finance approaches are used. This comes in various forms and can involve different types of external private finance, combining user fees with external contributions, or public and private funds, and can include cross-subsidization where finance from a more lucrative revenue stream is used to fund activities in a less financially viable one.

1.4.3 Recommendations for ECCE regulations and financing through CATALYZE ECCE investments

<p>Utilize the convening power of USAID and the private sector to convene in-country actors around ECCE to ensure greater multisector dialogue and public-private partnership</p>	<p>Support improved provision by identifying where existing regulation is strong but poorly implemented and use it as a catalyst or launch pad</p>	<p>Where formal regulations are lacking, support the development and use of a common core of standards based on those used by existing quality providers</p>
<p>Consider a range of different financing approaches to support a portfolio of diverse approaches with heterogeneous populations, particularly approaches that serve disadvantaged and marginalized populations</p>	<p>Explore different forms of blended finance including public-private partnerships as well as private-private collaborations</p>	



SECTION 2

Country scans

2.1. How countries were selected for country scans

A long list of countries that are recipients of relevant investments from USAID, the World Bank, or other notable investors (e.g., foundations) was drawn up for this review. This list was discussed with USAID CATALYZE, and other stakeholders and 15 countries were selected: seven from Africa, five from Asia, and three from the Latin America and Caribbean region. The list is an example of the countries that could be responsive to ECCE investments from CATALYZE but is not exhaustive. There are other countries not on this shortlist that are also viable options.

Rapid, high-level scans were conducted for each country using three criteria: the state of access to quality ECCE, women's economic empowerment, and the enabling environment for ECCE. In addition, the scan looked at the investor and innovation landscape and potential entry points for catalytic ECCE investments.

2.2 Summary of country scans

The table below gives a high-level summary of the context across each of the triple dividend development outcomes (children's development and education, women's economic empowerment, and job creation), as well as a summary of key ECCE investors and innovations in each country. Annex 1, includes assessments of each country based on these factors and potential entry points for CATALYZE to consider.

Country	Summary of the ECCE and WEE context	ECCE investors and promising approaches
Africa		
<p>South Africa</p>	<p>ECCE provision and child development context</p> <ul style="list-style-type: none"> • 38 percent of preschool children (0 to 4-year-olds) are in care centers with 49 percent cared for at home. • 65 percent of 4 to 5-year-olds not deemed developmentally on track and 25 percent show signs of malnutrition. There is a 20 percent difference between highest and lowest income quintiles.⁴⁴ • 80 percent of ECCE providers are not registered.⁴⁵ • Strong policy support for ECCE with the National Integrated Early Childhood Development Policy (2015) and the National Childcare and Protection Policy (2019). <p>Women’s economic empowerment context</p> <ul style="list-style-type: none"> • South Africa is ranked 20th out of 146 countries in the Global Gender Gap Report 2022 overall, which looks at economic participation and opportunity, educational attainment, health and survival and political empowerment. Within the economic participation and opportunity pillar only South Africa was ranked 92nd.⁴⁶ • Women’s labor force participation is 54 percent (30 percent of women in informal jobs). • Women are entitled to four months of unpaid maternity leave; employers are not obliged to pay wages, but benefits can be claimed during this time.⁴⁷ <p>Economic development context</p> <ul style="list-style-type: none"> • 2021 GDP growth was 4.9 percent⁴⁸ and unemployment estimated at a relatively high 33.6 percent,⁴⁹ indicating a significant need for job creation activities. • A study by Accenture estimated that increasing the number of women in medium-skilled, rather than low-skilled roles could add R319 billion, or \$19.7 billion, to GDP.⁵⁰ 	<ul style="list-style-type: none"> • Wide variety of investors and investment types in the ECCE sector including: • Public funding amounting to R75 billion (\$4.6 billion) goes to ECCE, mostly to primary healthcare and child support grants of \$25/month for low-income households. Only 6.5 percent of this total is spent on early learning, nutrition support, and parenting.⁵¹ This includes a per-child subsidy to ECD centers, with larger subsidies for low-income children. • Social impact investments (investors and investment ecosystem include Standard Bank, LGT Philanthropies, Innovation Edge, and Volta Capital). • Development of debt markets (Kaizenvest, CATALYZE). • Employer subsidy models (Earlybird). • Social franchises (Smart Start). • Large numbers of highly active foundations operating in ECCE, including Elma Foundation, LGT Philanthropies, UBS Optimus, Imaginable Futures, DG Murray Trust, Echidna Giving.

Country	Summary of the ECCE and WEE context	ECCE investors and promising approaches
<p>Rwanda</p>	<p>ECCE provision and child development context</p> <ul style="list-style-type: none"> • An estimated one percent of children under 3-years-old are accessing formal ECCE services and only 13 percent of those aged 3 to 6 access ECCE services.⁵² • 82 percent of children are developmentally on track according to the 2019 Demographic Health Survey.⁵³ • The government’s aim is to have at least one ECD center in each village. • Currently formal centers are high-cost and restricted to Kigali. • A National ECD Policy and Strategic Plan is putting in place a cross-sector National Child Development Agency to lead coordination on ECCE. • Investment was made in parenting with the development of early learning and development standards; parenting education approaches in development supported by UNICEF. <p>Women’s economic empowerment context</p> <ul style="list-style-type: none"> • Rwanda is ranked sixth overall in the Global Gender Gap Report 2022 and 33rd for economic participation and opportunity.⁵⁴ • Women’s labor force participation (84 percent) is now higher than men’s. • Women in formal employment get 12 weeks of maternity leave, but paternity leave is just four days.⁵⁵ <p>Economic development context</p> <ul style="list-style-type: none"> • In 2021, GDP growth was a strong 10.9 percent⁵⁶ and unemployment was estimated at a very low 1.6 percent.⁵⁷ 	<ul style="list-style-type: none"> • The government and UNICEF are investing in parenting skills for home-based care and home visits. • Funders of ECCE activities include UNICEF (small scale childcare provision for market traders) and the Aga Khan Foundation. • Notable investments in ECCE come from key private sector businesses⁵⁸ including 16 tea plantation companies like Nyabihu Tea Company⁵⁹ and the mining sector such as Wolfram Mining and New Bugarama Mining.⁶⁰ • The Surgira Muryango home visit program tracking longitudinal outcomes of family-strengthening approaches has many financial supporters including ELMA Philanthropies, Oak Foundation, Wellspring Advisors, USAID, and the LEGO Foundation. Pilot findings indicated more positive mother-child interactions and health seeking behaviors.⁶¹ • Kaizenvest, through CATALYZE, is developing debt products and quality improvement support to ECD centers.

Country	Summary of the ECCE and WEE context	ECCE investors and promising approaches
<p>Kenya</p>	<p>ECCE provision and child development context</p> <ul style="list-style-type: none"> Kenyan government provides two years of free pre-primary enrollment for students 4 and 5-years old; gross enrollment is 76 percent.⁶² Below this age, there is significant demand for daycare from informal providers—there are at least 2,700 informal providers in Nairobi alone. Profits are small at just \$50 to \$80 per month.⁶³ Outside of Nairobi and other large cities family, friends, and neighbors tend to provide care. Approximately 38 percent of 3 to 4-year-olds in Kenya do not reach their developmental milestones.⁶⁴ <p>Women’s economic empowerment context</p> <ul style="list-style-type: none"> Kenya is 57th overall in the Global Gender Gap Report 2022 and sixth for economic participation and opportunity.⁶⁵ Female labor force participation is 71 percent. Women are entitled to three months of maternity leave with two weeks of full pay and paternity leave.⁶⁶ <p>Economic development context</p> <p>In 2021, GDP growth was a healthy 7.5 percent⁶⁷ and unemployment was estimated at 5.7 percent.⁶⁸</p>	<ul style="list-style-type: none"> Emergence of notable childcare innovators including Kidogo, Uthabiti, and Tiny Totos. Significant presence of private investors and foundations including: LGT Philanthropies, Echidna Giving, Conrad N. Hilton Foundation, Porticus, Aga Khan Foundation (AKF), Imaginable Futures, and Draper Richards Kaplan Foundation. Kenya SDG Partnership Platform, a multi-partner trust fund that builds on existing networks to scale public private partnerships. Social impact bonds were used in areas such as poverty reduction, led by USAID and others. Adolescent health is led by UN agencies with some interest in exploring related areas such as early childhood.

Country	Summary of the ECCE and WEE context	ECCE investors and promising approaches
Tanzania	<p>ECCE provision and child development context</p> <ul style="list-style-type: none"> • One year of pre-primary school is now both free and compulsory (at age 5), but net enrollment remains low at 28 percent, due to patchy provision.⁶⁹ • Formal, private childcare centers exist in main urban areas, but beyond this, care needs, both paid and unpaid, are met informally by families, friends, and neighbors. • No data in UNICEF development status database on what proportion of children are developmentally on track.⁷⁰ • Following a recent surge in interest in ECCE policy, the first national multisectoral ECD program (2021-2026) led by the Ministry of Health, Community Development, Gender, Elderly and Children (MOHCDGEC) was launched.⁷¹ • The government has a positive parenting program “Familia Bora” and is looking at mapping services and working with families in ECD, childcare, and other areas.⁷² <p>Women’s economic empowerment context</p> <ul style="list-style-type: none"> • Tanzania is ranked 64th overall in the Global Gender Gap Report 2022 and 65th for economic participation and opportunity.⁷³ • Female labor participation is an estimated 80 percent. • Women are entitled to 84 days of paid maternity leave, while men are entitled to three days of paid paternity leave.⁷⁴ <p>Economic development context</p> <ul style="list-style-type: none"> • In 2021, GDP growth was 4.3 percent⁷⁵ and unemployment was estimated at just 2.6 percent.⁷⁶ • The World Bank estimates that achieving gender equity in agricultural productivity alone could boost GDP by 0.86 percent.⁷⁷ 	<ul style="list-style-type: none"> • UNICEF supports the government on rolling out the Familia Bora program through financial and technical assistance • The Bill & Melinda Gates Foundation designated Tanzania one of four initial countries for major investment in gender equity through collaborations with institutions like the Tanzania Agricultural Development Bank.⁷⁸ • Wellspring Advisors and Bloomberg Foundation also have gender empowerment investments. • BRAC supported Play Labs. • AKF is also very active and has worked on women owned childcare centers elsewhere.

Country	Summary of the ECCE and WEE context	ECCE investors and promising approaches
<p>Ghana</p>	<p>ECCE provision and child development context</p> <ul style="list-style-type: none"> • Ghana became one of the first countries in the region to provide two years of free and compulsory pre-primary education, for children 4 to 5-years-old. • Net enrollment rates at this level are almost 70 percent nationally and over 90 percent in the capital, Accra.⁷⁹ • Demand for private ECCE is increasing faster than public provision, with the pace of enrollment growth in private kindergartens outpacing public ones. • 68 percent of children are developmentally on track according to Multiple Indicator Cluster Survey (MICS) 2018.⁸⁰ • Government focus in ECCE has been on universal kindergarten and related measure such as the production of early childhood care and development standards in 2018. <p>Women’s economic empowerment context</p> <ul style="list-style-type: none"> • Ghana is 108th overall in the Global Gender Gap Report 2022 and 108th for economic participation and opportunity.⁸¹ • Female labor participation rate is at 70 percent. • There are supportive laws including three months of paid maternity leave and equal pay for equal work, which helped tackle gender discrimination despite challenging social norms. <p>Economic development context</p> <ul style="list-style-type: none"> • In 2021 GDP growth was a healthy 5.4 percent⁸² and unemployment was estimated at 4.7 percent.⁸³ 	<ul style="list-style-type: none"> • Echidna Giving is supporting the WIEGO-backed marketplace cooperatives featured later as a promising approach. • Imaginable futures and ELMA Philanthropies are supporting Lively Minds, who develop community-run ECCE centers.⁸⁴ • Sabre is working on kindergarten workforce development.⁸⁵ Ghana has an active private school market. USAID Ghana is looking to support this in the north through future programming. • Investors in this area include IDP Foundation, who through the Rising School loan and improvement program, collaborate with Ghanaian small loan provider, Sinapi Abi.

Country	Summary of the ECCE and WEE context	ECCE investors and promising approaches
Liberia	<p>ECCE provision and child development context</p> <ul style="list-style-type: none"> • 88 percent of Liberian children are enrolled in an ECCE program one year before primary school. There is significant over enrollment, where older children who should be in higher grade levels are enrolled.⁸⁶ • Most early stimulation is rote teaching. 72 percent of children in observed ECCE centers were over the age of 6, however most could only complete the easiest assessment tasks on a test aimed at 3 to 5-year-olds.⁸⁷ • There is no data in UNICEF development status database on what proportion of children are developmentally on track.⁸⁸ • Liberia’s National Inter-Sectoral Policy on ECD and National Inter-Sectoral Committee on Early Childhood Development has been in place since 2012, but implementation was challenging due to capacity and resource constraints and other government priorities. <p>Women’s economic empowerment context</p> <ul style="list-style-type: none"> • Liberia is 78th overall in the Global Gender Gap Report 2022 and eighth for economic participation and opportunity.⁸⁹ • Female labor force participation is 70 percent. • Women are entitled to three months of paid maternity leave. Fathers are entitled to 5 days unpaid paternity leave. <p>Economic development context</p> <ul style="list-style-type: none"> • In 2021, GDP growth was 4.0 percent⁹⁰ and unemployment was estimated at 4.1 percent⁹¹ 	<ul style="list-style-type: none"> • USAID is investing in early child development measurement tools. • The Open Society Foundation supported ECD in the country for 10 years. • With funding from the Government of Belgium, Netherlands, Nike Foundation, and the World Bank, Liberia grew the • Empowering Adolescent Girls Project, which trains young women to open childcare and early child education centers. • Comic Relief funds We Care, a program focused on family literacy and ECCE. • LGT Philanthropy invested in private alternatives to education, with heavy investment in early childhood education. • Liberia is experiencing stagnation in its job market, the wider economy and in the flow of donor resources into the country.

Country	Summary of the ECCE and WEE context	ECCE investors and promising approaches
Ethiopia	<p>ECCE provision and child development context</p> <ul style="list-style-type: none"> • Access to pre-primary education expanded from five percent in 2010 to 46 percent in 2016.⁹² About three quarters of growth was in pre-primary for 6-year-olds one year before primary school. • Other provisions include child-to-child (C2C) programs run in rural areas and accelerated school readiness (ASR) developed with government support and external funding. • Ethiopia built its first national assessment system for pre-primary education.⁹³ • The quality of provision is low and highly variable. One study found only 30 percent of ECD centers have play and learning materials to support holistic development.⁹⁴ • There is no data in the UNICEF development status database on what proportion of children are developmentally on track.⁹⁵ • Multiyear kindergarten programs run by NGOs and formal private childcare centers are limited to urban areas. • Ethiopia has an active Policy Framework for ECCE and is in the process of developing a multi-sector ECD policy. <p>Women’s economic empowerment context</p> <ul style="list-style-type: none"> • Ethiopia is ranked 74th overall in the Global Gender Gap Report 2022 and 112th for economic participation and opportunity.⁹⁶ • Female labor participation is 76 percent. • Women are entitled to 120 working days of paid maternity leave. There is no paternity leave. <p>Economic development context</p> <ul style="list-style-type: none"> • In 2021, GDP growth was a healthy 5.6 percent⁹⁷ and unemployment was estimated at 3.7 percent.⁹⁸ • Current conflict and unrest made the environment for ECCE in many locations much more challenging. 	<ul style="list-style-type: none"> • USAID and LEGO Foundation developed a \$25 million public-private partnership to support ECCE projects for children aged 3 to 6-years in crisis and conflict affected locations.⁹⁹ • UNICEF works closely with LEGO Foundation to fund UNICEF’s pre primary work. • Big Win Philanthropy and Bernard Van Leer Foundation are supporting the Children: Future Hope of Addis Ababa program aiming to provide ECCE services to 330,000 low-income households in collaboration with the City of Addis Ababa. The Education Outcomes Fund is also looking to develop a results based financing mechanism for this program.¹⁰⁰ • There is results-based ECD finance in the World Bank and Global Partnership for Education (GPE) funding package.¹⁰¹

Country	Summary of the ECCE and WEE context	ECCE investors and promising approaches
LAC Region		
<p>Honduras</p>	<p>ECCE provision and child development context</p> <ul style="list-style-type: none"> • Only 36 percent of children are enrolled in pre-primary education.¹⁰² • 60 percent of those in low-income areas have no access to ECCE and most attend informal community-based centers. • The childcare sector relies heavily on domestic workers for childcare. • 75 percent of children are developmentally on track according to MICS 2019.¹⁰³ • The World Bank and Global Partnership for Education (GPE) are financing a \$39.5 million Early Childhood Education (ECE) Improvement Project, which aims to build the Ministry of Education’s institutional capacity to manage ECE, improve teaching practices of the ECE workforce and the physical learning environments in targeted areas of the country.¹⁰⁴ • The World Bank Invest in Childcare Initiative is facilitating a systemic mapping of childcare and ECCE activities for a fuller picture of the context.¹⁰⁵ <p>Women’s economic empowerment context</p> <ul style="list-style-type: none"> • Honduras is ranked 82nd overall in the Global Gender Gap Report 2022 and 96th for economic participation and opportunity.¹⁰⁶ • Female labor participation is 54 percent. • Almost one quarter (23 percent) of children are raised by single mothers. Eighty percent of mothers are under 21 when they have their first child. • Some family-friendly policies are in place including maternity leave, which is available for ten weeks at full pay. Employers of 20 women or more must also provide feeding space for children under 3-years of age and a space where employees can leave their children during working hours.¹⁰⁷ <p>Economic development context</p> <ul style="list-style-type: none"> • In 2021, GDP growth was a strong 12.5 percent.¹⁰⁸ Unemployment was relatively high at 8.5 percent.¹⁰⁹ • There is an estimated productivity loss of 16.8 percent from women staying out of the workforce, the highest in LAC.¹¹⁰ 	<ul style="list-style-type: none"> • There is a potential Inter American Development Bank (IDB) loan for ECCE in the pipeline. Details are not yet available. • Trade bodies and unions in the important textile industry are cooperating to develop community childcare pilots for workers. • UNICEF is also active in ECCE. • Investors in women’s economic empowerment projects include the Women and Girls Empowered Consortium (WAGE), Grameen Foundation, Kiva, and Mastercard Foundation.

Country	Summary of the ECCE and WEE context	ECCE investors and promising approaches
Paraguay	<p>ECCE provision and child development context</p> <ul style="list-style-type: none"> Approximately 50 percent of children access pre-primary education. Paraguay has a good net pre-school enrollment rate, though opportunities for children from low-income families to attend are more limited.¹¹¹ The government formed the National Commission for Early Childhood and adopted a cross-sector National Plan for Holistic ECD for 2010-2020. A childcare policy is being designed by an inter-institutional roundtable group.¹¹² 82 percent of children are developmentally on track, according to MICS 2016.¹¹³ <p>Women’s economic empowerment context</p> <ul style="list-style-type: none"> Paraguay is ranked 80th overall in the Global Gender Gap Report 2022 and 78th for economic participation and opportunity.¹¹⁴ Female labor participation is at 63 percent. High rates of domestic violence and absent fathers (35 percent) place additional strain on childcare.¹¹⁵ Paraguay offers 18 weeks of paid maternity leave and two weeks of paid paternity leave. Government efforts include the Public Policy Law for Rural Women, which provide women with access to credit and training to start or grow businesses, particularly in agriculture. <p>Economic development context</p> <ul style="list-style-type: none"> In 2021, GDP growth was 4.2 percent¹¹⁶ and unemployment was estimated at 7.2 percent.¹¹⁷ There is an estimated productivity loss of 6.7 percent as a result of women staying out of the workforce.¹¹⁸ 	<ul style="list-style-type: none"> IDB executed a loan in the health sector with an integrated approach to early health and childhood development. LEGO Foundation and UNICEF collaborate with the government on a childcare initiative.¹¹⁹ There are many investors in local women’s economic empowerment, including Fundacion Paraguaya, IDB, Grameen Foundation, and others.

Country	Summary of the ECCE and WEE context	ECCE investors and promising approaches
Colombia	<p>ECCE provision and child development context</p> <ul style="list-style-type: none"> In 2019, 84 percent of 3 to 5-year-olds were enrolled in ECCE programs.¹²⁰ Other estimates now place that over 90 percent.¹²¹ The Hogares Comunitarios de Bienestar (HCB) program expanded ECCE provision to 800,000 low-income families using public funds and providing subsidized child care, nutritional support, and parenting help (See HCB model in Section 3).¹²² ECCE provision to Venezuelan migrants is available largely through civil society support, including Plan's mobile child protection service and ECCE support from Norwegian Refugee Council (NRC) and the LEGO Foundation during the pandemic. The National Development Plan of 2014 furthered ECCE goals by formalizing ECCE for 0 to 5-year-olds into the first cycle of the education system and defining standards for these services with additional clarity on their financing and monitoring.¹²³ There is no data in the UNICEF development status database on the percentage of children who are developmentally on track.¹²⁴ The Inter-sectorial Commission for the Comprehensive Care of Early Childhood includes eight ministries, agencies, and departments, each responsible for overseeing ECCE sector governance, resulting in a conducive policy environment. According to the World Bank's SABER analysis, Colombia's current policies provide a strong legal framework that is supportive of children, women, and families.¹²⁵ <p>Women's economic empowerment context</p> <ul style="list-style-type: none"> Colombia is ranked 75th overall in the Global Gender Gap Report 2022 and 93rd for economic participation and opportunity.¹²⁶ Female labor participation is 62 percent. The country adopted a national roadmap towards gender equality in 2013 and created a national multi-sector coordination mechanism to support its implementation.¹²⁷ Tax breaks are available for organizations that hire survivors of gender-based violence. <p>Economic development context</p> <ul style="list-style-type: none"> In 2021, GDP growth was a strong 10.6 percent¹²⁸ and unemployment was estimated at a relatively high 14.3 percent.¹²⁹ Estimated productivity loss resulting from women staying out of the workforce is 5.7 percent.¹³⁰ 	<ul style="list-style-type: none"> There is substantial public subsidization of childcare for lower income households through the HCB program. LEGO Foundation partnered with Colombian social enterprise aeioTU to support provision of ECCE to 11,000 children and 750 educators in rural areas.¹³¹ Globally, Colombia is a site of innovation in the development of results based finance and is home to Instiglio,¹³² as well as an IDB Innovation Lab focused on learning from results-based finance.

Country	Summary of the ECCE and WEE context	ECCE investors and promising approaches
Asia		
India	<p>ECCE provision and child development context</p> <ul style="list-style-type: none"> ASER found that 71 percent of 3-year-olds, 85 percent of 4-year-olds, 92 percent of 5-year-olds, and 96 percent of 6-year-olds attend either pre-school or school with significant variation by state (44 to 87 percent) and income quintile (65 to 80 percent).¹³³ Over half of the children in the lowest income quintile attend government Integrated Child Development Services (ICDS) <i>anganwadi</i> centers, which serve over 100 million children. There is no data in the UNICEF development status database on what proportion of children are developmentally on track.¹³⁴ BlinC Invest estimates there are 216 million children under 8-years of age in India and forecasts the ECCE market potential at \$9.5 billion.¹³⁵ There are high-end ECD center chains with significant private capital investments. The 2020 National Education Policy states ECE starts at 3-years of age. There are curricula and quality standards in place, but many are not well implemented. <p>Women’s economic empowerment context</p> <ul style="list-style-type: none"> India is ranked 135th out of 146 countries overall in the Global Gender Gap Report 2022 and 143rd for economic participation and opportunity.¹³⁶ Female labor participation stands at only 22 percent, but rates of unpaid work are much higher. Women are entitled to six months of paid maternity leave for their first two children and 12 weeks after that. There is no paternity law.¹³⁷ <p>Economic development context</p> <ul style="list-style-type: none"> In 2021, GDP growth was a healthy 8.9 percent¹³⁸ and unemployment was estimated at 6.0 percent.¹³⁹ The IMF estimates that if there were gender equality in labor force participation, there would be a 27 percent national increase in GDP.¹⁴⁰ 	<ul style="list-style-type: none"> There are a huge variety of investors and approaches in India, reflective of a relatively mature market able to absorb and sustain more complex or innovative financing. Public finance is provided through the ICDS/<i>anganwadi</i> system for those with the lowest income. Innovative models include cooperatives (self-employed women’s associations or SEWAs) and collaborations with private business (Mobile Creches). Many of these models are backed by a significant number of foundations interested in India, including Echidna, LGT Philanthropies, Porticus, UBS Optimus, Aga Khan Foundation, Imaginable Futures, Bernard Van Leer, and FSE India. There is already an important private education finance industry, which works with affordable private K-12 schools. There are also childcare and early education chains such as Klay Schools, some with equity backing.

Country	Summary of the ECCE and WEE context	ECCE investors and promising approaches
Nepal	<p>ECCE provision and child development context</p> <ul style="list-style-type: none"> • Fifty-one percent of 3 to 5-year-olds attended some kind of ECCE program in 2016. (This percentage was as low as 30 percent for 3-year-olds, but increases with age.¹⁴¹) • There are significant differences in enrollment based on income, mothers' education level, and geography, with the western half of the country having a much lower enrollment rate. • Only 65 percent of children are developmentally on track according to MICS (Multiple Indicator Cluster Surveys) 2019.¹⁴² • There was a focus on education rather than multi-sectoral ECD, because ECE is overseen by the Ministry of Education where cross-sectoral coordination is weak. <p>Women's economic empowerment context</p> <ul style="list-style-type: none"> • Nepal is ranked 96th overall in the Global Gender Gap Report 2022 and 98th for economic participation and opportunity.¹⁴³ • Female labor participation is high at 85 percent. • The law allows for 7.5 weeks of maternity leave and 15 days of paternity leave. It also allows for paid breastfeeding breaks at work.¹⁴⁴ • One-third of households are headed by a woman. <p>Economic development context</p> <ul style="list-style-type: none"> • In 2021 GDP growth was 4.2 percent¹⁴⁵ and unemployment was estimated at 5.1 percent.¹⁴⁶ 	<ul style="list-style-type: none"> • To support better nutrition, the Government of Nepal pays a child grant for children under 5 in low income districts (40 percent of the population).¹⁴⁷ • International donors, NGOs, and foundations are the main investors in Nepal. Save the Children and UNICEF are particularly prominent and work with local organizations such as Seto Gurans, which provides ECD and parenting support.¹⁴⁸

Country	Summary of the ECCE and WEE context	ECCE investors and promising approaches
<p>Pakistan</p>	<p>ECCE provision and child development context</p> <ul style="list-style-type: none"> • The Annual Status of Education Report (ASER) indicated in 2019 that an average 61 percent of 3 to 5-year-olds in Pakistan are not accessing ECCE. This increases to 92 percent for 3-year-olds and drops to 34 percent for 5-year-olds.¹⁴⁹ • Of those that are in centers, 44 percent are in government centers and 56 percent are in private ones. Informal home-based childcare centers are common but are unregistered and unlicensed.¹⁵⁰ • Cost is a major barrier although the Government of Sindh opened a limited number of low-cost childcare centers charging users two to 3,000 Pakistani rupees (\$8-13) per month. • The government largely focuses on formal education and does not prioritize formal care of children under 5. • There is no data in the UNICEF development status database on what proportion of children are developmentally on track.¹⁵¹ <p>Women’s economic empowerment context</p> <ul style="list-style-type: none"> • Pakistan is ranked 145th overall out of 146 countries in the Global Gender Gap Report 2022 and 145th for economic participation and opportunity.¹⁵² • Female labor force participation is exceptionally low at 23 percent, but women perform more than 90 percent of unpaid work. • The absence of childcare is cited as a major factor in women’s low labor force participation, but social and gender norms, safe transport, and flexible hours are also major barriers. • Women are entitled to three months of paid maternity leave and fathers are eligible for one month of leave.¹⁵³ <p>Economic development context</p> <ul style="list-style-type: none"> • In 2021, GDP growth was 6.0 percent¹⁵⁴ and unemployment was estimated at 4.4 percent.¹⁵⁵ 	<ul style="list-style-type: none"> • Provincial regulations mandate childcare for employees of certain businesses, but only 27 percent of these offer it. Compliance is higher in certain sectors like textiles.¹⁵⁶ • FCDO supported non-state investment in ECD through the ILM Ideas2 program (see Parwaan approach for more details). • Additional support came from NGOs including Aga Khan, Rupani Foundation, and international funders like GIZ and the EC. • Rupani Foundation has various approaches including “informed parents,” and ECD on Wheels supporting marginalized communities in city suburbs.

Country	Summary of the ECCE and WEE context	ECCE investors and promising approaches
<p>Bangladesh</p>	<p>ECCE provision and child development context</p> <ul style="list-style-type: none"> • The World Bank estimated Bangladesh’s overall ECCE attendance rate at just 13 percent for 3 to 5-year-olds.¹⁵⁷ • NGOs, like BRAC, play a large role in ECCE provision in Bangladesh, but other providers are growing with over 90 percent of non-NGO centers being established between in the last decade. • The average monthly fee in NGO-run childcare centers is \$16 for an eight-hour day, compared to \$93 at a private center for an 11-hour day.¹⁵⁸ • The government is expanding ECCE investment with the Ministry of Women and Children Affairs (MOWCA) setting up 8,000 childcare centers in 16 districts in Bangladesh.¹⁵⁹ • In 2021, the Daycare Center Act was passed requiring registration and adherence to standards and regulations. • 75 percent of children are developmentally on track according to the MICS 2019.¹⁶⁰ • The influential Bangladesh ECD Network brings together government and civil society actors to help develop and advocate for ECCE policies. • ECCE is provided to Rohingya Refugees in Cox’s Bazar. It is typically donor-funded and implemented by NGOs like VSO, Plan, or Save the Children, in collaboration with local government and partners. <p>Women’s economic empowerment context</p> <ul style="list-style-type: none"> • Bangladesh is ranked 71st overall out of 146 countries in the Global Gender Gap Report 2022 and 141st for economic participation and opportunity.¹⁶¹ • Female labor participation is at 39 percent, however women in low income areas of the capital, Dhaka, spend over five hours a day on unpaid work, compared to 0.3 hours that men spend on unpaid work.¹⁶² • Maternity leave is 16 weeks and is split pre- and post- birth. Men have not had any paid paternity leave but this is under review and central government now provides 15 days paternity leave. <p>Economic development context</p> <ul style="list-style-type: none"> • In 2021, GDP growth was 6.9 percent¹⁶³ and unemployment was estimated at 5.2 percent.¹⁶⁴ 	<ul style="list-style-type: none"> • BRAC is a major player in early childhood and implemented 110 community-led and 400 government-run Play Labs with funding from LEGO Foundation and Porticus. This model was also exported internationally. • UNICEF is also active with programs such as Mothers@ Work, and through its support of better breastfeeding policies and practices. • Upscale private operators include Wee Learn and Bromley Bee, who provide companies with in-house childcare as part of their offering. • Pulki offers childcare opportunities to more disadvantaged families and 95 percent of its employees are young women. They also provide training and in-house childcare to corporations. • The Bangladesh Labor Act requires businesses with more than 40 female employees to offer childcare options for children under the age of six years, although only 23 percent of employers surveyed by the IFC met this requirement

Country	Summary of the ECCE and WEE context	ECCE investors and promising approaches
MIDDLE EAST/NORTH AFRICA		
<p>Jordan</p>	<p>ECCE provision and child development context</p> <ul style="list-style-type: none"> • A 2015 survey of Jordanian mothers found only two percent of children aged 3 to 48-months were enrolled in center-based ECCE provision. In 2012, 22 percent of 4-year-olds were enrolled and 47 percent of 5-year-olds were enrolled.¹⁶⁵ • Over 80 percent of ECCE provision for 4 to 6-year-olds is private, with 39 percent of the wealthiest quintile attending ECCE, compared to just 11 percent of the poorest.¹⁶⁶ • Over half of registered nurseries were based in schools largely for children of the mostly female teaching staff at these schools. • Of those not enrolling children, 73 percent indicated that ECCE was not necessary because mothers were homemakers.¹⁶⁷ • 71 percent of children are developmentally on track according to the 2018 Demographic Health Survey.¹⁶⁸ • Jordan’s Human Resource Development Strategy for 2016-2025 targets universal early learning opportunities, but the priority is expanding and improving the quality of kindergarten. • There is an exceptionally large refugee population in Jordan, mainly from Syria. Many attend informal, NGO-run ECCE centers. <p>Women’s economic empowerment context</p> <ul style="list-style-type: none"> • Jordan is ranked 122nd overall in the Global Gender Gap Report 2022 and 125th for economic participation and opportunity.¹⁶⁹ • Female labor participation is just 16 percent. • Women are entitled to ten weeks of maternity leave with full pay and employers with at least 20 married women employees must provide a staffed care facility.¹⁷⁰ Since 2019, men are entitled to 3 days paid paternity leave. <p>Economic development context</p> <ul style="list-style-type: none"> • In 2021, GDP growth was just 2.2 percent¹⁷¹ and unemployment was estimated at a remarkably high 19.3 percent.¹⁷² 	<ul style="list-style-type: none"> • Queen Rania Teacher Academy supports teachers and refugees and the Queen Rania Foundation conducted a cost-benefit analysis of ECCE investment. • The IFC/World Bank Mashreq Gender Facility is leading an ECCE market assessment to explore ways to expand childcare in collaboration with the government. • LEGO Foundation and UNICEF are collaborating on learning through play, targeting vulnerable districts, and Syrian refugees. • The Moving Minds Alliance works in Jordan (and other locations) to try and drive better coordination to support young children affected by crisis and displacement.



SECTION 3

Promising approaches to ECCE and WEE

3.1 Selection of promising approaches

The country scans demonstrate promising approaches to ECCE and WEE to learn from, scale up to reach more children, replicate elsewhere, or further develop to increase their effectiveness. These promising approaches serve as examples of potential entry points for CATALYZE ECCE and other investors.

Promising approaches that meet one or more of the following criteria are featured in Section 3:

1. Increase access to quality care for families, particularly for those that are disadvantaged;
2. Support the healthy, holistic learning and development of young children who receive care, particularly for those that are disadvantaged;
3. Enhance skills and empower ECCE workforce, particularly women;
4. Increase gender equality and women's economic empowerment through wage employment, entrepreneurship, professional development, or other means; and
5. Use innovative or blended financial models that leverage new or additional funding from the public or private sector (including philanthropic funding).

These approaches are not an exhaustive list of all promising ECCE models, but are examples of how ECCE provision is expanding and evolving. Further, the approaches were also selected to illustrate the wide variety of models available.

3.2 Summary of promising approaches

Name	Approach and outcomes	Financing model
Community-run ECCE provision examples		
<p>Makola Market Childcare, Ghana</p>	<p>Approach and governance</p> <ul style="list-style-type: none"> • Childcare for informal market workers at their place of work, Ghana’s biggest outdoor market, catering to 140 children. • Community-based model run by a parent-teacher association including representatives of Ghana Association of Traders. • Officially open from 8 am to 1 pm, unofficially open from 6 am to 6 pm to accommodate market traders’ working hours.¹⁷³ • Center manager is a trained teacher; others are not. • Uses government-approved curriculum in English and Akan languages and provides a healthy lunch. • Quality and advocacy support from the international organization Women in Informal Employment Globalizing and Organizing (WIEGO), who use the center to campaign for greater childcare support for women in the informal economy by advocating for similar childcare centers in other markets. <p>Outcomes and evidence of impact</p> <ul style="list-style-type: none"> • Positive evidence of reduced stress and anxiety, increased income, and greater productivity among women with children receiving care. • Earnings increased, working hours are less disrupted, and productivity is higher as traders and/or customers are not distracted by children.¹⁷⁴ • No evidence available on the impact of provision on child development and learning. 	<ul style="list-style-type: none"> • Rooms provided for the center in the market, initially as in-kind support, by Ghana’s First Lady. • A flexible user-fee payment system is in place.¹⁷⁵ Some parents can pay all costs. Others pay a contribution and the Ghana Association of Traders covers the rest.¹⁷⁶ For some, free spots are available. • Campaigning with Women in Informal Employment Globalizing and Organizing (WIEGO) for market modernization plans to include a renovated childcare center.

Name	Approach and outcomes	Financing model
<p>Self Employed Women’s Association (SEWA), Sangini Childcare, India</p>	<p>Approach and governance</p> <ul style="list-style-type: none"> • Sangini Childcare Workers’ Cooperative runs 13 childcare centers in Gujarat state, providing care to 350 to 400 children aged 0 to 6-years.¹⁷⁷ 33 percent are under 2-years-old. • Provides access to quality ECCE for informal workers’ children and is open from 9 am to 5 pm, which is much longer than the government’s <i>anganwadi</i> center. • Centers adopt an integrated approach to childcare including providing two nutritious meals (29 percent of children in Gujarat are malnourished¹⁷⁸), basic health services, and education. • Childcare workers receive continuous training from a SEWA training institute financed in part by other SEWA cooperatives. • The centers serve as a public service access point for vaccinations, primary health care, and nutritional advice for parents. SEWA also acts as a community monitoring agent for local <i>anganwadi</i> centers. <p>Outcomes and evidence of impact</p> <ul style="list-style-type: none"> • 64 percent of women using SEWA were able to increase their working hours and saw incomes increase 143 percent after enrolling their children. Stress was also reduced for 98 percent of women.¹⁷⁹ • No external learning assessment is available, but mothers report 96 percent of children aged 3 to 6-years at Sangini know the alphabet and can count. 70 percent say their children now talk more, 64 percent say their nutrition improved, and 97 percent say their children are up to date with vaccinations.¹⁸⁰ 	<ul style="list-style-type: none"> • Costs of a typical center include two facilitators, rent, supplies (food and medicine), supervision, and administration costs. • Parents pay 175 rupees per month (\$2) in fees, but this only covers approximately 10-15 percent of costs.¹⁸¹ • The cooperative depends on revenue from other SEWA cooperative structures, donor funds and public subsidies. • Cooperative shareholders are the childcare workers and mothers whose children attend the centers. • SEWA is a trade union of informal women workers that developed over 106 cooperatives in various sectors, including Sangini in the childcare sector.

Name	Approach and outcomes	Financing model
Social franchise examples		
<p>Kidogo, Kenya</p>	<p>Approach and governance</p> <ul style="list-style-type: none"> • Kidogo is a social enterprise that provides quality childcare and livelihoods for vulnerable women in Nairobi’s urban slums. Over 500 centers now exist under the Kidogo brand. • Maps existing child care providers to find potential “mamapreneurs” and invests in them. • Six-month accelerator program to learn the “Kidogo Way” on how to provide quality holistic care based on key principles of safety, caregiving, nutrition, learning and parenting. • Kidogo sees a lack of business skills as a barrier to women’s success in daycare, and provides potential providers with tools and training in managing cash flow and costs, collecting payments, and other areas of business management. • When an operator achieves a “green” competency mark in core areas, they can become a Kidogo franchisee and receive branded signs, \$250 for renovations, and a Kidogo franchisee starter kit. Ongoing support is also provided. <p>Outcomes and evidence of impact</p> <ul style="list-style-type: none"> • Within one year, there was a 32 percent reduction in waste and a 23 percent reduction in stunting in children at Kidogo centers.¹⁸² • 80 percent of children at Kidogo centers are developmentally on track. In comparison to a control group, they completed certain tasks better than other children when graduating to primary school, particularly in the areas of executive function and emotional regulation.¹⁸³ 	<ul style="list-style-type: none"> • Largely grant-funded from organizations including Grand Challenges Canada, Pearson, and Echoing Green. • To participate in the accelerator, “mamapreneurs” pay a nominal fee of \$5 per month. This gives them access to tools, training, and a peer community. • Kidogo childcare centers cost parents less than \$1 per day. (15 to 20 percent of a typical household income).¹⁸⁴ • It costs Kidogo approximately \$10 per month to provide each center with quality assurance and refresher training.

Name	Approach and outcomes	Financing model
Smart Start, South Africa	<p>Approach and governance</p> <ul style="list-style-type: none"> SmartStart is a social franchise program to deliver playgroups, childcare and ECD services through a scalable model of training, curriculum, materials, and monitoring. By 2021, they had supported over 5,000 unemployed men and women to run their own SmartStart programs. Key features of the program are nurture, talk, play, stories, and parent involvement. They have a distributed management structure involving a central hub and a series of franchisors (often ECD organizations) who oversee a group of franchisees. Franchisees receive initial training to set up their centers and regular, additional training to improve quality as well as regular quality assurance and licensing visits. Three models provide different types of childcare: a two-day playgroup, a 25-hour childcare program, and a full-time classroom-based ECD center. <p>Outcomes and evidence of impact</p> <ul style="list-style-type: none"> In 2021, SmartStart provided care for 38,751 children. 70 percent of franchisees are new to running childcare centers and significant job creation has resulted.¹⁸⁵ An independent evaluation showed that 62 percent of learners achieved the expected standard for their age within six months; compared to 32 percent who are at baseline.¹⁸⁶ 	<ul style="list-style-type: none"> Smart Start received funding from impact investors like the Global Innovation Fund and foundations including LGT Venture Philanthropies and DG Murray Trust. Fees for participating families at centers are modest, ranging from 50 to 400 South African rand (\$3-\$25) a month depending on location.¹⁸⁷ In year one, centers receive a grant in addition to fees. After that, SmartStart helps them apply for government ECD subsidies. The organization estimates that a fully funded social franchise reaching one million children per year would cost \$168 million a year.¹⁸⁸

Name	Approach and outcomes	Financing model
<p>Parwaan, Children's Global Network-Pakistan</p>	<p>Approach and governance</p> <ul style="list-style-type: none"> • The Parwaan model was developed by Children's Global Network-Pakistan. • It targets unemployed youth as potential business owners through an intensive eight-week process. • Trainees were 60 percent unemployed and 69 percent female.¹⁸⁹ • Provides a model to support school readiness for children aged 3 to 5-years through the provision of pre-school education • Service is provided only four hours per day and more focused on school preparation than full-day childcare. <p>Outcomes and evidence of impact</p> <ul style="list-style-type: none"> • 25,000 children attended 2,000 centers in the Balochistan, Islamabad Capital Territory, Khyber Pakhtunkhwa, Punjab and Sindh provinces. • Learning evaluations using the International Development and Early Learning Assessment (IDELA) tool showed improvements across all domains and that children from these centers performed more effectively in grade one than peers. 92 percent of parents were satisfied with the quality of the program. • 74 percent of centers were sustained and 81 percent were profitable.¹⁹⁰ 	<ul style="list-style-type: none"> • Preschool entrepreneurs charged parents a fee for children's attendance, based on market rates. More than 50 percent paid less than 500 Pakistani rupees (PKR) (\$2) a month.¹⁹¹ • This generated a modest income for young people, PKR 5,000 to 15,000 per month (\$23-67), who would otherwise be unemployed and without an income.¹⁹² • Children's Global Network Pakistan's plan was to become sustainable by generating revenue from selling training and resources to entrepreneurs. However, Sales targets were not met because not enough people were prepared to invest money at prices needed for profitability (\$80 per teacher and \$110 for materials). Additional FCDO Innovation Fund capital was therefore required to pay for training.

Name	Approach and outcomes	Financing model
<p>Tiny Totos, Kenya</p>	<p>Approach and governance</p> <ul style="list-style-type: none"> • Social franchise model works with informal childcare providers in Nairobi’s slums (they are looking to expand beyond Nairobi soon) to develop them as profitable childcare entrepreneurs. • Operates a network of 130 childcare providers serving 13,000 children. • Business model consists of training, peer networks, and investment and is designed to improve quality, create business sustainability, and provide better care to children. • Supports childcare businesses to generate new revenue streams such as meals, books, and koko stoves. Meals are particularly important as they support nutrition and increase revenue. Centers with kitchens have a 69 percent revenue increase. Although revenues increased, profits are unknown.¹⁹³ • Tech-based reporting systems introduced. <p>Outcomes and evidence of impact</p> <ul style="list-style-type: none"> • Over 3,000 women provided with improved childcare, nutrition, and business management skills. • More than \$22,000 in microloans issued to the network, with three percent of business loans in arrears.¹⁹⁴ • Evidence that 93 percent of children in the network have no developmental delay and 73 percent of children show no signs of malnutrition.¹⁹⁵ 	<ul style="list-style-type: none"> • All businesses pay a modest monthly partnership fee (\$5) and must meet their own core operating costs.¹⁹⁶ • Some training programs require additional payments of \$5 to \$20. • Funding from foundations, including Draper Richards Kaplan Foundation. • Tiny Totos also collaborated with private-sector firms to establish childcare centers for employees close to their factories. The collaboration’s finances are unclear.¹⁹⁷

Name	Approach and outcomes	Financing model
Employer collaboration		
Mobile Creches, India	<p>Approach and governance</p> <ul style="list-style-type: none"> • Community-led childcare centers established at construction sites and slum settlements for children of migrant laborers. In 2020-21 there were 68 centers (down from 78 the year before). 13,521 children were reached, 4,863 directly by Mobile Creches, 4,089 through partner NGOs and 4,569 through COVID relief response efforts, • Provides care specifically for migrant women engaged in low-paid, informal work and operates in-house training for local women to become care workers. These trained local women constitute 40 percent of the workforce. • Mobile Creches follow families of migrant laborers from one construction site to the next. • Partnerships with construction companies address hard to reach children that public childcare provision does not reach. • Provides eight-hours-a-day, six-days-a-week programs that include nutrition, hygiene, vaccination, and early stimulation for children aged 0 to 3, 3 to 5, and 6 and above year-olds. • Mobile Creches is responsible for identifying staff or a local service provider and to support them to use Mobile Creches' approach and materials. <p>Outcomes and evidence of impact</p> <ul style="list-style-type: none"> • Mobile Creches reached 867,000 children by establishing 1,000 childcare centers and training 6,500 women as childcare workers. • A qualitative study by Boston Medical College found that the sites provide safety and helped to nurture child development and nutrition.¹⁹⁸ • An evaluation on accelerating learning found that age appropriate curricula, play-based methods, and teacher training were central to a “successful intervention with a highly mobile group of children”. Learning outcome data, however, was unavailable.¹⁹⁹ 	<ul style="list-style-type: none"> • At each location, the construction company takes full responsibility for managing and financing the creche. • Average operating costs are approximately \$20 per month per child, or about \$12,000 per year for a center with 50 children. Getting construction companies to pay this can be a challenge.²⁰⁰ • Mobile Creches is responsible for ensuring quality by identifying and training suitable center operators. • In 2017-2018, Mobile Creches' income was \$1.1 million. • Institutional donors accounted for 45 percent of this, with more than half from Indian sources. Local and foreign grants and interest on investments and savings also contributed to income.

Name	Approach and outcomes	Financing model
Earlybird, South Africa	<p>Approach and governance</p> <ul style="list-style-type: none"> • Offers childcare “Nest” centers for high-income corporate clients’ employees, “Flock” centers in high-end property developments and “Blue Door” centers in low-income neighborhoods. • All centers have qualified teaching staff and programs that provide upfront training and ongoing support from mentors. • Integrated approach to child development including vaccination, nutrition, and special needs support. • Two-generation (e.g., parent-child) approaches consider physical and mental health of children and caregivers, and how they interrelate. <p>Outcomes and evidence of impact</p> <ul style="list-style-type: none"> • In low-income communities, the initiative enables women to have access to more employment options without having to take/care for their children. In the corporate environment, provision of care through Earlybird helped increase women’s opportunities for promotion to more senior positions. • Learning outcomes are tracked using the Early Learning Outcome Measure, but no data has been released publicly. 	<ul style="list-style-type: none"> • Revenues from corporate Earlybird centers (e.g., Siemens and ABSA) subsidize social franchisees that run “Blue Door” centers in neighborhoods with limited access to high-quality ECCE. • Fees for Nest and Flock centers are about \$200 per month, plus registration of \$115 and an annual equipment charge of \$65.²⁰¹ In comparison, fees at Blue Door centers are \$18 to \$25 a month.²⁰² • Partnering with infrastructure providers (social housing developers and innovative organizations like the Bright Kid Foundation) ensures that the cost of building/installing centers does not fall on families requiring services. • Proof of concept was funded by Innovation Edge (ECD social impact investor), who is also contributing additional funds to scale up the model.

Name	Approach and outcomes	Financing model
Home-based care improvement		
Uthabiti, Kenya	<p>Approach and governance</p> <ul style="list-style-type: none"> • Provides services to women-led childcare microenterprises and home-based childcare centers in Nairobi and Kisumu. • Improves the quality of early childhood education provisions by delivering capacity development services via largely women-led childcare enterprises. • Support of quality improvement of childcare providers includes staff training, establishing learning networks, assistance with center design, access to affordable, relevant play and learning materials, and to affordable resources for health and hygiene. • Provides business services including banking, money transfers, loans, insurance, and business development support. • Provides guidance to communities and caregivers on how to measure developmental progress for children aged 0 to 3-years. • Built a network of providers to help create a sustainable ecosystem for ECCE and is active in the wider policy arena. <p>Outcomes and evidence of impact</p> <ul style="list-style-type: none"> • Working to improve 3,012 childcare enterprises, 88 percent of which are women-led.²⁰³ • No data available on impact on child development. 	<ul style="list-style-type: none"> • Uthabiti states it costs \$500 to support improvements to a childcare center.²⁰⁴ • Largely foundation-based funding, including organizations such as Echidna Giving, Conrad N. Hilton Foundation, and Roddenberry Foundation. • Unclear if fees are charged to centers for support provided.

Name	Approach and outcomes	Financing model
<p>One Sky, Vietnam</p>	<p>Approach and governance</p> <ul style="list-style-type: none"> • Provides training for home-based childcare providers so they can deliver quality care. • Supports improvements through training of trainers, onsite mentoring, and hands-on support. Trains cohorts of home-based child caregivers (HBCC) over nine months. • Training includes how to engage parents, including how to produce videos. • Majority of providers are women who have no formal training and are mostly unregulated. • Focused on areas of Vietnam where rural migrants (80 percent are women) move to find factory jobs. <p>Outcomes and evidence of impact</p> <ul style="list-style-type: none"> • Almost 500 home-based care providers will be trained by 2021, impacting over 15,000 children. • The impact evaluation of OneSky's Training Program for Home-Based Care Providers in Vietnam (2020) found improved and sustained home-based childcare quality. This included the physical environment, caregiver-child interactions, inclusiveness, and support for early learning and development. It also found a positive spillover impact on those not directly trained.²⁰⁵ 	<ul style="list-style-type: none"> • Funds core costs through grant funding which comes from private companies and foundations. • Does not charge a fee to access training or ongoing benefits for providers. Training costs are minimized by borrowing public spaces such as kindergartens, with the help of local districts. • OneSky's Home-Based Care Provider Training is backed by the government and is being introduced in 19 Vietnamese provinces over the next several years. The organization views government collaboration as crucial to the sustainable scaling up of support programs for home based childcare in Vietnam.

Name	Approach and outcomes	Financing model
Publicly funded		
<p>Programa Estancias Infantiles (PEI), Mexico</p>	<p>Approach and governance</p> <ul style="list-style-type: none"> • Provides support to low-income women to encourage labor force participation through government subsidies of childcare costs paid to service providers. • Established in 2007 to offer childcare services to working women, single fathers, and guardians in low-income households or those looking for work or studying. In this context, low-income refers to monthly household earnings of less than six times the minimum wage (approximately \$770). • Those earning less than four times the minimum wage received a \$35/month subsidy and those earning four to six times received \$22 per month.²⁰⁶ • PEI also offered a subsidy to women or community groups to set up their own home-based or community childcare service. <p>Outcomes and evidence of impact</p> <ul style="list-style-type: none"> • By the end of 2018 PEI had reached 329,821 children and supported 313,550 parents and guardians through 9,566 home-based and community childcare services. • A qualitative study found that PEI gave women more employment flexibility, led to greater productivity, and allowed women to have more influence over household income.²⁰⁷ 	<ul style="list-style-type: none"> • Government pays subsidies directly to childcare workers (65 percent), and parents are expected to pay the remainder of the fees (35 percent). • PEI was not enacted within a law. In 2019, the government reduced funding to the program, providing a cash transfer to low-income families instead. • Without the subsidy, many centers stopped operating because parents could not afford the full fees.

Name	Approach and outcomes	Financing model
Hogares Comunitarios de Bienestar, Colombia	<p>Approach and governance</p> <ul style="list-style-type: none"> • Home-based, publicly funded care for most vulnerable children identified by the Institute of Family Welfare (ICBF) of Colombia. Provides home-based care, supplementary nutrition, and psychosocial stimulation. • Serves 800,000 low-income children under 6. • Home-based community nurseries are set up in some of the poorest households. • One care worker may have a group of up to 12 or 14 children with a maximum of two aged 6 to 18 months, a maximum of one child with a disability (and in this case, only one child under 2 years of age may also attend). <p>Outcomes and evidence of impact</p> <ul style="list-style-type: none"> • Positive child development outcomes include a two percent reduction in chronic malnutrition.²⁰⁸ • Research shows cognitive development gains of 0.15 to 0.3 standard deviations for children with at least 15 months of exposure to the program.²⁰⁹ • Socio-emotional skills improved 0.12 to 0.3 standard deviations for children older than 3-years after at least 15 months of program exposure.²¹⁰ 	<ul style="list-style-type: none"> • Public financing, support, and supervision by the ICBF. • Funding was raised primarily through a payroll tax, first 2 percent and then 3 percent. This covered 85 percent of the costs. Parents pay half of the caregiver stipend.²¹¹

Name	Approach and outcomes	Financing model
Civil Society-run chain		
<p>BRAC Play Labs, Bangladesh</p>	<p>Approach and governance</p> <ul style="list-style-type: none"> • BRAC's Play Labs are play-based learning centers for children aged 3 to 5-years in low resource settings in Bangladesh, Uganda, and Tanzania. • BRAC created 110 community-based Play Labs in Bangladesh, 400 in government primary schools, and a network for Humanitarian Play Labs serving children affected by the Rohingya refugee crisis in the city of Cox's Bazaar. • Research by University of Cambridge and Columbia University found that Play Lab children outperformed control group children at a moderate level in year one, and more dramatically in year two.²¹² • More than 40,000 Rohingya children have been supported in 250 BRAC Play Labs since 2017. Play Lab spaces in this context are designed around memories of home for the children: motifs and art significant in Rohingya culture. <p>Outcomes and evidence of impact</p> <ul style="list-style-type: none"> • Since 2015, over 115,000 children were reached through the Play Lab model in Bangladesh, Tanzania, and Uganda. • BRAC trained 315 adolescent girls and young women to work as facilitators or Play Leaders in community based Play Labs. • A two-year study shows Play Labs significantly improved child development outcomes on the Ages and Stages Questionnaire (ASQ3) as well as on the WPPSI Verbal IQ score.²¹³ 	<ul style="list-style-type: none"> • Financed largely from grants and donations. In 2016, BRAC received \$7.2 million over five years from LEGO Foundation to promote Play Labs. • In Bangladesh, parents are asked to make a small contribution to have a stake in the center. The cost is 30 taka (36 cents) a month for children under 3-years of age, rising to 50 taka for 4 to 5-year-olds.²¹⁴ • The cost to BRAC though is about \$50-\$60 per child per year in Bangladesh.²¹⁵ • In Bangladesh and Uganda, BRAC works with governments to scale the model through co-located Play Labs to support transition to primary school. • In other countries, BRAC provides technical assistance to adapt the model and trains local entities to implement it.

Name	Approach and outcomes	Financing model
Social Impact Bond		
<p>Impact Bond Innovation Fund (IBIF), South Africa</p>	<p>Approach and governance</p> <ul style="list-style-type: none"> • A results-based financing mechanism to improve early childhood learning and development outcomes in Western Cape, South Africa. The first such ECD impact bond in the global south. • The bond helped finance an expansion of an existing home-visiting program targeting 3 to 5-year-olds run by the Foundation for Community Work. • In this model, investors pre-financed the activities and were then paid based on meeting pre-agreed targets. • The targets covered enrollment and retention, attendance, and learning outcome improvements: 2,000 children recruited and retained over 3-years of age; children attended at least 50 percent of targeted home visits each year; met or exceeded a score of 0.2 standard deviations above the baseline on the Early Learning Outcomes Measure.²¹⁶ • The development process of structuring the bond took three years. <p>Outcomes and impacts</p> <ul style="list-style-type: none"> • Investors were paid based on achieving targets. The enrollment and attendance targets were achieved in full.²¹⁷ Learning outcomes was the only target that did not result in full payments; although improvements in learning scores were achieved, they did not reach the target.²¹⁸ • Using results-based financing like this can transfer risk to investors and ensure payment is for delivering results. But this requires the right targets. With only ten percent of payments contingent on learning improvement outcomes, investors may not have shared enough risk.²¹⁹ • With a narrow focus on three targets, the full impact of child development may not be fully understood. 	<ul style="list-style-type: none"> • The investors included The Standard Bank Tutuwa Community Foundation, Futuregrowth Asset Management, and LGT Venture Philanthropy who invested \$540,000 up front to finance a three-year program. • The outcome payers (equal outcome payments from each) were the Department for Social Development (DSD) in Western Cape province and ApexHi Charitable Trust. The public budget was insufficient, so private finance was brought in to underwrite 50 percent of the potential payment.²²⁰ • Technical assistance on design and procurement came from UCT GSB Bertha Center and Social Finance UK. • Mothers2Mothers and Volta Capital were intermediaries that supported implementation. • By 2020, investors had received an annualized return of 14 percent and received most of the payout.²²¹ Targets for learning outcomes only account for ten percent of payments, and as a result, only limited funds were not paid out.

These examples of promising approaches show that there are diverse ways of increasing access to childcare, increasing women’s empowerment, and creating new jobs. They are designed for the context they operate in and are funded in a variety of ways. This mix of approaches is characteristic of the ECCE sector and should be maintained to meet the childcare needs of diverse groups of users. Lessons can be learned from each example as potential investments are considered. Some of these are incorporated in the recommendations provided in the concluding section.



SECTION 4

Summary and recommendations

This section offers a set of general principles that could be adopted by CATALYZE to guide investments. It then presents a way of thinking about country-readiness for investment in ECCE and concludes with recommendations about how investments might be structured.

4.1. General principles for Catalyze ECCE investments

- **Minimize costs to parents and caregivers:** One of the largest barriers to expanding ECCE provision is affordability. Reducing costs to parents must be considered in any investment.
- **Build the triple dividend effect by layering ECCE on to investments in other sectors:** Many investments in women's economic empowerment, child health, adolescent reproductive health, and youth workforce development could incorporate ECCE, and vice versa. Taking this complementary approach could help these investments become more successful and reach targets across the triple dividend for children's development outcomes, women's economic empowerment, and macroeconomic productivity.
- **Invest in ways that promote sector coordination, dialogue, and advancement:** Ensure that CATALYZE investments do not single out or enrich individual operators but stimulate innovators to actively engage in the broader dialogue around the early childhood care and early

education system, the type of investment it attracts, and the long-term sustainability and growth of the sector in each country.

- **Support government priorities and augment public investments in ECCE where they exist:** Domestic resourcing is likely to be a contributor to ECCE sustainability in the medium term in several locations. Investments should stimulate non-state engagement that collaborates with the state through complementary provision, adherence to regulatory frameworks, or other types of public-private partnership.
- **Support the development and use of a core set of metrics to measure the impact of investment in ECCE:** Include metrics that measure the impact of investments on women's empowerment and well-being, looking not only at employment and income, but also at their overall work burden and mental health.
- **Reflect on USAID's comparative advantage in-country:** USAID's role and influence in the countries where it works varies. Decisions about where and how to invest will also vary. In one country, USAID might use its convening power to mobilize investment in ECCE, while in another, it might fill gaps in the availability of early-stage financing for ECCE services or bring its experience of robust monitoring and evaluation to the ECCE sector.

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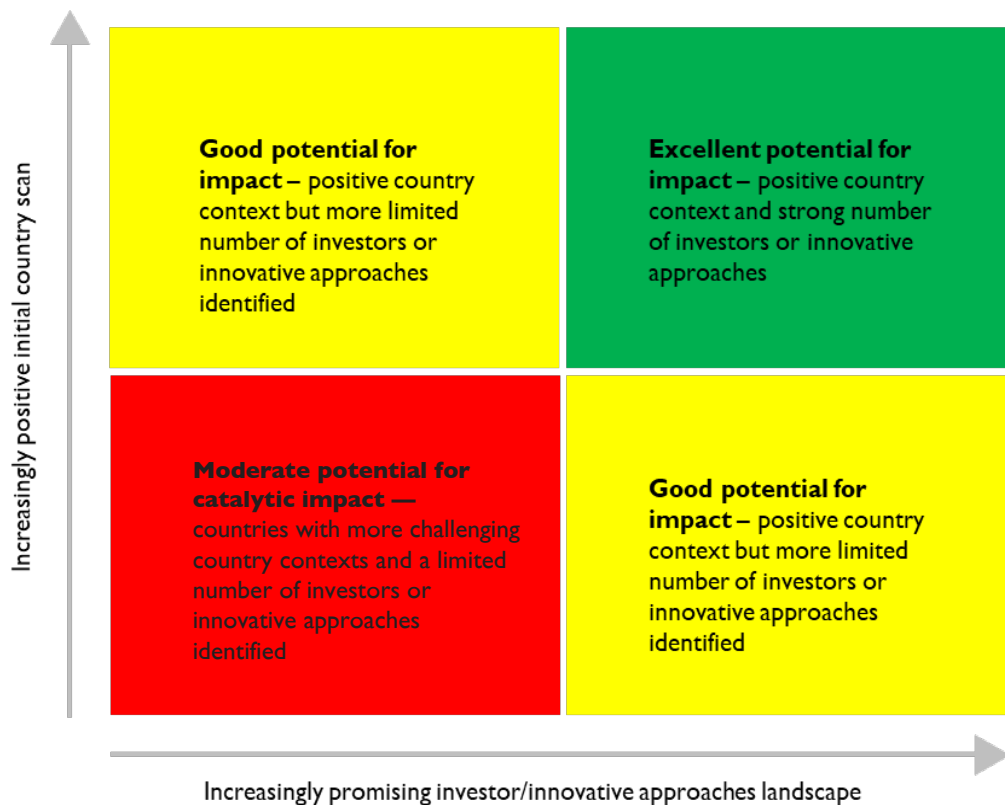


4.2. Thinking about country readiness for ECCE investment

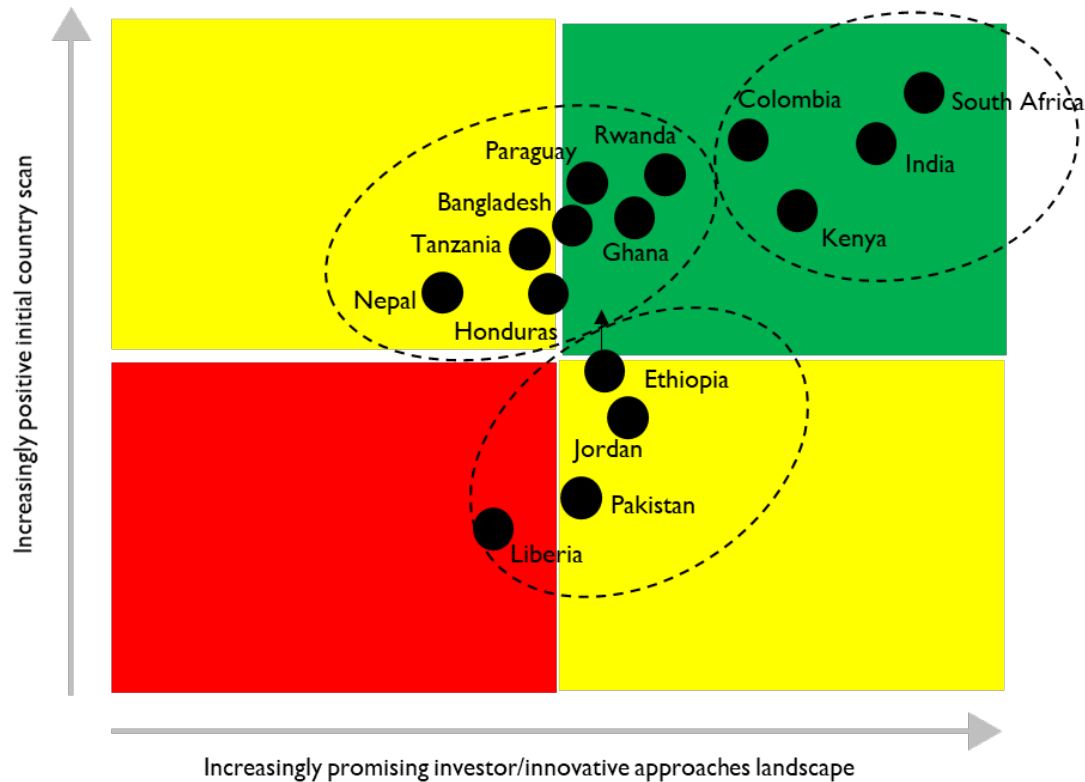
Country-level scans suggest that there is a need for investments in ECCE and potential to use private finance to catalyze activity in all countries investigated.

In some countries options are more numerous, varied, and easier to identify, but they exist everywhere. In all countries, there are opportunities for catalyzing better outcomes for children, women, and the wider economy.

The matrix provides a way of thinking about country-readiness for investment and its potential impact. A country in the top right-hand quadrant is one in which the policy and regulatory environment is well developed, where there is high demand for ECCE, promising approaches ready for investment, and a track record of impact investment.



The completed matrix below maps the 15 countries scanned. Only one of the countries appears in the bottom left quadrant (“Moderate potential”), suggesting that there is promising impact potential for ECCE investment almost everywhere. While each country has its own unique context, opportunities, and entry points, they can be categorized into three broad groups. It is important to note that within a group there is significant variation that can and will change over time. There is also significant variation within countries.



GROUP 1: India, South Africa, Kenya, and Colombia

This group of countries has the most mature and complex childcare markets with the most well developed or innovative types of provision, providers, and financing approaches. They feature pockets of excellent provision but still significant unmet demand and need for quality improvement. They are likely to allow for the most varied, complex, and sophisticated programming with a range of potential collaborators.

GROUP 2 Rwanda, Ghana, Paraguay, Bangladesh, Tanzania, Honduras, and Nepal

These countries have broadly positive country contexts with some strong potential investment partners or models but less variation and less established ECCE investment landscapes than Group 1. There are likely fewer options for this type of investments than Group 1, but still very good potential for catalyzing impact, especially at the higher end of the group.

GROUP 3 Liberia, Pakistan, Jordan, and Ethiopia

These countries have less favorable country contexts that pose various challenges. Even here there is potential for collaboration and investment - it may simply be harder to find or develop. Ethiopia is currently in this group due to its active state of conflict, but if the situation were to stabilize, it could move into Group 2, as the arrow indicates.

4.3 Thinking about how to invest

The structure of an ECCE investment will depend on several factors including location, the maturity of the market, the local regulatory framework, and the objective of the investment and partners. Drawing from the promising approaches and the country scans, some general recommendations about structuring an investment in ECCE are outlined below:

- **Encourage entrepreneurship in ECCE:** Support individuals to set up, formalize, and grow small childcare businesses. Do this not only through building quality of provision, but also through developing business management skills, additional revenue streams, and access to finance.
- **Leverage employer financing of childcare:** Engage employers through encouraging direct service provision or by supporting corporate partnership models such as Mobile Creches or Earlybird. Consider sector-based approaches to collaborating with employers, such as engagement with the tea sector in Rwanda, or the textile sector in Honduras. Seek opportunities to expand provision under existing regulations of private-sector provision of childcare that are unenforced or weakly adhered to in many locations.
- **Build on promising models:** It is evident from the high-level country scans that there are plenty of promising approaches to ECCE provision and financing already being implemented. Partnerships with USAID and investment through CATALYZE could help these approaches have a greater impact. This could be scaling up to new cities, developing new products and services to offer, or even replicating proven approaches in new countries.
- **Encourage the development of financial products for ECCE in mature markets:** Social impact bonds, results-based finance mechanisms, and other innovations or financial products are ripe for exploration in more mature care markets. In some countries, specialized financial products were created to help low-fee private schools pay for training and resources, for example, or to build new classrooms.²²³ Similar products could be developed for childcare entrepreneurs.
- **Hold investments accountable and link these to financing:** CATALYZE should consider using a payment-by-results or other results-based financial incentives. These could be in the form of social impact bonds or simpler results-based finance mechanisms. Results-based approaches could be used to incentivize consideration of the triple development outcomes dividend and should be linked to progress on improving access to quality ECCE, WEE, job creation, as well as sustainability.
- **Pair different types of finance in different contexts to spread risk and maximize expanded opportunities:** Opportunities for pairing finance options should be considered, taking into account that different finance approaches will be most appropriate depending on an investment's stage of innovation, scale, risk or timeframe and, in the case of blended finance, relationship with the international and domestic public sectors.

Determining which of these investment approaches are most appropriate or likely to be most impactful in a particular context requires a detailed understanding of the specifics of a given location and market. Initial entry points for the 15 countries included in this report and build on the preceding general recommendations are found in Annex I. These recommendations are based on initial data and research gathered in this landscaping study and presented as starting points for discussion. Other options are likely to emerge after further analysis is conducted on any target location.















ANNEX I







Country assessment and potential entry points







This annex provides an indicative assessment of how positive the country context for ECCE and women’s economic empowerment is and how promising the environment is from an investment and promising approaches perspective. This is based on the country scans set out in Section 2. The assessment is made using a five-level Harvey ball rating scale. A blank circle represents the least promising situation; a fully filled circle represents the most promising. The Annex also outlines potential entry points in each country. These are not exhaustive but offer initial considerations if thinking about potential investments in different places.









Country	Scan assessment summary	Potential entry points for CATALYZE
<p>South Africa</p>	<p>ECCE and WEE context</p> <p>Strong commitment to ECCE and good base to build on for women’s economic opportunities. High unemployment creates potential for impact. </p>	<ul style="list-style-type: none"> • Build on existing public investment and willingness to engage in blended finance approaches. • Collaborate with large, active network of philanthropies and foundations and a network of promising approaches these philanthropies and foundations already support. • Consider the role of employer-funded childcare, including the potential for cross subsidization models using high-income centers to support lower income ones. • Look at options for innovative and risk-taking or results-based finance through collaboration with social impact investing/bond partners. • Expand the USAID CATALYZE debt-financing model to ECCE centers.
	<p>Investor and promising approaches landscape</p> <p>A large variety of approaches for ECCE provision and a mature, complex set of financial models and investment approaches. </p>	
<p>Rwanda</p>	<p>ECCE and WEE context</p> <p>Strong government commitment to ECD and parenting, but stubbornly low penetration. Very positive environment for gender equity and women’s economic empowerment. </p>	<ul style="list-style-type: none"> • Align with the government’s aim to establish one ECCE center per community. • Enhance and scale up the work in the tea, rice, and mining sectors to develop employer-based solutions to private childcare. • Work with the various foundations to assess different models in different communities and scale. For example, build on the work with UNICEF to provide care to informal market workers. • Expand the CATALYZE debt-financing model to ECCE centers.
	<p>Investor and promising approaches landscape</p> <p>Some promising approaches and investments in the private sector with employers and smaller scale innovations supported by grant funding on which to build. </p>	
<p>Kenya</p>	<p>ECCE and WEE context</p> <p>Strong pre-primary education landscape backed by policy and enrollment data. ECCE provision is less formal but still offers various options. Strong women’s economic empowerment base to build from. </p>	<ul style="list-style-type: none"> • Support well-established childcare innovators to expand geographic reach or scope of services to marginalized areas or sub-regional capitals. • Collaborate with the large and active network of philanthropies and foundations and build on existing investments. • Support expansion of existing employer-based provision or explore cross-subsidization models using employer-financed childcare. • Explore options for new investing options, including social impact bonds with UN agencies. • Explore engagement of venture capital associations in ECCE in collaboration with the Sustainable Development Platform.
	<p>Investor and promising approaches landscape</p> <p>Diverse set of promising approaches and models supported by a large number of social and grant making investors. Opportunities across the wider health and education landscape for potentially more complex investments. </p>	

Tanzania	<p>ECCE and WEE context</p> <p>Recent surge in focus on ECD, childcare and parenting. Strong policy basis but weak implementation. Improvements needed on gender equity and women’s economic empowerment.</p> 	<ul style="list-style-type: none"> • Use the space that the Familia Bora and the new multisectoral early child development and parental support program opened to engage on childcare opportunities. • Explore collaboration with women’s economic empowerment investments (e.g., Gates Foundation, Bloomberg, Aga Khan). • Collaborate with BRAC, IRC and those working on grant-funded parenting and early learning models to explore how these could be developed with greater private-sector linkages. • Link to and build on emerging CATALYZE investments in pre-primary and other relevant USAID investments and priorities in the country.
	<p>Investor and promising approaches landscape</p> <p>Some interesting investments not only in ECCE and ECD but also in gender equity. More state-dominated environment but with room for investment.</p> 	
Ghana	<p>ECCE and WEE context</p> <p>Policy environment committed to reform and learning improvement in the early years. Improvements needed on female political empowerment and access to more professional, technical and higher skill/paying careers.</p> 	<ul style="list-style-type: none"> • Build off and connect into public investment of two years of kindergarten, exploring wrap-around services to kindergartens that support optimal holistic development of children and female labor needs. • Collaborate with existing foundations to expand scope or services of those they support. • Explore collaboration with investors in women’s economic empowerment. • Explore viability of layering ECCE services on support to private schools through USAID and private investors.
	<p>Investor and promising approaches landscape</p> <p>Some interesting if limited investments in ECCE approaches. A more established private school environment to build on too.</p> 	
Liberia	<p>ECCE and WEE context</p> <p>Some ECCE policies in place but very weak implementation due to weak governance and very limited resources. Some positive initiatives on gender equity from which to build a stronger foundation.</p> 	<ul style="list-style-type: none"> • Explore whether market and human capital are in a position to support successful childcare investment. • Explore collaboration with the World Bank Adolescent Girls Program and RFPs related to the World Bank Invest in Childcare Initiative. • Explore collaboration with foundations and grant-making bodies already present in Liberia on the potential for innovative financing for ECCE.
	<p>Investor and promising approaches landscape</p> <p>Variety of small, largely grant-making organizations with isolated investments in relevant areas.</p> <p>Challenging private-sector landscape.</p> 	

Ethiopia	ECCE and WEE context Commitment to pre-primary expansion and other forms of early learning. Shifting from ECE to ECD focus in policy terms. Strong female labor participation but other equity challenges.		<ul style="list-style-type: none"> • Layer on to the USAID/LEGO investment, testing and piloting of innovative models. • Collaborate with results-based financing of Future Hope Addis Ababa and explore where CATALYZE can bring added value or replicate in different locations. • Connect to government ECD targets and priorities connected to results-based World Bank funding.
	Investor and promising approaches landscape Investments from major funders such as the World Bank on ECD and USAID/LEGO collaboration. Some interesting investments in development but uncertainty caused by current conflict.		
Honduras	ECCE and WEE context Formal ECCE enrollment is limited. Strong family-friendly policies. Requirements for employer-based childcare but often not adhered to.		<ul style="list-style-type: none"> • Explore connection of CATALYZE private sector-focused interventions to the upcoming Inter-American Development Bank initiative. • Collaborate with the World Bank ELP to structure an investment. • Explore ways to support implementation of existing regulations for private sector employers to provide childcare. • Collaborate with partners already supporting women’s economic empowerment to integrate ECCE, and connect existing investments to the care economy.
	Investor and promising approaches landscape Investments from the World Bank and GPE and a forthcoming Inter American Development Bank loan addressing ECD. More significant investments in women’s economic empowerment than ECCE.		
Paraguay	ECCE and WEE context Strong ECCE policy and regulation context with a multi-sector care policy at the center. Good female labor participation rate with family-friendly policies.		<ul style="list-style-type: none"> • Support implementation of the care policy developed by the inter-institutional roundtable group. • Collaborate with the IDB or UINCEP/LEGO Foundation on their ECD investments. • Explore lines of collaboration with partners already supporting women’s economic empowerment to connect investments to ECCE and to the care economy. • Build on existing CATALYZE investments with Fundación Paraguaya.
	Investor and promising approaches landscape An interesting if perhaps limited mix of loan financing from the IDB, government collaboration with private grant makers (LEGO Foundation), and investments in women’s economic empowerment.		

Colombia	<p>ECCE and WEE context</p> <p>Historically strong public commitment to childcare, child development, and early learning. Conducive policy environment for investment and collaboration, including in relation to Venezuelan migrants.</p> 	<ul style="list-style-type: none"> • Collaboration with the government and IDB on public-private partnerships in childcare. • Explore collaboration with LEGO Foundation and local social enterprise aeioTU. • Explore potential for private finance to support and connect to existing public subsidies for childcare in low-income groups. • Explore collaboration with LEGO Foundation, Bernard Van Leer Foundation, and USAID Colombia on interventions targeting Venezuelan migrants. • Explore collaboration with Instiglio and IDB Innovation Lab on results-based finance for ECCE.
	<p>Investor and promising approaches landscape</p> <p>Strong public sector investment complemented by a range of private investment and grant-making approaches.</p> 	
India	<p>ECCE and WEE context</p> <p>Wide variation in access and quality of ECCE but a good policy landscape and huge variety of existing childcare provision. Significant challenges in relation to women’s economic empowerment in some locations.</p> 	<ul style="list-style-type: none"> • Due to the tremendous size of India’s population and variation in ECCE provision, focus investments on a particular state or city. • Explore potential for public-private partnerships layered on <i>anganwadis</i> or the Integrated Child Development System services to increase <i>anganwadis</i>’ effectiveness. • Collaborate with established innovators such as SEWA and Mobile Creches and foundations that support them. • Explore new financing approaches feasible through an expansion of the existing primary and secondary private school finance market into ECCE. • Explore extensive mobilization of the private equity markets to support quality improvement in privately-provided ECCE for the lower and lower-middle-income populations. • Explore appetite for creative financing tools, learning from the experience of the social impact bond.
	<p>Investor and promising approaches landscape</p> <p>Mature and complex investor context giving rise to a wide variety of potential collaborations.</p> 	
Nepal	<p>ECCE and WEE context</p> <p>Reasonable ECCE enrollment rates with significant income and geographic variation. Focus on education more than childcare or women’s economic empowerment.</p> 	<ul style="list-style-type: none"> • Explore the potential for existing investments in ECCE (public, private or civil society) to transform or be layered to also benefit women’s economic empowerment. • Explore collaboration with funders already active in supporting existing models to identify areas ripe for innovation. • Explore collaboration with existing private models to investigate possibly cultivating female entrepreneurs, or integrating innovative revenue schemes such as those seen elsewhere, with Tiny Totos, for example.
	<p>Investor and promising approaches landscape</p> <p>In general, grant-making and donor organizations work with local ECD organizations.</p> 	

Jordan	<p>ECCE and WEE context</p> <p>Recent focus on expanding Kindergarten Education, but less focus on center-based enrolled below this with high rates of care by mothers. Low female labor participation and some significant challenges to gender equity.</p> 	<ul style="list-style-type: none"> • Collaboration with the Queen Rania Foundation, given its influence in the country and focus on education. • Approach the World Bank Mashreq Gender Facility to explore innovative collaboration to wrap ECCE around gender-focused investments. • Collaboration with actors interested in ECCE for displaced populations such as the LEGO Foundation, Moving Minds Alliance. Approach angel investors such as Apsara or Clifford Chance Foundation to collaborate on bolstering quality for ECCE among conflict-affected populations. • Integrate approaches that address gender roles around women’s engagement in the labor force and male engagement in care. • Given the established private sector kindergarten provision, explore opportunities with these actors to expand provision at nursery level.
	<p>Investor and promising approaches landscape</p> <p>A variety of investors supporting programs in the crisis context connected to the Syrian refugee situation. Some influential domestic investors as well.</p> 	
Pakistan	<p>ECCE and WEE context</p> <p>Limited enrollment and focus on ECCE but evidence of some potential for growth. Low female labor participation and some significant challenges to gender equity.</p> 	<ul style="list-style-type: none"> • Collaborate with stakeholders to target specific sectors, such as textiles, for enhancement of ECCE provision. • Support provision to improve compliance with law by private sector employers who employ female laborers. • Work with local innovators such as Rupani Foundation to improve and expand their offerings. • Implement social and gender norms around women’s economic empowerment and male care, as part of investments in ECCE.
	<p>Investor and promising approaches landscape</p> <p>Pockets of investment from donor agencies and grant-making organizations. Employer-financed care exists but not to the extent that regulations require.</p> 	
Bangladesh	<p>ECCE and WEE context</p> <p>Moves to expand pre-primary provision and government childcare in certain places. Strong NGO-based provision. Female labor participation is relatively low but there are some supportive family policies.</p> 	<ul style="list-style-type: none"> • Engage private sector and organizations like Wee Learn, Bromley Bee, or Pulki to support private sector provision and consider further cross-subsidization to expand operations in lower-income locations more effectively. • Collaborate with BRAC, given their prominence and scale of operations in Bangladesh, to potentially expand Play Labs to address women’s economic empowerment needs and connect to private sector delivery approaches. • Collaborate with youth-focused, or workforce development-focused, funding sources to skill up young NEETs (Not in Education, Employment or Training) to be able to accept entrepreneurship or to provide services in private provision of ECCE.
	<p>Investor and promising approaches landscape</p> <p>A variety of particularly strong domestic and international investments in partnership with NGOs and social enterprises, particularly through organizations such as BRAC.</p> 	

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