



QUARTERLY BRIEFING · Q3 2026

care economy brief

Signals shaping the infrastructure, policy, and responsible technology behind the \$648B+ Care Economy.



four signals to watch

Care is moving from the margins of economic policy to the center of how we build, govern, and invest in the future. Signals drawn from the FamTech.org member network and private founder forum.

EMERGING

01

AI as a Partner to Caregiving

Augmentation is advancing faster than substitution.

Human judgment stays non-negotiable

EMERGING

02

Technology Build Time Is Falling

Trust is becoming scarcer than creation.

One MVP: 6 weeks, \$4K reported

EMERGING

03

States Are Moving Fast

Local policy is setting the near-term rules.

Colorado and Illinois lead

PERSISTING

04

Care is entering national industrial policy.

\$500M+ in workforce commitments

AI is becoming a partner to caregiving

The strongest signal is augmentation, not substitution — and it is already happening. AI is absorbing administrative work, pattern recognition, monitoring, and access, while human judgment and connection remain non-negotiable.

The Caregiving AI Responsibility Initiative is being built as an independent guide for the sector, alongside the Oxford Institute for Ethics in AI.

WHY IT MATTERS

Responsible use is quickly becoming a condition of trust. Shared standards can keep people, consent, and dignity at the center.

WHERE AI IS LANDING

Admin

Efficiency

Patterns

Clinical insight

Access

Availability

Monitoring

Vigilance

HUMAN CONNECTION & JUDGEMENT

remains the core

Source: Oxford Institute for Ethics in AI

technology build time is falling, fast

Tandem, a FamTech member company, built an enterprise-grade MVP in six weeks for \$4,000. Low-code and AI-assisted development are expanding who can build in the Care Economy, on timelines that were unrealistic two years ago.

The bottleneck is moving from “can it be built?” to “can it be trusted and scaled?”

WHY IT MATTERS

As creation gets cheaper, confidence becomes scarcer. Standards, vetting, and trusted networks matter more — not less.

6

WEEKS TO
BUILD

\$4K

REPORTED
COST

THE BOTTLENECK IS SHIFTING

Building barrier falling → trust
barrier rising

Illustrative company-reported example from FamTech member Tandem; not a sector benchmark.

states are moving fast

State legislatures, not Congress, are setting the near-term rules for AI and care. Colorado paired AI risk management with a pioneering careworker tax credit; Illinois added protections covering AI in recruitment and hiring.

EPIC Design Lab is also demonstrating how public-private infrastructure can expand child care capacity.

WHY IT MATTERS

State policy is a leading indicator of federal attention — and regulatory clarity often determines where capital moves next.

STATE POLICY WATCH · 2024–26

COLORADO

AI risk management

SB24-205

COLORADO

Careworker tax credit

HB24-1312

ILLINOIS

AI hiring protections

HB 3773

Source: EPIC Design Lab

care as national infrastructure

National industrial policy is starting to use the language this network has used for years. OpenAI's *20 Ideas for AI-Era Industrial Policy* and *Industrial Policy for the Intelligence Age* explicitly recognize caregiving as economically valuable, durable work.

RAISE US launched in June with more than \$500M in workforce-redeployment commitments and care prominently represented.

WHY IT MATTERS

The market is proven. The unresolved gap is governable infrastructure that directs capital toward care.

\$500M+

PRIVATE-SECTOR WORKFORCE COMMITMENTS

Policy language

Workforce capital

Care recognition

Sources: RAISE US · OpenAI industrial policy

two organizations, one mission

FamTech.org builds the network. FamTech Futures turns its intelligence into shared action.

THE NETWORK

FamTech.org

The nonprofit membership hub connecting the people building, funding, and shaping the Care Economy.

THE ACTION

FamTech Futures

The program turning network intelligence into research, standards, policy resources, and shared action.

NETWORK GROWTH · MID-YEAR 2026

47

new members in 2026

~600

member hub accounts

4,000+

website visitors

62%

avg. newsletter open rate

12

events convened

Source: FamTech.org mid-year 2026 member newsletter (August 21, 2026).

CORE INITIATIVES

turning intelligence into shared action

CARI

Independent guidance for responsible AI in caregiving contexts.

Oxford · ethics partner

Workplace Caregiver Transparency

A shared data standard and ROI framework that makes caregivers visible at work.

\$70B annual disruption · Johns Hopkins + NAC

CareForce

Bidirectional intelligence connecting families' lived experience with builders.

Design phase · NAC · advocacy partner

Care Policy Intelligence

Translating fast-moving state and federal policy into action for the field.

45F / 45S · playbooks · BPC

PARTNER WITH FAMTECH FUTURES

Research, standards, policy resources, and shared action move faster with aligned partners.

partnerships@famtech.org →

SELECTED REFERENCES

01 · Oxford Institute for Ethics in AI

02 · EPIC Design Lab

03 · RAISE US launch announcement

04 · OpenAI: Industrial Policy for the Intelligence Age

05 · OpenAI: 20 Ideas for AI-Era Industrial Policy

06 · A New Era of Care event registration