Financing in Early Education and Care

Foreword

Access to high-quality early childhood education and care (ECEC) is fundamental to unlocking opportunities and equity of outcomes for all children, particularly those who face disadvantages in early life. Yet we know that ECEC in the UK is in a state of crisis, and that funding is at the heart of the issue. This rapid review seeks to contribute an evidence-based foundation for a sustainable financing solution – one that puts child wellbeing and outcomes at its heart.

The UK, and especially England, suffers from a paradox. Even after the full rollout of government funded early childhood education and care hours completes in September 2025, childcare costs will still place a disproportionate burden on parents, yet ECEC costs are one of the most significant ring-fenced items of public expenditure, with the state bearing up to 80% of the cost of ECEC in England (equivalent to £8.5 billion). Compounding this, we see that areas of greatest disadvantage are often childcare deserts, while the workforce is undervalued in pay and status, leading many professionals to leave for other industries. Despite the best efforts by many dedicated, passionate professionals, quality of care for our children inevitably suffers.

We therefore call for a radical transformation of the UK ECEC system, and this rapid review provides an evidence base for such a transformation. Over the following chapters, we examine international comparators through the lens of child outcomes. We argue that a review of the UK's ECEC funding system is a necessary first step for any further reforms. Only if we anchor the ECEC system in a solid funding foundation, one that is based on our social contract, can we tackle issues around staff retention, professional status and ultimately the quality and provision of ECEC across the UK. There are many lessons that we can learn from other countries' ECEC systems. Considerations should include the way ECEC is commissioned, how markets are structured and how costs are apportioned across society. ECEC is an investment in our society's future: it is a key element of national infrastructure that shapes the next generation while enabling labour market and training access for parents; we disregard its fundamental importance at our own peril. A high-quality ECEC system is paramount to ensure the success of other governmental strategies around growth and child poverty, and to allow the Best Start in Life strategy to come to fruition.

We hope the data we present will allow discussions by policymakers and professionals to be grounded in evidence. At time of publication, we see many of these interventions already in place in other countries, for example Finland and Denmark, while Italy and Spain are both actioning substantial, system-wide reform. These countries show us that a different approach is possible – and, in fact, is essential for the good of our children.

It is only when we are clear which mechanisms sustainably put children's wellbeing first that we can achieve the change that is so badly needed. Let us use these insights to deliver the best ECEC, for the most children.

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This review has also been generously endorsed by:

CENTRE FOR YOUNG LIVES

EARLY EDUCATION AND CHILDCARE COALITION

PREGNANT THEN SCREWED

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Introduction

Outlook for the UK

This review of ten European countries with strong child outcomes reveals consistent patterns in how their early childhood education and care (ECEC) systems are structured and financed. While the UK has made significant strides towards improving the offer for parents by expanding funded hours, the same cannot be said of child outcomes. Comparing international approaches highlights fundamental differences in the way each system is funded that merit our consideration.

Key patterns among our European partners

1. Progressive funding mechanisms and universal access

The most striking contrast between the UK and the reviewed countries is the approach to eligibility. None of the ten countries tie ECEC access to parental employment status.[1] Instead, they treat ECEC as a universal right, with Finland, Denmark and Slovenia offering unconditional legal entitlement[2] as early as between 6 and 11 months. Even in countries with more limited provision for under-3s, such as France and Italy, access is based on need and availability rather than employment status.

This approach to eligibility is underpinned by an inherently progressive funding mechanism. By contrast with England's[3] system of free childcare hours for working families and limited support for non-working families, other sliding-scale

[1] *Under the Swedish system, children under 3 have entitlements if their parent(s) work/study/have caring responsibilities. We have therefore excluded this from consideration, as it is not solely tied to employment.*

[2] *There is a difference between legal entitlement and compulsory attendance. Both legal structures require public authorities to be committed to guaranteeing a place. However, a legal entitlement guarantees the right to attend while compulsory attendance imposes a legal obligation. The nature of the guaranteed place therefore changes — a compulsory policy implies legal entitlement, because authorities must provide enough places for all children subject to the attendance obligation. In Europe, compulsory ECEC is more common than legal entitlement alone (European Commission, 2025, pp. 51–53).*

[3] *We have chosen to focus here on England rather than the UK, as the differences in this binary provision are most stark in the English system.*

fee structures.[4] In Slovenia, parents pay between 0% and 77% of costs depending on their income. Denmark caps parental contributions at 25% with full exemptions for low-income families. Finland's fees range from €0 to €311 per month based on family size and income, with approximately 50% of children accessing completely free provision. While some of these countries do spend substantially more on ECEC as a percentage of their GDP, they also obtain far better outcomes in the rankings we consider here.

If we consider other policy mechanisms that support demand-side funding for ECEC, countries such as France offer progressive mechanisms that provide families with more than two children (*familles nombreuses*) with subsidies for school meals and other expenses. These mechanisms recognise that the more children you have, the more costs you are likely to incur, and therefore the more support you are likely to need. In contrast, the UK's child benefit scheme caps payments at a maximum of two children, which can be classed as a regressive funding mechanism.

2. Public and publicly controlled private provision

A second notable pattern is the predominance of public or publicly controlled private provision. In England, 70% of group-based providers operate privately (Department for Education, 2021), with growing consolidation under for-profit chains through mergers, acquisitions, and private debt (Simon et al., 2022b). Recent estimates suggest 57% of all provision is by *private for-profit companies* (Simon et al., 2022b).

By contrast, Denmark's municipal facilities account for over 70% of provision, Finland's for 82%, and even in Spain's mixed system over 80% of provision for the 3–6 age group is state-led.

Where private provision exists in these European systems, it typically operates under tight public control through 'concession' systems (Slovenia, Spain) or the providers are primarily non-profit organisations. Austria channels 58% of provincial ECEC funding to non-profits, while France's significant private sector for under-3

[4] *Fees increase when income increases and vice versa.*

provision is dominated by parent associations and social sector groups, representing over 40% of the market.

In summary, public and private provision both exist within our ten nations, but where there is a private market, the for-profit sector tends to be small, and private organisations tend to primarily consist of non-profits and voluntary or community organisations that are tightly regulated and managed by the public authorities. France, for example, has an estimated 9% of provision by for-profit companies, by contrast with the estimated 57% in the UK.

3. Investment levels and distribution of funding

While spending levels vary, countries with better child outcomes generally invest more in ECEC than the UK's estimated 0.3–0.5% of GDP. Sweden spends 1.6%, Denmark 1.2% and France just over 1% (OECD, 2023; Drayton et al., 2025). However, the review suggests that *how* money flows through the system is just as important as the total amount of money; this applies in particular to the impact ECEC can have on combatting inequality.

Most of the reviewed countries operate highly decentralised funding systems, where municipalities have significant autonomy in allocation and management. While some local authorities in the UK do in theory have discretion over funding allotment, the reality is that this discretion can be highly limited[5] (Alma Economics, 2025). The European approach typically combines base funding with targeted supplements – Sweden's equalisation system addresses municipal tax capacity differences, while France layers multiple support mechanisms including tax credits, which cover 50% of childcare expenses up to €3,500 per child.

[5] *This should not be taken to imply that more control fixes the underlying issues; rather, we are suggesting that administration, allotment and amount combined with a strong central vision play an important role. Scotland has significantly more discretion at an LA level and evidence does not suggest that this has, in and of itself, provided a solution.*

4. Workforce development

The reviewed countries consistently prioritise workforce development through public investment. Austria provides free or low-cost continuing professional development through provincial organisations. Finland funds ECEC teacher training through university core budgets, treating it as integral to public higher education. France's Personal Training Account (*compte personnel de formation*) provides up to €800 annually for professional development, funded through employer contributions.

This investment in the workforce contrasts sharply with the UK context, where providers struggle to maintain qualified staff amid funding pressures, and workforce churn is particularly high in private for-profit settings (Jitendra, 2024; Melhuish & Gardiner, 2019).

Specific takeaways for the UK

1. Our system is more complex and more expensive than European equivalents.

The UK's current system, even after considering the maximum available support under the 30-hour offer,[6] will require working families earning £34,000 annually to spend an estimated 11% of gross wages on childcare (England-specific calculation by Pollard & Stephens, 2025).[7] This compares unfavourably with other European systems, where maximum contributions rarely exceed 10% of income and fee caps protect family budgets (Yanatma, 2025; Hagopian, 2025; OECD, 2023).

The European evidence suggests the key to closing that gap is not necessarily to spend more public money, but rather to design a system that reduces complexity

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[6] *There are differences between nations and across age ranges, so this is intended as a catch-all term to represent the 30-hour maximum support available across all nations if certain criteria are met.*

[7] *This figure is likely to be an under-estimate, as the authors base the calculation on 40 hours, for 50 weeks, as 'full-time'. This differs from the 50-hour, for 50 weeks figure derived from the Coram Childcare Survey 2025, where to account for a full-time place, we also factor in pick-up and drop-off which better represents a parent's lived experience.*

and costs for families. The UK's mix of free entitlements, tax credits, complex benefits schemes and high out-of-hours fees, which are needed to compensate for poor public funding rates, creates an administrative burden for both providers and families while still leaving significant gaps in affordability.

2. We treat childcare as employment support.

Perhaps the most fundamental difference is conceptual. The UK primarily frames ECEC in terms of enabling parental employment,[8] while the reviewed countries position it as supporting child development and education. This difference is reflected in eligibility criteria, funding mechanisms and quality frameworks. The European approach recognises that all children, as well as society at large, benefit from quality early education, regardless of parental employment status. A child outcomes-centred approach enables countries to reap the long-term benefits of investments in early childhood. The evidence is overwhelming that such a preventative approach not only fosters positive outcomes for children but also pays for itself by avoiding far costlier remedial interventions later in life (Heckman, 2008).

3. Our for-profit private-led system is less sustainable than alternative models.

With UK providers reporting closures despite public investment, and families still facing unaffordable costs despite expanded funded hours, the current model of ECEC provision and financing appears increasingly unsustainable if we want to achieve better child outcomes. The European examples suggest that predominantly public provision, or tighter public control of private providers, may offer more stable and equitable outcomes.

If the current system isn't working for the government, for parents or for non-profit providers, then it begs the question: who *is* it working for? The evidence

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[8] *We acknowledge that Scotland's ECEC expansion was initially grounded in child development, but parental employment was eventually added into the outcomes list and continues to be a political priority.*

suggests that over the past decade, the main model of childcare in the UK has shifted to medium and large commercial companies, which now provide the largest share of places (LaingBuisson, 2019; Redwoods Dowling Kerr, 2020), indicating that private capital has benefitted and grown within the current system through mergers, acquisitions, and debt (Simon et al., 2022b).

An interview with a senior company executive from a large private-for-profit company highlights an increasing focus on shareholders over children:

> ‘Nurseries are increasingly financed through private equity whose primary aim is to maintain high margins to protect profit levels to ensure successful exits when they sell the company. The starting point for any owner/exec of a nursery/group should be to make sure there is a quality environment for children in their early years and to enable parents to go to work. I felt we should also value the work the (97% female) staff did and reflect that value in their pay rates… But there is a contradiction between service to parents and commercial enterprise, and now the increasing involvement of private equity companies means that the balance has swung and there is much more of an emphasis on profit.’
>
> *(Simon et al., 2022)*

Conclusion

This review suggests that countries achieving better child outcomes share several characteristics that are notably absent in the UK system: childcare access as a right rather than an employment benefit, progressive funding that protects family incomes, predominantly public provision or control via non-profits and sustained investment in workforce development.

It's not **what** we spend, but **how** (progressive rather than regressive funding) and **where** (public or publicly controlled provision) we spend it that offers opportunities to create a future where child outcomes are put first.

Directly transposing any single country's model would be neither feasible nor desirable. However, the consistent patterns across these diverse European contexts tell us that we need a fundamental redesign of the system architecture to achieve better outcomes for children. Such a redesign could also address issues around affordability for families and sustainability for providers. That is not something that can be achieved simply by incremental funding increases.

The evidence indicates that treating ECEC as a public good, similar to primary education, creates more equitable access and better value for public investment (Moss, 2024). As the UK continues to expand funded hours and considers its options for how best to fund its ambitious ECEC goals, we can learn valuable lessons from the ways other European countries structure and finance their systems. Applying those insights would help ensure that increased public investment translates into improved outcomes for children, families and the workforce that supports them.

Limitations

This rapid review was conducted pragmatically over a three-week period to serve the immediate needs of policymakers as they consider ECEC funding reforms. It is not intended to replace a rigorous academic systematic review, but rather to provide timely, actionable insights drawn from European best practice. While we have endeavoured to ensure accuracy in translating and interpreting European policy documents, the compressed timeline may have resulted in some nuances being lost in translation – particularly around institutional terminology, since the equivalents to concepts such as 'vocational colleges' and 'pedagogues' have different meanings and professional status across other European contexts.

Our methodology, while thorough, did not follow formal systematic review protocols such as the PRISMA guidelines, and our country selection, though based on clear criteria (UNICEF and Innocenti rankings), necessarily excluded some relevant comparators. Notably, we were unable to include Norway, despite its likely relevance to this analysis. Additionally, the rapid pace of policy change in this sector means that some recent developments may not be fully captured, particularly given our reliance on documents published through early 2025. Enterprise-grade AI tools were responsibly employed throughout the research process to assist with data collation and editing, with all sources and literature manually verified by qualified researchers. Finally, while we have attempted to present funding mechanisms and governance structures consistently across countries, the inherent complexity and variation in how different nations conceptualise and deliver ECEC – from integrated to split systems, from federal to unitary states – means that appropriate caution should be taken when making direct comparisons.

Countries included

1. Austria
2. Denmark
3. Finland
4. France
5. Italy
6. Lithuania
7. Portugal
8. Slovenia
9. Spain
10. Sweden

How did we choose these ten countries?

Countries were chosen based on the UNICEF ranking of childcare provision and the Innocenti ranking of child outcomes. Countries that appear in the top 20 in both rankings were selected for our dataset. Ranking tables have been provided in the appendix.

Alternatives were considered, such as checking the most Pareto-efficient set[9] or a composite index weighted by rankings. But since the most Pareto-efficient set is included in our selection anyway and an initial analysis suggested the composite rankings would be very similar, for pragmatic reasons it was decided to stick with the simplest approach.

Note regarding Norway:

Norway is often ranked among the top countries for child outcomes, but it is absent from our list of ten. This is primarily because Norway was not included in Innocenti's 2025 leaderboard due to missing data on life satisfaction. Given its scores across all other domains and its fifth-place ranking in UNICEF's list, we can say with a degree of confidence that Norway would likely fall within our top ten. However, for the sake of methodological consistency we have opted to leave Norway out so that our approach is replicable for future studies.

[9] *An optimally allocated set of countries distributed along a Pareto-efficient frontier, which means they are not dominated by any other country on either ranking. This set is Denmark, Sweden and Portugal.*

Country profile 1: Austria

Overall ECEC structure

In Austria's federal system, ECEC legislation and policy implementation is the responsibility of the nine provinces, meaning provision can vary from one province to the next. In general, ECEC in Austria is divided between two different stages: (1) early childhood educational development for children aged under 3 (ISCED 010) and (2) pre-primary education for children aged 3 to 5 (ISCED 020; collectively, 010 and 020 are referred to as ISCED 0). The main provision models for these two different stages are crèches and kindergartens, respectively, but there are also unitary settings where a single facility provides for multiple age groups (1–6 years) (Eurydice, 2025b; European Commission, 2025, p. 211). While most crèches are privately run, 72.5% of kindergartens are maintained by public regional authorities (Eurydice, 2025a; Jungreithmeier, 2022).

In Austria, public funding is the primary source for both ISCED 010 and ISCED 020. Total public expenditure on ECEC as a percentage of Austrian GDP was 0.67% in 2021 (European Commission, 2025, p. 45). Public investment in ECEC relative to GDP increased by 17% between 2015 and 2021. This growth is above the average for OECD countries, which stood at around 9% over the same period (OECD, 2024). In 2019, 91.19% of total spending on ISCED 0 (in absolute terms: €1,699.9 million out of €1,849.7 million) was publicly funded, with the remainder (€150.1 million) coming from private sources (Eurydice, 2025c).

Funding governance

Funding governance in Austria is highly decentralised: the federal government spent only €9.7 million on ECEC in 2019. In contrast, the provinces spent €1,146.1 million and the municipalities €1,317.6 million (Eurydice, 2025a). In 2020, at the provincial level, the main beneficiaries of this were private non-profit organisations (45.6%) and municipalities (31.7%). The municipalities likewise transferred the majority (64.1%) of ECEC funding to private non-profit organisations (Eurydice, 2025a). Public ECEC funding in Austria is predominantly input-based: staffing and space requirements are conditional on the number of children per setting. Group sizes and staff qualifications are also considered. The exact regulations depend on the type of setting and province (Eurydice, 2025a).

The Austrian funding model also includes special-purpose grants to enhance ECEC funding. These federal grants are earmarked funds with resources specifically allocated to a particular purpose or project (Eurydice, 2025a). A policy framework provides guidance for the federal government and provinces to create earmarked grants that specifically target kindergartens and early development. In 2022, agreements for special-purpose grants were established for the ECEC sector, introducing an amendment to the 15a agreement on the financing of kindergartens (2022) (Eurydice, 2025a; Krenn-Wache, 2024). This amendment provides the provinces with an extra €200 million of federal funding per year for ECEC between 2022 and 2027. The extra funding is allocated based on the proportion of 6-year-olds[10] in a province. A further €1 billion in subsidies has been earmarked for the same period, 2022–2027, to prioritise ECEC places for children under the age of 3, as well as opening hours, staff–child ratios and language support (Eurydice, 2025d).

Eligibility model and accessibility tools

In Austria, the cost and accessibility of ECEC vary across provinces, since the provinces have responsibility for the design and funding of provision. While some provinces make the entire early-years sector free of charge, in most cases parents contribute means-adjusted fees for services beyond the basic entitlement, which can range from €40 to €440 per month, plus additional charges for meals, materials and trips (Eurydice, 2025a). Since 2009/10, a universal 'free kindergarten year' has guaranteed all children aged 5 at least 20 hours of free attendance per week in their final year before school. This is the main demand-side tool. After the age of 5, children enter free, compulsory primary education (Eurydice, 2025a). As such, there are four years between the end of paid parental leave and the start of

[10] *That is the age when ECEC usually becomes universal and free of charge in Austria. More about the eligibility model below.*

free compulsory education, meaning Austria has a greater than average ECEC gap (European Commission, 2025).

In terms of supply-side tools to fund and support ECEC, the ISCED level required to become a core ECEC practitioner in Austria is 5, regardless of the children's age group, which is below a bachelor's degree or equivalent (European Commission, 2025). Nevertheless, the ECEC profession is institutionalised to a certain extent: entry routes, curricula and credentials are nationally defined and linked to regulated professional roles (Krenn-Wache, 2024). The main route to professional status is a five-year programme at a college for early childhood pedagogy (Bundesbildungsanstalt für Elementarpädagogik). Such colleges are part of the public secondary school system and are financed by the Federal Ministry of Education (Krenn-Wache, 2024). For students facing financial constraints, there are study grants (*Studienbeihilfe*) and boarding subsidies (Krenn-Wache, 2024). Provision and regulation of continuing professional development (CPD) depends on the province. CPD is generally offered for a small fee or free of charge by relevant providers in the province (Krenn-Wache, 2024).

There is a minimum wage policy in place in Austria, specifically for employees in private ECEC centres with a regular working week of 40 hours. The minimum monthly salary for an early childhood pedagogue in the first and second years of employment is €2,473 (gross), reaching €3,418 (gross) in the 40th year of employment (Krenn-Wache, 2024). Austria also stands out for its private-sector initiatives aimed at building workforce capacity. For example, KIWI Academy, a private, non-profit organisation, offers a structured, long-term CPD programme for managers, educational professionals and assistants in kindergartens and out-of-school centres (Krenn-Wache, 2024).

Summary table: Austria's ECEC system

CATEGORY	AUSTRIA'S ECEC SYSTEM
Governance and funding model	**Highly decentralised funding governance.** Provider coverage is **mainly public,** with provinces funding both private non-profit charity-affiliated providers and municipalities. **Funding is input-based and tax-based, supplemented by earmarked special-purpose grants.** The role of private finance is very limited. Public funding accounts for 91.9% of the ECEC ecosystem.
Supply-side tools	**Some professionalisation,** with national entry routes and curricula. **Financial support for students** includes study grants and boarding subsidies. **CPD provision is province-based, often free or low-cost. Minimum wage policy** for private ECEC centres (40h/week).
Demand-side tools	**Free half-day (20h/week)** at kindergarten in final year before primary school (age 5). **Small parental fees** apply for meals, extra activities and hours beyond the free entitlement.
Major policy shifts	**Amendment to 15a agreement (2022):** extra €200m/year (2022–2027) in earmarked federal transfers to provinces.

Eligibility model timeline

Age range	Explanation
0–5 years	**Paid provision:** means-tested parental fees ranging from €40 to €440 per month, plus additional charges. Fees depend on the province's governance.
5–6 years	**Free half-day (20h/week) at kindergarten:** universal and compulsory. Parents may pay fees for meals, extra activities and hours beyond free entitlement. Fees depend on the province's governance.
6+ years	**Free compulsory education (primary school)**

Country profile 2: Denmark

Overall ECEC structure

Denmark has a fully integrated ECEC system, meaning that: (1) the entire ECEC sector falls under the responsibility of a single authority, the Ministry of Children and Education, which sets the framework legislation; (2) children are entitled to an ECEC place from a very early age (6–18 months); (3) the minimum educational requirement to be an ECEC practitioner in Denmark, for all age groups, is a bachelor's degree; and (4) there are standardised educational guidelines[11] for the entire ECEC phase (European Commission, 2025).

In Denmark, ECEC covers ages 0 to 6 (i.e. up to the start of primary education). Within this age range, the Danish system offers a mix of ECEC settings and services for parents to choose between: (1) home-based provision, available from the end of parental leave until a child turns 6; (2) age-integrated institutions – unitary settings – for children up to age 6; and (3) separate settings (nurseries and kindergartens) for children under and over the age of 3 (European Commission, 2025, p. 195).

The proportion of Danish GDP spent on ECEC services is around 1.2% (Women's Budget Group, 2023). The country stands out for having one of the highest levels of investment in the very early years (under age 3), accounting for 0.8% of its GDP (Women's Budget Group, 2023). In 2023, at least 70% of under-3s participated in ECEC services (European Commission, 2025, pp. 14, 195). There is no ECEC gap in Denmark: parents have access to subsidised ECEC from around the end of their parental leave (European Commission, 2025, pp. 13, 195).

Funding is mainly public, directly supporting the ECEC sector and ensuring an adequate supply of available places. In Denmark, every child is legally entitled to an ECEC place, meaning that public authorities must guarantee a place for children in the relevant age range if parents request it (European Commission,

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[11] *Having standardised educational guidelines in this context means that the system can better support a smooth transition between care-centric provision and education-centric provision, and that the curriculum is better established throughout the entire ECEC phase, without prioritising a specific age range (European Commission, 2025, p. 18).*

2025, p. 51). ECEC participation among children aged 3 or over is currently above 96% (European Commission, 2025, p. 14, 195).

Funding governance

Denmark's funding model for ECEC provision is input-based. The main financial instruments are: (1) municipal subsidies, originating in the central state's annual block grants and representing at least 75% of the funding distribution (Eurydice, 2025a). Block grants usually have a broad and flexible mandate for use, allowing municipalities to allocate resources according to local needs (Villsen, 2024); and (2) fixed parental fees, representing up to 25% of the funding distribution (Eurydice, 2025a).

While legal governance is centralised under the Ministry of Children and Education, funding governance is decentralised. The state has overall responsibility to provide financial resources. However, it is the duty of municipalities to manage and allocate these resources, and to organise and monitor ECEC providers so as to meet local needs (European Commission, 2025, p. 195).

Provider coverage in Denmark is mainly public. Municipality-run facilities are the primary provision model, with public daycare facilities making up 28.84% of provision for 0–2s and 61.3% for 3–5s in 2022 (Eurydice, 2025b). Home-based provision accounts for 9.85% (as of 2022; Eurydice, 2025b) of provider coverage and is also mainly publicly funded, since private childminding is not the norm (Eurydice, 2025b; Early Childhood Ireland, 2023). Private daycare facilities make up a non-negligible proportion of coverage – 2.1% (2021) for 0–2s and 6.4% (2021) for 3–5s (Villsen, 2024). They are usually operated by non-profit organisations.

As regards major recent policy shifts, in 2025 a new law came into force that introduces mandatory child–staff ratios in ECEC settings: three children per caretaker for children aged 0–2, and six children per caretaker for children aged 3 to school-starting age. The municipalities will receive additional funding to comply with the new law, so that no additional pressure is placed on families (European Commission, 2025, p. 195; Villsen, 2024). In home-based provision, a childminder may not care for more than five children. If there is more than one childminder, the municipality may decide to increase the number of children permitted to ten (Eurydice, 2025b).

Eligibility model and accessibility tools

In Denmark, all children are legally entitled to a place in an ECEC facility from a very early age (6–18 months) (Villsen, 2024). However, legal entitlement is not the same as free of charge.

On the demand side, the maximum fee is capped and parents can access up to a 100% discount; the full discount is available to households whose income is below €2,076/month (Eurydice, 2025c). Single-parent and sibling discounts are also available (Villsen, 2024). Denmark also stands out for its strong culture of parental associations. One such association, the FOLA, represents parents' interests in joint policymaking processes alongside the government and other key stakeholders in order to ensure high-quality, affordable care (FOLA, 2025; Early Childhood Ireland, 2023).

In terms of supply-side tools to fund and support ECEC provision, Denmark has a specific publicly funded career path for ECEC teachers. A 'pedagogue' is someone holding a degree in social education. Their training blends academic attainment with practice and requires 3.5 years of study, comprising roughly 2.5 years of classroom-based education, a shorter three-month internship and two longer internship periods of six months each. Students facing financial constraints can apply for public financial support, and they also receive a salary for the two final internships (Villsen, 2024). Being a pedagogue is different to being a childminder, with no mandatory qualifications or CPD requirements for the latter in Denmark (Early Childhood Ireland, 2023).

There is a high level of municipal support for recruitment and retention, which promotes workforce sustainability. In the childminding sector, municipalities organise care when staff are sick and assign children to substitute childminders. Additionally, childminders have structured work conditions, with up to 48 working hours a week, and are entitled to seven weeks of annual leave (Early Childhood Ireland, 2023).

The Danish childminding community also has a labour union known as the FOA, which represents public-sector workers, including childcare workers and non-qualified/low-skilled staff. Alongside providing advocacy services, such as work and payment negotiations, the FOA also provides professional development and legal advice to its members, as well as financial support through an unemployment insurance fund (*a-kasse*) (FOA, 2025; Early Childhood Ireland, 2023).

Summary table: Denmark’s ECEC system

CATEGORY	DENMARK’S ECEC SYSTEM
Governance and funding model	**Funding governance is decentralised and input-based.** State provides overall financial resources; municipalities manage and allocate them. Funding is a mix of **municipal subsidies** (flexible annual block grants from central government, ≥75% of costs) and **fixed parental fees** (≤25%). **Provider coverage:** mainly public – municipality-run facilities dominate. Home-based care accounts for 9.85%, also mainly publicly funded. Private provision is limited and mostly non-profit; the role of private finance is virtually non-existent.
Supply-side tools	**Publicly funded professional route for ‘pedagogues’** – degree in social education, 3.5 years of study, combining academic study with internships. Public financial support available. No mandatory qualifications or CPD for childminders. **Municipalities support workforce sustainability** through structured working conditions and arrangements for the childminding sector. **FOA:** trade union for public-sector childcare workers and low-skilled staff.
Demand-side tools	**Capped parental fees** (max. 25% of costs). **Fee discounts of up to 100% for low-income families** (income threshold: €2,076/month). Additional discounts for **single parents** and **siblings.** Strong advocacy by the parental association **FOLA.**
Major policy shifts	**2024 law on minimum child–staff ratios** (came into force in 2025): max. 3 children per caretaker for ages 0–2; max. 6 children per caretaker for ages 3–start of school. Additional funding to enable municipalities to comply without increasing the costs for families.

Eligibility model timeline

Age range	Explanation
0–3 years	**Capped fees in unitary settings, nurseries for under-3-year-olds and municipal childminding:** parents pay a fixed amount, covering 25% of the operational costs. Universal entitlement begins at 6 months, overlapping with parental leave. Discounts up to 100% are available for those on low incomes. Single-parent and sibling discounts are also available.
3–6 years	**Capped fees in unitary settings, kindergartens for over-3-year-olds and municipal childminding:** parents pay a fixed amount, covering 25% of the operational costs. Discounts up to 100% are available for those on low incomes. Single-parent and sibling discounts are also available.
6+ years	**Free compulsory education (primary school)**

Country profile 3: Finland

Overall ECEC structure

Finland has a fairly integrated governance system, in which a single authority – the Ministry of Education and Culture – has primary responsibility for the ECEC sector and services are mainly delivered in unitary settings with mixed age groups (EASNIE, 2020; European Commission, 2025, pp. 16, 217). The official Finnish ECEC model is named 'Educare'. This is an integrated approach to care, education and teaching, with an emphasis on learning through play (EASNIE, 2023). In Finland, children in a single ECEC setting may range in age from 0 to 7 years (Eurydice, 2025a).

There are two kinds of full-time ECEC settings in Finland (which are offered by both public and private providers): early education centres and family daycare (European Commission, 2025. p. 217; Eurydice, 2025a). Family daycare is provided from ages 0 to 6, either in the childminder's own home or at a location designated by the municipality (European Commission, 2025, p. 217; Eurydice, 2024a). However, the majority of children are enrolled in municipal early education centres, which cover the 0–7 age range (European Commission, 2025, p. 217; Eurydice, 2025a). Finnish children aged between 6 and 7 must attend a compulsory pre-primary programme at an early education centre or primary school. The pre-primary programme is part-time and takes place over the course of the school year. Children enrolled in the pre-primary programme are also entitled to attend complementary paid ECEC services (European Commission, 2025, p. 217; Eurydice, 2025b).

In the Finnish system, there is no ECEC gap, which means children are entitled to an ECEC place around the end of their parents' childcare leave (European Commission, 2025, p. 13). The legal entitlement, which starts as early as the age of 9 to 10 months, does not guarantee free access to services. However, as outlined below, the Finnish system is highly subsidised, with demand-side tools ranging from capped fees to family allowances to ensure families can access affordable care. Funding is only universal and compulsory at ages 6 to 7 (i.e. in the pre-primary school year). Public expenditure on ECEC services is high, reaching 1.14% of Finnish GDP in 2021 (European Commission, 2025, p. 46).

Funding governance

Finland's ECEC funding model is input-based and mainly public. ECEC is jointly funded by the state, municipalities and families, and falls under 'basic services' that must be provided by municipalities, alongside youth and cultural services and basic education.

For ECEC services specifically, around 30% of the funding comes from government transfers to municipal basic services[12] (Eurydice, 2025b). The remaining funding for ECEC provision comes from municipal taxes (56%) and fees collected from families (14%) (Eurydice, 2025b). ECEC funding in Finland is thus highly decentralised. Municipalities have a statutory duty to raise and manage funding. On average, approximately 26% of municipalities' overall educational budget goes on ECEC services (Eurydice, 2025b). The federal government still plays a role by transferring non-earmarked resources, which means that municipalities have autonomy over how to allocate funds (Eurydice, 2025a; 2025b).

Provider coverage is also mainly public, with 82% of children attending municipal ECEC and only 19% attending privately run facilities (Eurydice, 2025a). According to the European Commission (2025, pp. 47–48), the independent private sector is virtually non-existent in Finland, with all centre-based ECEC initiatives being at least 50% publicly funded. Early education centres with mixed age groups – unitary settings – are the main type of provision (95%), while home-based family daycare accounts for the remaining 5% (Eurydice, 2025a). The use of private finance is not common, despite some pioneering initiatives, such as Finland's first education-sector PPP, a €90 million funding package for nursery and school infrastructure supported by the European Investment Bank (EIB, 2020).

[12] *The exact amount of state funds allocated to each municipality is more precisely determined by the share of residents aged between 0 and 6.*

Eligibility model and accessibility tools

The Finnish system legally entitles all children to an ECEC place at the age of 9–10 months; however, parents may still need to pay fees. Demand-side tools to support ECEC funding include parental fees proportional to family size and income. Fees are capped and range from €0 to €311 per month for full-day provision. They include meals and learning materials (Eurydice, 2024b; 2025b). Parents can also opt to access private ECEC services with state support, by applying for the private statutory childcare allowance alongside municipal subsidies (Eurydice, 2025a; 2025b).

Funding is only universal at the age of 6 to 7, the final ECEC year in Finland when children must complete the compulsory pre-primary year of education. Provision is free for half a day – four hours a day/20 hours per week – and learning materials and daily meals are included (Eurydice, 2024a). Parents need to pay for additional complementary ECEC services if extra care is needed (Eurydice, 2025b). However, few families pay the maximum fee and around 50% of children access completely free ECEC services (Eurydice, 2024a).

In terms of supply-side tools to support workforce development, the Finnish government funds the training of ECEC practitioners through universities' core budgets, meaning that the country formally recognises training as integral to public higher education (Chydenius, 2024). However, educational funds are not earmarked. That may create internal budget competition within universities, which have autonomy to allocate funds according to their needs (Chydenius, 2024). The ECEC workforce is institutionalised in Finland, with well-established credentials and professional routes. To become a practitioner, a bachelor's degree in early childhood education is necessary. Postgraduate qualifications in ECEC studies are also available. Vocational qualifications in social services, typically attained at the upper secondary educational level, offer an alternative route to becoming an ECEC assistant (Chydenius, 2024).

Additionally, the Finnish National Agency for Education organises state-funded CPD programmes for ECEC practitioners. Those initiatives can be delivered by a variety of institutions, including municipalities and/or municipal associations, universities, registered communities and foundations. The providers are selected through a public bidding process, and the training is based on needs assessments carried out in collaboration with the Finnish Education Evaluation Centre (FINEEC) (Chydenius, 2024, p. 21).

Finland stands out for its strong emphasis on continuing professional development of its ECEC workforce. Currently, at least one-third of staff at an ECEC centre must be qualified ECEC teachers (minimum qualification: bachelor's degree) and up to two-thirds can be ECEC childcarers/assistants with an ISCED 3 qualification.[13] Following a 2018 change to ECEC legislation – the Act on Early Childhood Education and Care (540/2018) – the country's target is for at least two-thirds of staff at ECEC centres to be ECEC teachers or social pedagogues specialised in ECEC with ISCED 6 qualifications by 2030. Other staff members must as a minimum be qualified as ECEC childcarers (European Commission, 2025, p. 217).

There are also ongoing efforts to enhance labour organisation and improve sector-wide conditions. One example is the 2024 collective agreement for the private ECEC sector (OAJ, 2024). Other major policy shifts include: (1) the Right to Learn project (2020–2022), involving €313 million in national investment for ECEC development (Chydenius, 2024), and (2) a two-year pre-primary trial, running from 2021 to 2024, aimed at evaluating the advantages of extending the pre-primary period by one year and including 5-year-olds in the compulsory programme (European Commission, 2025, p. 217).

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[13] *'ISCED 3 qualification' refers to the 'Upper Secondary Education' level in the International Standard Classification of Education (ISCED) system.*

Summary table: Finland's ECEC system

CATEGORY	FINLAND'S ECEC SYSTEM
Governance and funding model	**Highly decentralised and input-based.** Municipalities have a statutory duty to raise and manage ECEC funding. Federal government transfers (30%) complement municipal tax revenue (56%) and family fees (14%). **Provider coverage:** predominantly municipal (82%) with a minor role for private providers, mostly non-profits; the independent private sector is essentially non-existent. **Role of private finance:** minimal; rare exceptions include Finland's first education-sector PPP (€90m for nursery and school infrastructure, EIB-supported). State transfers to municipalities are **not earmarked,** giving local autonomy.
Supply-side tools	**ECEC teacher training funded through universities' core budgets** (not earmarked, potentially leading to internal competition). Minimum qualification to be a core ECEC practitioner is a **bachelor's degree** or equivalent. **State-funded CPD programmes** delivered by municipalities, universities, registered communities and foundations, selected via public procurement and based on needs assessments by the Finnish Education Evaluation Centre (FINEEC).
Demand-side tools	**Parental fees proportional to family size and income,** capped at **€0–€311/month** (full day, including meals and materials). ~50% of children access free ECEC. Children entitled to a place around the end of parental leave; fees still apply unless exempt. **Private ECEC available, with a state childcare allowance and municipal subsidies.**
Major policy shifts	**2024 collective agreement** improving conditions in the private ECEC sector; **Right to Learn project** (2020–2022, €313M investment in ECEC development); **Act on Early Childhood Education and Care** (540/2018) strengthening planning and funding systems.

Eligibility model timeline

Age range	Explanation
0–6 years	**Capped fees for family daycare (home-based) or early education centres (unitary settings):** parental fees are proportional to family size and income, capped at €0–€311/month (full day, including meals and materials). Universal entitlement begins at 9–10 months, overlapping with parental leave. Private ECEC is available, with a childcare allowance and municipal subsidies.
6–7 years	**Universal provision in the final ECEC year.** At the age of 6, children must complete a compulsory pre-primary programme before starting primary school. Provision is free for half a day (4 hours per day; 700 hours per year) and meals and materials are included. Parents need to pay for additional ECEC services outside of the entitled hours.
7+ years	**Free compulsory education (primary school)**

Country profile 4: France

Overall ECEC structure

The ECEC sector in France has a split governance structure, with services provided in separate settings for younger and older children: (1) care and social services for children aged 0 to 3, under the jurisdiction of the Ministry of Solidarity. These services primarily comprise childminding (*assistant(e)s maternel(le)s*) and *crèches*; (2) education and care services for children aged 3 to 7 years, under the jurisdiction of the Ministry of National Education. The main service is the formal, compulsory pre-primary education offered by nursery schools (*écoles maternelles*) (European Commission, 2025; Eurydice, 2023; Pétreault, 2023). Although compulsory pre-primary education formally starts at age 3, admissions at age 2 are possible and encouraged, especially in economically vulnerable areas. In 2022, 10.3% of 2-year-olds were enrolled in *écoles maternelles* (European Commission, 2025, pp. 35–36).

According to OECD data from 2023, public expenditure on ECEC provision in France is above 1% of the country's GDP, which is higher than the overall average in OECD countries of around 0.8% (OECD, 2023b). Despite that, the country has a significant ECEC gap of more than two years during which parents cannot access subsidised care provision after the end of parental leave (European Commission, 2025, p. 58). Very early years education (0–3 years) is in general not free of charge (European Commission, 2025, p. 58). However, France has a complex system of subsidies and family benefits to enhance accessibility to families, which are outlined below. From age 3 (or, in exceptional cases, from ages 2 or 2.5) to age 7, the last year of ECEC before primary school, it offers 23 hours per week of free, compulsory ECEC (European Commission, 2025, p. 54).

Funding governance

Funding for ECEC provision for children aged 3+ mainly comes from public sources, with the independent private sector playing a minor role. 86.1% of ECEC places are public, 13.4% are private but government-dependent and 0.4% are private and independent (European Commission, 2025, p. 48). Private, government-dependent institutions are almost exclusively non-profit (most are Catholic organisations). For-profit providers for this age range are virtually non-existent (Weghmann et al., 2024; EASNIE, 2023; Naumann et al., 2013). However, there has been a notable structural shift since the liberalisation of the market in 2004, with continuous growth of the for-profit sector. Recent studies estimate that for-profit providers now account for around 9% of formal childcare places for children under the age of 3 (Weghmann et al., 2024).

The state covers the majority of staffing costs for public nurseries (*écoles maternelles*) and primary schools, while municipalities manage infrastructure and maintenance costs. France operates under a management structure known as *régie directe municipale*, which means that funding is not only provided but also for the most part managed at municipal level (European Commission, 2025; Eurydice, 2023; Pétreault, 2023).

Eligibility model and accessibility tools

As outlined above, the French eligibility model offers a guaranteed place in subsidised, compulsory ECEC services from ages 3 to 7 (European Commission, 2025, p. 51). Families may pay adjusted fees for meals, after-school care and any other additional expenses such as school insurance. What families pay is means-tested and so depends on household income (Eurydice, 2023).

Infant care services for children under 3, such as crèches, licensed childminders and family-based care, are usually paid by families (European Commission, 2025, p. 58). However, the French government has a robust funding support system to help families access care in the very early years. For example, families with children under 6 years old can claim a tax credit covering 50% of eligible childcare expenses, up to a maximum of €3,500 per child annually (FrenchTaxOnline, 2024). Families can also receive financial support through national and local family allowance funds (CNAF/CAFs), which directly process applications and distribute benefits to eligible households (CNAF, n.d.).

France also provides the Childcare Free Choice Supplement (CMG), a core means-tested subsidy that helps families cover childcare costs (childminders/crèches) for children under 6 (Directorate for Legal and Administrative Information, 2025). Public spending on family benefits makes up close to 3.5% of French GDP, and tax breaks for families more than 0.5% (OECD, 2023a). Those social policies contribute to France having a high rate of ECEC enrolment in the very early years (0–2), with that figure standing at 57.86% in 2022 (OECD, n.d.).

Access to ECEC in the very early years can also be facilitated by non-profit providers run by parents' associations and social sector groups, which account for over 40% of childcare provision in the 0–2 age range, often supported by government subsidies and social investments (Weghmann et al., 2024; Rayna, 2024; EASNIE, 2023; Naumann et al., 2013). Additionally, children can be admitted to publicly subsidised ECEC at an early age, depending on family circumstances (European Commission, 2025, pp. 35–36; Rayna, 2024).

In terms of supply-side tools to enhance ECEC funding and workforce development, France provides a Personal Training Account (*compte personnel de formation*) that is annually credited with up to €500 of funds, or €800 for low-qualified employees, to pay for certified CPD courses. It is primarily financed by employer contributions through a mutualised tax and managed independently of employers (Rayna, 2024). Eighteen hours of CPD per year is compulsory and publicly funded by the Ministry of National Education. This compulsory CPD can, subject to employer approval, be done during working hours with continued pay (Rayna, 2024). France also has a highly institutionalised ECEC workforce, with well-defined credentials, qualification requirements and regulatory standards as well as publicly funded training/university courses (Rayna, 2024). The minimum educational requirement to be a core ECEC practitioner in France is a bachelor's degree (ISCED 6) (European Commission, 2025, p. 82).

France has introduced various reforms to attract more ECEC staff, enhance training and address severe staff shortages. *Ambition Enfance Égalité*, for instance, is a national annual training plan for all childcare workers, launched as part of President Emmanuel Macron's wider Anti-Poverty Plan in 2017 (Rayna, 2024). Other major policy shifts include: (1) the CMG Reform (2025), which introduces adjustments to the subsidised childcare system for age groups outside the universal ECEC provision. More personalised calculations are expected to better support families (Directorate for Legal and Administrative Information, 2025); and (2) the COG État CNAF 2023–2027, a multi-year formal agreement between the

French state and the National Family Allowances Fund (CNAF) that establishes a public early childhood service system. It aims to mobilise a total of €6 billion across the period to develop the sector (Ministry of Labour, Health, Solidarity and Families, 2023).

Summary table: France's ECEC system

CATEGORY	FRANCE'S ECEC SYSTEM
Governance and funding model	Funding governance is **mainly public, input-based and decentralised,** with staffing costs covered by the state and operational costs by municipalities. **Split legal governance:** (1) education and care (Ministry of National Education); (2) care and social services (Ministry of Solidarity). **Provider coverage:** over 80% are public institutions; the private sector is dominated by non-profit, government-dependent organisations (mostly Catholic). The private sector is still small but growing (especially for under-3s provision).
Supply-side tools	**Personal Training Account (*compte personnel de formation*):** up to €500/year (€800 for low-qualified employees) for certified CPD, financed by employer contributions. **18 hours/year of compulsory CPD, publicly funded by Ministry of National Education,** during work hours with continued pay (subject to employer approval). **Highly institutionalised ECEC workforce** (minimum educational requirement: bachelor's degree).
Demand-side tools	Means-tested family payments and tax relief: (1) **childcare tax credit:** covers 50% of eligible childcare expenses (under age 6), up to €3,500/child annually; (2) subsidies via **family allowance funds (CNAF/CAFs)**; (3) **Childcare Free Choice Supplement (CMG):** means-tested support for care by childminders or crèches. Public spending on family benefits ~3.5% of GDP; tax breaks ~0.5% of GDP. Over 50% enrolment rate for ages 0–2 (57.86% in 2022).
Major policy shifts	**Ambition Enfance Égalité:** national annual training plan for childcare practitioners; **CMG Reform (2025)** to personalise subsidies outside universal provision; **COG État CNAF 2023–2027:** multi-year formal agreement to mobilise funding to the ECEC sector (€6 billion across the period).

Eligibility model timeline

Age range	Explanation
0–3 years	**Paid provision with tax relief mechanisms and family subsidies.** Families can access care for children under 3 through the childcare tax credit, family allowance funds (CNAF/CAFs) and the Childcare Free Choice Supplement (CMG). Early admission in the subsidised ECEC ecosystem (for children between 2 and 2.5 years) is possible depending on a family's economic circumstances.
3–6 years	**Universal, guaranteed place in publicly subsidised ECEC from age 3.** Compulsory pre-primary education. Families pay means-tested fees for meals, after-school care and extras.
6+ years	**Free compulsory education (primary school)**

Country profile 5: Italy

Overall ECEC structure

The Italian system is undergoing a significant transformation under the national strategy Sistema Integrato 0–6 (‘Integrated System 0–6’). This strategy, established by Legislative Decree 65/2017, aims to create a single, continuous pedagogical path from birth to age 6, harmonising the historically separated welfare-oriented services for children aged 0–3 and the education-focused pre-primary school services for children aged 3–6 (Eurydice, 2024a; 2024b). Italy’s ECEC governance is now legally integrated so that a single authority is responsible for regulation of the sector, but funding and operations are decentralised. While the Ministry of Education and Merit (MIM) sets the national framework and allocates strategic funds, municipalities (*comuni*) are the key operational actors. They manage local funds, run public services and contract private providers, which leads to significant variation in service availability and cost across the country (Mantovani & Pavesi, 2021; Zeroseiplanet, 2018). Attendance of ECEC services is not compulsory in Italy. Compulsory education starts at age 6 (European Commission, 2025, p. 203).

In the Sistema Integrato 0–6, service delivery is divided between: (1) nursery settings (*nidi d’infanzia*) for children under 3. Provision for this age range is on-demand, often rationed due to supply shortages and typically requires means-tested parental fees (Eurydice, 2024a; 2024b; ISSA, n.d.); and (2) kindergarten settings/pre-primary schools (*scuola dell’infanzia*) for children aged 3–6. Provision for this age range is part of the national education system. It is free of charge in state-run schools and has near-universal enrolment (Eurydice, 2024b; 2024c; ISSA, n.d.). Home-based ECEC plays only a minor role in Italy (European Commission, 2025, p. 37). Italy’s public expenditure on early childhood education (ISCED 0) was ~0.4–0.5% of GDP in 2022 (Eurostat, 2025).

Funding governance

The ECEC funding model in Italy comprises a multi-level, input-based, mixed-source system. It is primarily financed through general taxation at the state, regional and municipal levels (Eurydice, 2023; Conferenza Stato-città ed autonomie locali, n.d.). For the 0–3 age group, the funding system is decentralised, with municipalities in charge of direct management and outsourcing. They receive transfers and subsidies from the regions and earmarked funds from the state. These state funds can come from Italy's Recovery and Resilience Plan (PNRR) – explained below – and/or from the Fondo Nazionale (Sistema Integrato 0–6) (Eurydice, 2024b). The ECEC system for under-3s in Italy is also funded by fees from families, which can be offset by subsidies and family benefits (Eurydice, 2024b), as discussed below.

The private sector is the dominant provider for the 0–3 age group, accounting for two-thirds (66.6%) of total services, with publicly owned (*titolorità pubblica*) facilities making up the remaining 33.4%. There is a significant trend of outsourcing within the public system, where over half of the publicly owned centres (55.8%) are managed by private entities, mostly non-profits. Furthermore, nearly half of all private providers (46.3%) have formal agreements (*convenzionamenti*) with municipalities, reserving some or all of their spots for children on public waiting lists (Dipartimento per le politiche della famiglia et al., 2024).

For the 0–3 age group, both public and private services receive government funds, but families pay fees, possibly with discounts depending on income. For the 3–6 age group, public pre-primary schools are free and funded by the state; private schools deemed officially equivalent receive public funds plus fees from families, while non-equivalent private schools rely fully on family fees.

Public and officially equivalent private schools for 3 to 6-year-olds are thus directly funded by the state. This state funding mainly covers administrative and staffing costs, such as salaries. Meanwhile, regions provide complementary services (e.g. canteens, transport, textbooks and social health support) and municipalities cover infrastructure costs (e.g. heating, lighting and building construction/maintenance). So, while the funding flow within the very early years (0–3) is spread across different government levels, from age 3 onwards funding becomes more straightforward, flowing directly from the state to schools (Eurydice, 2023; 2024a; 2024b; Istat, 2025).

The 3–6 sector is dominated by state-run schools, complemented by a substantial share of state-accredited non-profit schools (*scuole paritarie*) (Eurydice, 2024c). The role of private finance is expanding but bifurcated: development banks, such as the European Investment Bank (EIB), provide large-scale loans for public infrastructure, while private equity funds are acquiring premium, high-fee international school groups. This creates a parallel market that operates largely outside the public funding system (EIB, n.d.; Zhou, 2025).

The most significant recent policy shift is the National Recovery and Resilience Plan (PNRR), a massive, centrally driven investment programme. The PNRR originally allocated about €4.6 billion to expand ECEC places, with an initial target of ~264,000 places, but the targets and funding were subsequently revised. The PNRR contribution was adjusted to roughly €3.24 billion for the new places measure, with additional national funds bringing total public financing to ~€4.57 billion, while the current official implementation target is at least 150,480 new places (Ita-lia Domani, n.d.-b).

Eligibility model and accessibility tools

Overall, the Italian eligibility model for accessing ECEC services is as follows: (1) for ages 0–3, families pay for enrolment and attendance fees. However, fees are capped, with the maximum threshold set by the state and regions (Eurydice, 2024a) according to local needs; (2) for ages 3–6, attending ECEC is free (though not compulsory). Families may pay fees for other services, such as transport and canteens. However, socioeconomically vulnerable families are usually exempted (Eurydice, 2024a).

The primary demand-side tool in Italy is the Bonus Asilo Nido (‘childcare allowance’), a national cash-for-care reimbursement for nursery fees. The amount received varies based on a family’s economic status, as measured by the Equivalent Economic Situation Indicator (ISEE). This makes it a highly targeted, progressive subsidy (INPS, 2024). The 2024 Budget Law raised the maximum childcare allowance to €3,600 per year for a child born on/after 1 January 2024, provided the household's ISEE is ≤€40,000 (minorenni[14]) (INPS, 2025). Parents may claim a 19% personal income tax deduction (IRPEF) on eligible education/childcare expenses, subject to service-specific caps: for nursery settings (ages 0–3) the deductible ceiling is €632 per child per year, and the maximum tax benefit ~€120; for kindergarten settings (ages 3–6) the cap is typically up to €800. The deduction is incompatible with amounts already reimbursed through the Bonus Asilo Nido, which means families cannot double-dip by claiming the deduction and the allowance for the same expenses (Agenzia delle Entrate, 2023).

Qualification requirements for Italy's ECEC workforce are split by age group: the standard entry qualification for educators working in 0–3 services is a three-year bachelor's degree in educational sciences (*laurea triennale*, ISCED 6) with an early childhood pathway (Ministero dell'Istruzione e del Merito, 2021; Parlamento Italiano, 2017). Teachers in pre-primary education (ages 3–6) qualify through a single-cycle five-year university degree (*laurea magistrale a ciclo unico*, 300 CFU) that covers child development, pedagogy and didactics, inclusive education and supervised teaching practice. These qualifications are publicly funded (Eurydice, 2024d; Picchio & Bove, 2024; Università degli Studi di Foggia, 2025).

[14] *'Minorenni' refers to a specific ISEE band that provides the highest levels of benefits. Other ISEE bands receive different (lower) amounts (INPS, 2025b).*

Summary table: Italy's ECEC system

CATEGORY	ITALY'S ECEC SYSTEM
Governance and funding model	**Highly decentralised governance with central guidance** (Ministry of Education). A mixed, input-based funding model combining public funds (state, regional, municipal taxes) and private fees. Main financial instrument is tax revenue. Funding governance is more decentralised for under-3s care, spread across different government levels. Pre-primary schools (3-6) are directly funded by the state.[15] System relies on direct supply-side funding and targeted demand-side subsidies.
Supply-side tools	**Publicly run schools have capped fees for under-3s,** set according to local needs. **Workforce professionalisation:** mandatory university-level qualifications for educators/teachers (bachelor's for 0–3 educators, single-cycle degree for 3–6 teachers), publicly funded.
Demand-side tools	**Bonus Asilo Nido:** a national, means-tested cash transfer for nursery fees, tiered by family ISEE. As of 1 January 2024, families with an ISEE ≤€40,000 **whose child was born on or after 1 January 2024** and who also have another child under age 10 receive up to €3,600 per year; for children born before this date, the maximum remains €3,000 (or less depending on ISEE). **Tax relief:** 19% IRPEF deduction on eligible education/childcare expenses – cap is €632 for nursery settings and €800 for pre-primary settings; not combinable with the Bonus Asilo Nido.
Major policy shifts	**National Recovery and Resilience Plan (PNRR) (2021–2026):** centrally driven investment programme to expand ECEC supply; adjusted to ~€3.09 billion PNRR contribution (total public funding: ~€4.57 billion), with a target of 150,480 new places. Implementation of the Sistema Integrato 0–6 (ongoing): national pedagogical guidelines and unified framework. **Enhanced Bonus Asilo Nido (2024):** increased allowance for eligible families.

Eligibility model timeline

Age range	Explanation
0–3 years	**Paid provision with tax relief mechanisms and family subsidies.** Families can access care for under-3s **subject to capped fees,** which are locally set depending on needs. A **childcare allowance** (Bonus Asilo Nido) is also available, which is adjusted to families' socioeconomic status according to the Equivalent Economic Situation Indicator (ISEE).
3–6 years	**Free of charge.** Parents may pay small fees for additional services (meals and transport). Vulnerable families are usually exempted. ECEC is neither compulsory nor a legal entitlement in Italy, yet it still has almost universal enrolment.
6+ years	**Free compulsory education (primary school)**

[15] *True for all state-recognised schools, even private ones. Private schools can receive part of the funding at par with others, but they also receive funding from their parent NGO, church or board. These schools also charge higher fees than purely state-run schools.*

Country profile 6: Lithuania

Overall ECEC structure

Lithuania's ECEC system is divided into a largely non-compulsory pre-school phase (*ikimokyklinis ugdymas*) for children aged 0 to 6 and a compulsory, state-funded pre-primary year (*priešmokyklinis ugdymas*) for children in the final year before primary school, when they are typically aged 6. ECEC in the first phase is usually delivered in unitary pre-schools, while the pre-primary groups are held either in ECEC settings or schools (European Commission, 2025, p. 206; Eurydice, 2023). There is no publicly regulated home-based pre-school provision (Eurydice, 2023).

Legal governance is centralised in the Ministry of Education, Science and Sport, establishing a partially integrated governance system. However, funding and operational governance is decentralised (ISSA, 2021; European Commission, 2025, p. 25). The compulsory pre-primary year follows a stricter, centrally approved national framework, whereas the pre-school phase is more flexible and providers are free to design their own curriculum, following general educational guidelines (Eurydice, 2023).

Estimated public spending on education in Lithuania was around 4.9% of GDP in 2022, placing it a little higher than the EU average (4.7%) (Directorate-General for Education, Youth, Sport and Culture (European Commission), 2024). Lithuania's public expenditure on early childhood education (ISCED 0) was ~0.99% of GDP in 2022 (Eurostat, 2025).

Funding governance

The Lithuanian funding model is a mixed, input-based and highly decentralised system, with responsibilities shared between the central government and local municipalities (Eurydice, 2024b). The state, through the Ministry of Education, Science and Sport, provides the *klasės krepšelis* (literally 'class basket'), a grant allocated to a class or kindergarten group. The amount of funding is calculated according to teaching costs as well as the number of children and the hours needed to implement the education plan (Eurydice, 2024b). This grant can be allocated to state, municipal or private settings[16] (Eurydice, 2024b). Avoiding overcrowded classes and providing financial stability to smaller schools are key priorities for Lithuania (Eurydice, 2024b).

The state allocates approximately 80% of the *klasės krepšelis* to schools. Almost all of this funding is used for salaries. A small percentage is intended for other educational needs, such as textbooks and other educational supplies. Remaining funds may also support national minority languages and/or multilingual environments, improving teachers' qualifications and the use of ICT (Eurydice, 2024b).

The remaining 20% of the *klasės krepšelis* goes to municipalities, which may allocate these resources subject to government requirements. For example, 100% of funds must be used for 'educational aid and the implementation of curricula supplementing formal education' (Eurydice, 2024b). That means providing financial support for children with special educational needs and learning difficulties, for the assessment of learning progress and achievements and for extracurricular activities (Eurydice, 2024b). Municipalities must also provide ECEC providers with 'housekeeping funds' from their own budgets for any operational and maintenance costs not covered by the *klasės krepšelis*, such as building upkeep and utilities (Eurydice, 2024b).

Provider coverage comprises a mix of public (state and municipal) and private (non-state) institutions. In the pre-school phase, ECEC is provided by state and municipal kindergartens or in private ECEC settings (Eurydice, 2023). In the compulsory pre-primary phase, it can be provided by various kinds of general education schools (Eurydice, 2023). Public educational institutions form the backbone of the ECEC system in Lithuania, accounting for 541 out of the 754 pre-school settings in the country (ISCED 0) (Eurydice, 2024c). However, particularly in urban areas, demand for public places often exceeds supply, leading to long waiting lists. This supply gap has fuelled a growing private sector where fees are

[16] *Public funding of private institutions recently caused social backlash in the country (LRT TV naujienų tarnyba, 2019).*

significantly higher (European Commission, 2025, p. 66). Nevertheless, there are no widely reported major private equity acquisitions in the Lithuanian ECEC sector as of 2025; the market consists of many small, independent providers. However, the use of state-backed municipal subsidies to support families using these private services creates stable revenue streams that could make the sector attractive for future financial consolidation.

Eligibility model and accessibility tools

The overall eligibility model in Lithuania is as follows: in both the pre-school phase (ages 0–6) and the compulsory pre-primary education phase (age 6), ECEC is free of charge for four hours a day/20 hours per week (European Commission, 2025, p. 61; Eurydice, 2024a). If parents require additional care hours, they need to pay fees. Parents and guardians also pay for their child's meals. However, since 2020/21, all children enrolled in the pre-school phase have been provided with a free lunch (Eurydice, 2024a). The fees for additional hours and meals are set by the ECEC provider, which is responsible for identifying cases where fees should be reduced or not paid at all. Municipalities can also play a role in decreasing fees for disadvantaged families or families with large numbers of children (Eurydice, 2024a; 2024b).

Another important demand-side tool in Lithuania is family subsidies. In some municipalities, parents whose child is not given a place in a public ECEC setting receive €120–€150 of financial support per month to cover the cost of private ECEC (European Commission, 2025, p. 63). The country also has one of the longest parental leave periods in Europe (1.5 years). This might explain the low participation rate in ECEC for under-3s, ranging between 10% and 20% (European Commission, 2025, pp. 76, 206). In contrast, the participation rate in ECEC for ages 3 and over is above 96% (European Commission, 2025, p. 77). The National Education Development Programme (2021–2030) is the most significant recent policy shift. It has set ambitious goals to increase the ECEC participation rate for children aged 3–6 to 95% and to develop a single national quality standard to be applied across all providers (Ministry of Education, Science and Sport of the Republic of Lithuania, 2021b; UNICEF, 2022).

A universal child benefit is also available, providing a direct monthly payment (€122.50/month in 2025) to all families regardless of income. Additionally, Lithuania pays a childcare compensatory allowance of 5.2 × BSB[17] (€364 in 2025) per month to one parent or the legal guardian for each pre-school-age child not attending kindergarten that is being cared for by a paid babysitter (Ministry of Social Security and Labour of the Republic of Lithuania, 2025).

In terms of supply tools, the state has established strong supply-side tools focused on workforce quality and infrastructure. A minimum of a bachelor's degree (ISCED 6) plus a pedagogical qualification is required for all ECEC teachers, meaning Lithuania has among the highest statutory qualification requirements of any European country (Eurydice, 2024d).

Major policy shifts are increasing access to ECEC and expanding legal entitlement requirements. The new Law on Education (Švietimo įstatymas) entitles 2-year-olds to a guaranteed place from 2025 (Eurydice, 2024a). Additionally, pre-school education can be made compulsory for some children, especially those from families identified as being at social risk; this is a targeted intervention aimed at breaking intergenerational cycles of disadvantage (EASNIE, 2023; Ministry of Education, Science and Sport of the Republic of Lithuania, 2021a). In circumstances where a child must undertake compulsory pre-school education, it is free of charge and free meals are also provided (Eurydice, 2024a).

[17] *Lithuania indexes many social benefits to the Basic Social Benefit (BSB), a statutory unit set by government each year (€70 in 2025) (Ministry of Social Security and Labour of the Republic of Lithuania, 2025).*

Summary table: Lithuania’s ECEC system

CATEGORY	LITHUANIA’S ECEC SYSTEM
Governance and funding model	Highly decentralised, mixed and input-based funding model with shared responsibility between the state (*klasės krepšelis*, educational grant), municipalities (operational funding) and families, through parental fees. **Provider Coverage:** A mixed system of public (municipal) and private (non-state) providers. Public kindergartens are the primary form of provision, with a growing private sector in urban areas. Publicly regulated ECEC cannot be provided in a home-based setting (Eurydice, 2023). **Role of private finance:** no widely reported major private equity acquisitions in the Lithuanian ECEC sector as of 2025.
Supply-side tools	**Workforce professionalisation:** high formal requirements, with a mandatory bachelor’s degree (ISCED 6) and pedagogical qualification for all ECEC teachers (Eurydice, 2024b).
Demand-side tools	**Universal child benefit:** 1.75 × BSB per month (€122.50 in 2025). New (2025) childcare compensatory allowance: 5.2 × BSB = €364/month paid to a parent/legal guardian for each pre-school-age child not attending kindergarten and cared for by a paid babysitter (Ministry of Social Security and Labour of the Republic of Lithuania, 2025). **Targeted subsidies:** municipal compensation (e.g. €100/month in Vilnius) for parents using private ECEC due to shortages in public provision. **Low public fees:** parental fees for public institutions are low and mainly cover meal costs, with waivers for vulnerable families.
Major policy shifts	**National Education Development Programme (2021–2030):** a strategic plan to increase ECEC participation to 95%, improve inclusion and develop a national quality standard (Ministry of Education, Science and Sport of the Republic of Lithuania, 2021b). **Compulsory ECEC for vulnerable children (2021):** ECEC attendance has been made mandatory for children from families identified as being at social risk (EASNIE, 2023).

Eligibility model timeline

Age range	Explanation
0–6 years	**ECEC is free of charge for 20 hours per week.** Non-compulsory pre-school phase, with legal entitlement at age 2 (2025). Parents pay fees for additional ECEC hours and meals; fees depend on the ECEC setting and municipality, though all children enrolled in the pre-school phase are provided with free lunches.
6–7 years	**ECEC is free of charge for 20 hours per week.** Compulsory pre-primary school year. Parents pay fees for additional ECEC hours and meals; fees depend on the ECEC setting and municipality.
7+ years	**Free compulsory education (primary school)**

Country profile 7: Portugal

Overall ECEC structure

Portugal's ECEC funding model is largely centralised: childcare for ages 0–2 is under the auspices of the Ministry of Labour, Solidarity and Social Security, while pre-school education for ages 3–6 is overseen by the Ministry of Education. Portugal has no legal entitlement to ECEC for children under 3, and demand outstrips supply in this age range. There is a legal entitlement for children aged 3 and over (pre-primary education); however, attendance is not compulsory. In 2022/23, the pre-primary attendance rate in Portugal for children aged 3 was 83% (Eurydice, 2025d).

The state supplies providers with a fixed subsidy for each child (€460 in 2022/23; Women's Budget Group, 2023), which is effectively a demand-side funding model. Other subsidies include a fixed annual state contribution of €304.23 (figure from 2022) for children aged under 3 attending a provider in the private non-profit network (see below) (Araújo, 2024). In recent years, there has been partial decentralisation at municipal level for some leisure activities (Schreyer et al., 2024).

Funding governance

Portugal's public ECEC services are predominantly funded at national level, supplemented by parental fees for additional hours beyond statutory entitlements. A new legal framework, introduced in 2022, stipulates that children aged under 3 and born after 1 September 2022 should have access to free childcare (Eurydice, 2025c; Araújo, 2024). At kindergarten age (3–6 years), the state funds 25 free hours of ECEC. A total of 0.4% of Portugal's GDP was allocated to ECEC provision in 2021 (European Commission, 2025, p. 45; Eurydice, 2025d). Portugal has additionally received support via the European Social Fund (European Commission, n.d.), although the amounts specifically supporting ECEC have not been disclosed.

Eligibility model and accessibility tools

Portugal places a strong emphasis on increasing universal access to ECEC, in order to reduce child poverty/social exclusion and address the country's declining birth rate (Women's Budget Group, 2023). It also has no childcare gap: ECEC provision is available from the end of paid parental leave (OECD, 2024). Despite progressive, inclusive policies, demand for services and a lack of financial support to realise these policies has given rise to significant challenges (Eurochild, 2024). For instance, the country's poorest families (particularly those based in urban areas) are disproportionately disadvantaged in their access to appropriate provision (Araújo, 2024).

Portugal's ECEC networks comprise: (1) public services; (2) private non-profit providers in partnership with the government (known as IPSSs or 'private social solidarity institutions'); and (3) private for-profit providers. The state provides funding to public and private services within the IPSS network, as well as providers that have an agreement with the government under the Crèche Feliz (Happy Nursery) programme. This programme supports the national initiative to expand free childcare for under-3s by implementing free provision among private providers (Eurydice, 2025a). The majority of childcare for under-3s is provided by the IPSS network (Eurydice, 2025c), whereas most kindergarten provision is public (Araújo, 2024).

On the demand side, Portugal has numerous initiatives to increase access to ECEC. The main initiatives have already been described above, namely the new legislative framework for free childcare for under-3s and the Crèche Feliz programme. For those paying pre-school fees, the state provides additional grants, such as the 'family support development contract' (Eurydice, 2025c), and financial assistance for children accessing private for-profit services (Women's Budget Group, 2023), both of which are means-tested on family income.

In terms of supply-side tools designed to support ECEC, Portugal has seen increasing professionalisation of the early childhood teacher (ECT) role (Araújo, 2024). Since 2007, ECTs have been required to have a bachelor's degree in basic education and a master's degree that includes a specialisation in pre-school education. Childminders, meanwhile, require an upper secondary-level qualification, as well as training units from the National Qualifications Catalogue that focus on child support. There are legal frameworks to support free CPD for all ECEC sectors. Most ECTs work full-time and there is little flexibility around prescribed contact hours, though there are some exceptions. For example, part-time employment can be arranged based on age, length of service and whether individuals have a child/grandchild aged under 12 or with a disability (Araújo, 2024).

Base salaries are set by a joint order from the Prime Minister and Minister of Finance and negotiated with union representatives (Eurydice, 2025b). The Ministry of Education pays a salary supplement to private workers to renumerate them at the same rate as those in the public sector (Schreyer et al., 2024). However, there have recently been strikes calling for fair wages and pension reforms for ECTs. In terms of private-sector funding, the European Investment Bank has provided €300 million for state-funded education, though it is unclear what proportion was allocated to ECEC (EIB, 2025).

Portugal's major policy shifts include the integration of ECEC (particularly for under-3s) into the country's educational system. As a result, the sector is now required to follow national pedagogical guidelines and is coordinated by the Ministry of Education and the Ministry of Labour, Solidarity and Social Security. Another notable policy shift already mentioned above is the legislation to continue expanding free access to childcare (Araújo, 2024). The aim is for Portugal to extend free childcare to all children born after 2021 by 2024 (affecting 100,000 children) and to create 15,000 new ECEC places by 2026 (Eurochild, 2024).

Summary table: Portugal's ECEC system

CATEGORY	PORTUGAL'S ECEC SYSTEM
Governance and funding model	**Centralised with input-based features.** The main funding mechanism is lump-sum funding from providers and income-based parental fees. **Provider coverage:** crèches (ages 0–2) are mainly provided by the non-profit, state-supported IPSS network, whereas kindergartens (ages 3–6 years old) are mainly publicly provided. **Role of private finance:** limited; however, there is some private support for expanding provision.
Supply-side tools	**Early childhood teacher (ECT) is a professionalised role** requiring a postgraduate-level qualification, differentiating the role from childminders and auxiliary workers. **CPD** is offered at all levels. **Most ECTs work full-time** and there are **limited exemptions.** There are some efforts to equalise pay, **but concerns remain around fair wages** in the sector.
Demand-side tools	The Crèche Feliz (Happy Nursery) programme has introduced progressive rollout of **free childcare** to under-3s. The state funds **25 free hours** for children aged 3–6. **Means-tested grants** exist for families that need to pay fees for additional hours or to for-profit providers.
Major policy shifts	Integration of ECEC into Portugal's education system, coordinated by ministries. Continued expansion of universal access as per the new legal frameworks and the Crèche Feliz programme. Increasing the number of ECEC places to expand access.

Eligibility model timeline

Age range	Explanation
0–2 years	**Since 2022, all children in this age group have been legally entitled to free crèche/nursery attendance,** regardless of provider type (public, private, non-profit). This universal free provision is relatively recent and applies to all children born on or after 1 September 2022. Pre-school childcare is non-compulsory.
3–5 years	**25 hours of free ECEC.** Children in this age group have a legal entitlement to kindergarten; however, attendance is non-compulsory. Additional hours are funded by parental fees, with means-tested grants in place.
6+ years	**Free compulsory education (primary school)**

Country profile 8: Slovenia

Overall ECEC structure

Legal governance of ECEC in Slovenia (covering children aged 1–6) is the responsibility of the Ministry of Education. A total of 5.7% of the country's GDP was spent on education in 2022, with 1.1% allocated to ECEC (Schreyer et al., 2024). Slovenia is a noteworthy example of universal childcare, with no childcare gap between the end of parental leave and the start of ECEC entitlement (Scottish Government, 2025).

Funding governance

ECEC funding is decentralised in Slovenia. It is made up of a combination of municipality budgets, parental fees and some national funding (Eurydice, 2024; Schreyer et al., 2024). Municipalities fund public providers, as well as private kindergartens 'with a concession'. These approved providers are considered part of the public kindergarten network. Private providers 'without a concession' may receive partial municipal funding but rely mainly on parental fees. Though pre-schools operate somewhat independently in terms of managing their own budgets and development planning, pre-school spending requires municipal approval, which is obtained via funding requests (Eurydice, 2024).

Eligibility model and accessibility tools

ECEC in Slovenia is universal, meaning that children from the age of 11 months have a legal entitlement to full ECEC provision, but attendance is not compulsory (Schreyer et al., 2024). The sector is divided into provision for ages 0–3 and 3–6 (prior to compulsory primary school attendance).

Supply-side tools used by the Slovenian government include national-level funding for teacher training as well as scholarships for pre-school teachers and research (Eurydice, 2024a). The state provides subsidies for tuition fees and co-funds professional development programmes (Eurydice, 2025). As an example, the project 'Digit-sustainable teacher' aims to train at least 20,000 professionals and managers in digital competences, competences for sustainable development and financial literacy. It is financed by the National Resilience and Recovery Plan (Jager, 2024).

Early childhood teacher (ECT) is a professionalised role that requires an undergraduate level of education (Schreyer et al., 2024). ECEC employers themselves finance CPD activities; however, there is some state co-funding for training opportunities (Jager, 2024). Despite some salary increases and improvements to promotional tracks, early childhood assistant teachers receive low salaries (only slightly above the Slovenian minimum wage). The Ministry of Education has published an open call for internships to encourage recruitment (Jager, 2024).

In terms of demand-side support, the state provides some national-level funding to supplement parental fees. This is means-tested, so that parents are required to pay between 0% and 77% of the full programme price depending on their financial situation (Eurydice, 2024). There are also some sibling exemptions: since 2021, parents have been exempt from paying for younger children if more than one child is enrolled in kindergarten (Eurydice, 2024). Despite these demand-side tools, Slovenian parental fees are amongst the highest in Europe (Schreyer et al., 2024).

Additionally, as part of the European Cohesion Policy 2021–27, EU funding was given to support children with special educational needs and disabilities (SEND), with a focus on improving resources and training; however, the specific allocation to ECEC is unclear (EASPD, 2024).

One major policy shift in Slovenia was the 2025 draft amendment to the Kindergarten Act, which was intended to improve conditions in pre-school education. Its objectives included compulsory inclusion of Roma children and restriction of public funding for private kindergartens, moving from a situation of automatic eligibility for funding to one where municipalities can formally agree which private providers should receive concessions (Eurydice, 2025).

Summary table: Slovenia’s ECEC system

CATEGORY	SLOVENIA’S ECEC SYSTEM
Governance and funding model	**Decentralised.** Municipally run and funded, supplemented by parental fees and some means-tested national-level support. **Provider coverage:** majority are public services, supported by private providers ‘with concessions’ integrated within the public network. There are some private for-profit providers. **Role of private finance:** only limited evidence available.
Supply-side tools	**Early childhood teacher (ECT) is a professionalised role** (undergraduate education required). National-level initiatives to support development, recruitment and training in public and private sectors. Concerns around low salaries for support staff.
Demand-side tools	**Means-tested national-level funding to supplement parental fees** (0–77% coverage). Sibling exemptions for families with multiple children.
Major policy shifts	Draft amendments to the **Kindergarten Act** seek to improve inclusion for Roma children and to restrict allocation of public funding to private providers ‘without concessions’.

Eligibility model timeline

Age range	Explanation
1–6 years	**Children in this age group have a legal entitlement to non-compulsory ECEC.** While there is a single ECEC system covering children from 11 months to ~6 years of age, provision is divided into ages 0–3 and 3–6. Means-tested fees capped from 0% and 77% of the costs, depending on family’s socioeconomic situation.
6+ years	**Free compulsory education (primary school)**

Country profile 9: Spain

Overall ECEC structure

Spain's ECEC system is undergoing a significant state-led transformation. The new system is characterised by a dual-cycle structure and highly decentralised governance model (Eurydice, 2025a). The system is divided into a first cycle for children aged 0–3 and a second, education-focused cycle for children aged 3–6. The landmark 2020 education law, LOMLOE (Organic Law Amending the Organic Law of Education), and its implementing regulation, Royal Decree 95/2022, have been pivotal in this reform. These legislative acts reaffirm the educational nature of the 0–6 stage and set out a more detailed structure, with organisational and minimum teaching standards for the second cycle (ages 3–6) which serve as orienting guidelines for the first cycle (ages 0–3) (Eurydice, 2025a; Heras-de-la-Calle & León, 2024).

Governance is decentralised, with Spain's 17 autonomous communities holding primary legislative and managerial responsibility (Eurydice, 2025d). While the central government sets the overarching legal framework, the autonomous communities are responsible for funding allocation, curriculum development (based on national minimum standards) and management of ECEC services. By its nature, this structure leads to significant regional variation in access, cost and policy implementation (European Commission, 2024; Eurydice, 2025d).

Funding governance

The funding model is predominantly public, and tax-based, drawing from central, regional and local government revenues. In 2022, public spending on education in Spain is provisionally estimated to have made up 4.4% of GDP, below the EU average for that year (4.7%) (Directorate-General for Education, Youth, Sport and Culture (European Commission), 2024). Spain's public expenditure on early childhood education (ISCED 0) was ~0.62% of GDP that same year (Eurostat, 2025).

A key feature of the Spanish funding model is that significant amounts of public funds are channelled to private providers through the *centros concertados* (publicly funded private schools) network and other subsidy schemes, which are a core component of the state-supported system (Eurydice, 2025b; 2025d). The post-2020 landscape has been shaped by a major injection of EU funds from the Recovery and Resilience Facility (RRF). The central government is using its allocation of ~€670 million from the RRF as a key supply-side tool to steer national policy, specifically to create more than 65,000 new, free public places for the 0–3 cycle by 2025, with a focus on serving children from vulnerable backgrounds (Council of Ministers, 2021).

Provider coverage is a mix of public schools, *concertados* and fully private centres. For the second cycle (3–6 years), provision is universal and free, resulting in an enrolment rate of 96.7% in 2022, one of the highest in Europe. In 2022–2023, the 0–3 years provider split was 53.1% public, 18.2% *concertados* and 8.7% private non-*concertados* (i.e. 46.9% private in total) (Ministerio de Educación, Formación Profesional y Deportes, 2024). Spain's formal childcare enrolment rate for this younger age group was 55.8% in 2023, substantially above the EU average of 37.5% (European Commission, 2024).

Eligibility model and accessibility tools

Demand-side tools are varied and largely managed at the regional level. Early childhood education for ages 0–3 is a voluntary stage funded through diverse regional policies rather than a national legal entitlement (Eurydice, 2025c). Approaches to providing free access vary significantly by region; for example, Galicia offers tuition-free enrolment at all participating centres regardless of ownership; Castilla y León provides free places across a network of public and authorised schools; and the Comunitat Valenciana subsidises attendance at private and municipal centres via its programme Bono Infantil (Xunta de Galicia, n.d.; 2025; Junta de Castilla y León, 2025; Generalitat Valenciana, 2025).

Even where tuition is free, families typically cover ancillary costs, as seen in Madrid's municipal network, where schooling is free but meals commonly cost

~€96 per month and extended hours are ~€10.83 per 30 minutes, with a separate regional voucher system available to support families using private centres (Ayuntamiento de Madrid, n.d.; Comunidad de Madrid, 2024; n.d.; Escuela Infantil Móstoles, n.d.). Vouchers are often complemented by tax deductions; for example, the region of La Rioja allows families to deduct 20% of ECEC expenses, up to a maximum of €600 per child annually (Tax Agency, 2024).

The role of private finance is primarily concentrated in service provision rather than large-scale equity investment. The private market has been described as highly atomised and fragmented, as it consists of many small, independent operators rather than being dominated by large corporate chains (Mangano, 2025). This structure, combined with strong government price controls (due to the expansion of free provision and fee caps) and the complex regulatory oversight of 17 different regional governments, makes the sector a less attractive market for the typical private equity consolidation strategy.

Quality assurance is pursued through regulation and curriculum mandates, rather than performance-based funding. The LOMLOE and Royal Decree 95/2022 have established a comprehensive, competency-based curriculum for both ECEC cycles, detailing specific learning areas and skills that all providers – public, *concertados* and private – are expected to foster (Eurydice, 2025c).

In Spain, the educational qualifications required for ECEC teachers depend on the age group of the children: (1) for children under 3 (first cycle of *educación infantil*), teachers must have either a vocational qualification (ISCED 5) as a *técnico superior de educación infantil* or a bachelor's degree (ISCED 6) in early childhood education (European Commission, 2025); (2) for children aged 3 and over (second cycle of *educación infantil*), teachers are required to hold a bachelor's degree (ISCED 6) in early childhood education (European Commission, 2025). In some autonomous communities, both types of professionals may work together in settings for younger children.

Summary table: Spain's ECEC system

CATEGORY	SPAIN'S ECEC SYSTEM
Governance and funding model	Highly decentralised, with 17 autonomous communities bearing primary responsibility for funding and management (Eurydice, 2025d). A predominantly tax-based model with a mix of public and publicly funded private (*concertados*) provision. The central government uses earmarked EU funds to steer national policy. **Role of private finance:** the private sector is a major service provider, but direct private equity investment is limited.
Supply-side tools	**Public funding for private providers:** significant public expenditure is directed to *centros concertados* to cover operational costs.
Demand-side tools	**Free provision:** the second cycle (3–6 years) is universally free. Free provision is being progressively extended to the first cycle (0–3 years), prioritising children from vulnerable backgrounds (Eurydice, 2025a; Council of Ministers, 2021). **Regional subsidies and tax deductions:** autonomous communities offer means-tested subsidies and tax deductions to reduce ECEC costs. For example, La Rioja offers a 20% tax deduction, capped at €600 per child (Tax Agency, 2024).
Major policy shifts	**Organic Law Amending the Organic Law of Education (LOMLOE) and Royal Decree 95/2022:** fundamental reforms reaffirming the educational character of the 0–3 cycle, promoting inclusion and defining the curriculum (Universidad de Almería, 2021; Eurydice, 2025c). **RRF investment:** ~€670 million from the EU's Recovery and Resilience Facility has been allocated to create 60,000+ new public places for the 0–3 cycle by 2025 (Council of Ministers, 2021).

Eligibility model timeline

Age range	Explanation
0–3 years	**No legal entitlement.** This is a voluntary stage funded through diverse regional policies. Subsidies and tax deductions are provided at regional level. The expansion of free places prioritises children at risk of poverty and social exclusion.
3–6 years	**Universal provision.** A guaranteed legal right to a free ECEC place, with 96%+ enrolment rate.
6+ years	**Free compulsory education (primary school)**

Country profile 10: Sweden

Overall ECEC structure

In Sweden, ECEC services for children aged 1–6 form part of the country's unified education system, overseen by the Ministry of Education and Research. ECEC is divided into pre-schools (*förskola*) for children aged 1–5 and a compulsory pre-primary transition class (*förskoleklass*) (Karlsson Lohmander, 2024) for children aged 6. Sweden spends 1.6% of its GDP on ECEC overall, more than many of its counterparts (US$18,010 per child compared to an average of US$14,436 in other OECD countries) (Garvis, 2018; Dutta, 2024).

Funding governance

ECEC is funded by a combination of municipal funding and state grants, supplemented by parental fees. Municipal funding derived from municipal taxes makes the largest contribution (EASNIE, 2023), while state grants comprise slightly over 20% of overall funding (Eurydice, 2025c). This demonstrates Sweden's highly decentralised system. Municipalities are responsible for allocating funding to providers, which then organise ECEC provision and manage their budgets independently (NLS, 2025).

Municipalities tend to follow an input-based approach, allocating funding across schools in their localities based on per capita financing and student need (NLS, 2025). Municipalities' spending varies across schools, sometimes depending on local political priorities (NLS, 2025).

A national equalisation system, following a 'socioeconomic compensation model', has been established to address the significant differences between municipalities with higher and lower tax capacities (NLS, 2025). Since parental fees are used to supplement childcare costs across the sector, a cap (*maxtaxa*) was also implemented based on sibling attendance and family income (Garvis, 2018). Providers are compensated from national funds for any loss of income arising from this cap (European Commission, 2020). On top of these provisions, families receive allowances for children through publicly funded social insurance (*socialförsäkringen*) (European Commission, 2024).

Eligibility model and accessibility tools

Children have a statutory entitlement to ECEC from the age of 1 if their parents/guardians work, study or have other caring responsibilities. There is also universal entitlement for children aged 3–6 covering 525 hours a year (approximately 15 hours a week) (Garvis, 2018). As mentioned, pre-school attendance (for ages 1–5) is non-compulsory. At the age of 6, children attend a compulsory pre-primary transition class to prepare them for school.

On the supply side, Sweden set aside SEK 673 million in 2023 for pre-school education initiatives, including training for special education teachers (Eurydice, 2025d). Due to a high degree of municipal-level organisation, pre-school teachers and childcare workers can have a variety of qualifications, and the workforce can include unqualified staff (Karlsson Lohmander, 2024).

The setting of teacher salaries is also decentralised and is decided between employers and teachers; the Sveriges kommuner och regioner (Swedish Association of Local Authorities and Regions, SKR) supports negotiations with central unions over salaries and working conditions (Eurydice, 2025e). Continuing professional development (CPD) for pre-school staff is funded by both municipalities and the state (Karlsson Lohmander, 2024).

Several demand-side tools have been implemented to support ECEC in Sweden. For example, a general state grant is given to 290 municipalities (Schreyer et al., 2024). Targeted grants are also supplied for specific needs, for instance to cover salary boosts for ‘first teachers’ or teachers with additional qualifications, to support children from lower socioeconomic backgrounds (NLS, 2025) or with special educational needs and disabilities (SEND) (EASNIE, 2023) and to improve group sizes and the quality of provision (Eurydice, 2025a). Municipalities also provide further subsidies for children with SEND (Dutta, 2024).

The ECEC landscape is mainly (70–80%) composed of municipal services (Karlsson Lohmander, 2024; Eurydice, 2025b). The remainder is private/independent providers (both for-profit and non-profit). There are also alternative models, such as parent cooperatives which run volunteer pre-schools and abide by national laws and guidelines (Karlsson Lohmander, 2024). There is limited publicly available evidence of any private funding in the ECEC sector.

As outlined above, major policy shifts have seen the allocation of SEK 2.8 billion from the state to improve quality in pre-school education, with SEK 800 million dedicated to reducing class sizes and the remainder to support retention, recruitment and training of staff (Eurydice, 2025a).

Summary table: Sweden's ECEC system

CATEGORY	SWEDEN'S ECEC SYSTEM
Governance and funding model	**Highly decentralised.** ECEC is mainly funded by municipal taxes, supplemented by block and targeted state grants and parental fees. **Provider coverage:** majority municipal providers, with some non-profit (largely municipally funded) and for-profit providers. **Limited evidence of private funding to support ECEC.**
Supply-side tools	Municipal and state funding to support **staff training,** but variation in qualifications for pre-school teachers and childcare workers. **Union support** for negotiating salaries and working conditions, since these are set by providers. Municipalities fund CPD for staff of municipal and independent providers.
Demand-side tools	National equalisation system addresses discrepancies in tax revenue across municipalities. Parental fees are means-tested with a maximum cap.
Major policy shifts	Funding dedicated to improving pre-school education, reducing class sizes and supporting staff training, retention and recruitment.

Eligibility model timeline

Age range	Explanation
1–5 years	**Children aged 3–6 have a legal entitlement to 15 free hours of non-compulsory ECEC (*förskola*).** Entitlement can extend to children from the age of 1 under certain circumstances (e.g. if parents have work, study and/or caring responsibilities).
6 years	**Children are required to attend a compulsory pre-primary transition class (*förskoleklass*) at this age.**
6+ years	**Free compulsory education (primary school)**

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Innocenti 2025 Global Rankings – Top 20

Overall rank	Country	Mental health	Physical health	Skills
1	Netherlands	1	4	11
2	Denmark	3	3	8
3	France	11	2	9
4	Portugal	2	10	22
5	Ireland	24	11	1
6	Switzerland	13	7	6
7	Spain	4	25	16
8	Croatia	9	31	3
9	Italy	8	16	23
10	Sweden	14	13	14
11	Hungary	6	30	13
12	Austria	16	20	7
13	Slovenia	28	18	2
14	Japan	32	1	12
15	Lithuania	20	17	17
16	Romania	5	32	26
17	Finland	21	23	18
18	Czechia	25	5	31
19	Canada	23	24	21
20	Slovakia	12	29	27

UNICEF (2021) – Indicators of national childcare policies

Rank	Country	Leave	Access	Quality	Affordability
1	Luxembourg	5	3	13	16
2	Iceland	19	5	1	15
3	Sweden	9	4	17	10
4	Norway	6	12	20	8
5	Germany	13	21	9	4
6	Portugal	12	15	10	12
7	Latvia	16	24	2	7
8	Denmark	27	2	5	17
9	Republic of Korea	4	10	26	14
10	Estonia	3	32	17	8
11	Finland	15	19	4	24
12	Lithuania	7	25	11	22
13	Austria	10	23	27	6
14	Malta	32	17	1	N/A
15	Italy	28	28	14	1
16	Greece	29	26	6	11
17	Slovenia	14	20	8	32
18	Belgium	26	8	21	23
19	France	22	7	24	25
20	Spain	25	11	23	19

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