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ECEC at a Crossroads? A **Comparative Analysis** of Early Childhood Education and Care in Five Countries

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Abstract

Early childhood education and care (ECEC) has moved up policy agendas across countries worldwide. In part, this reflects a growing body of evidence on the benefits of high quality ECEC services in the pursuit of a range of priority policy objectives - supporting children's development, contrasting socio-economic inequalities and promoting the reconciliation of care responsibilities with participation in paid work - with critical implications for the life chances and opportunities of individuals as well as for societies at large.

Despite the growing attention and agreement on the (potential) benefits of high quality ECEC, this policy field continues to be characterised by significant gaps in access to and quality of services, by policy fragmentation - across governance, financing and monitoring and evaluation - and by lively debate on what constitutes good quality ECEC.

Drawing on the experience of five European countries, England, France, Germany, Italy and Spain, this paper aims to contribute to the policy debate and learning on options for taking the ECEC agenda forward. With a focus on three key dimensions of ECEC – service access, quality, and cost, financing and affordability - the paper analyses the main trends and policy initiatives across the case study countries. It highlights the expansion over time of ECEC services, persistent, in some contexts increasing, inequalities in ECEC early years participation, and efforts to address access, quality and cost-related barriers.

The paper identifies ten common ECEC policy "dilemmas" or tensions that arise from a combination of ECEC institutional configurations and wider demographic and labour market shifts underway. It asks whether policy responses across the five-country experience reviewed display some degree of convergence or, conversely, differences, and finds similarities across some dimensions but also persistent fundamental differences across others, such as in the degree of continuity in ECEC services and in pedagogical approaches.

The analysis underscores how in the five countries studied, progress in terms of overall ECEC provision over the last two decades has been achieved by leaving some key challenges unresolved and possibly by exacerbating them. Two, in particular, stand out: socio-economic inequalities in access to ECEC services and service quality remain major challenges to the development of inclusive, sustainable and effective ECEC systems. If these two issues remain unaddressed, the ECEC reform agenda of the past two decades risks remaining incomplete and its transformative potential unfulfilled.

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1. Introduction

1.1 Background and motivation

Early childhood education and care (ECEC) has moved up policy agendas across countries worldwide (Devercelli and Beaton-Day, 2020; OECD, 2025; UNESCO, 2021). In part, this reflects a growing body of evidence on the benefits of quality ECEC services in the pursuit of a range of priority policy objectives. High quality ECEC can equalise opportunities for children, promoting human capital accumulation and the containment, or prevention, of social and economic inequalities over the life course (Heckman and Masterov, 2007; Melhuish et al., 2015; Schmutz, 2024). It can support work-life reconciliation and parents', especially mothers', participation in paid work (Carta and Rizzica, 2018; Scherer and Pavolini, 2023). These objectives have critical implications for the life chances and opportunities of individuals as well as for societies at large (EC Council Recommendation, 2019).

Growing acknowledgment of the value of ECEC is reflected in a flurry of policy documents and commitments in recent years, at national and international levels, outlining the conditions, regulations and targets for the establishment and expansion of quality ECEC services. It is also accompanied by increasing children's participation to ECEC services. Across EU countries, 95% of children between the age of 3 and the compulsory school starting age for primary education were in early childhood education in 2023 (EUROSTAT, 2025). Among younger children, below the age of 3 years, participation rates are considerably lower but have followed an upward trend: EU-27 countries recorded an average participation rate of 39% in 2024, compared with an average 25% rate in the mid-2000s, and against the EU Barcelona 2030 target of 45% (ibidem).

Yet ECEC also remains a policy area that continues to be characterised by significant gaps and inequities in service availability and quality, by policy fragmentation - across governance, financing and monitoring and evaluation - and by disagreement and debate on what constitutes good quality ECEC. Increases in average participation rates are marked by persistent significant socioeconomic inequalities, explored further in this paper. Moreover, improvements in enrolment in some countries are driven in part by demographic trends and declining child numbers, not just supply-side investments and expansion.

Drawing on the experience of five European countries, this paper aims to contribute to the policy debate and learning on options for taking the ECEC agenda forward. It identifies key ECEC policy access, quality and financing trends and issues, and examines the role of policy reform and of wider

social changes, notably demographic and labour-market shifts, in shaping such trends. Against this backdrop, it addresses the following questions:

- What are the ECEC policy dilemmas countries face in developing and expanding ECEC services? Have policy decisions and reform intentionally, or unintentionally, prioritised particular policy goals or (tried to) pursued them jointly? To what extent are different ECEC policy goals contemporarily reached or sacrificed in the pursuit of different objectives, specifically children's human capital accumulation, work and life reconciliation, and wider social inclusion?
- What are the policy implications and learning - in terms of policy options, design and implementation details – that emerge from the experience of the case study countries in addressing key issues across ECEC service use, quality, cost and financing?
- Do we observe policy convergence across countries in addressing common ECEC service challenges and opportunities?

In addressing these questions, the paper draws on five country studies completed as part of a Fondazione Agnelli project on "ECEC at a crossroads?" and published alongside it as working papers:

- *ECEC in England: Increasing affordability – but at what cost?*, by Kitty Stewart (Department of Social Policy and Centre for Analysis of Social Exclusion, London School of Economics and Political Science)
- *The French ECEC paradox: universal ambitions, unequal realities,* by Laudine Carbuccia and Lidia Panico (Centre for research on social inequalities, CRIS, Sciences Po/CNRS, and Laboratory for Interdisciplinary Evaluation of Public Policies LIEPP, Sciences Po, Paris)
- *ECEC in Germany: the well-designed expansion running out of steam?*, by Ludovica Gambaro (Independent Researcher)
- *ECEC in Italy: towards an integrated 0-6 years system?*, by Stefano Neri (Department of Social and Political Sciences, University of Milan) and Stefania Sabatinelli (Department of Architecture and Urban Studies, Polytechnic of Milan)
- *ECEC in Spain: so close to, so far away from, the Nordic model*, by David Palomera (Southern Denmark University) and Llorenç Soler-Buades (European University Institute)

This paper also draws on the wider literature on this topic and on original analysis of EU-SILC and EUROSTAT-Europop micro-data. Throughout, unless otherwise specified, the evidence and analysis presented for each country under review is drawn from the respective national paper listed above. We ask readers to revert to these individual papers for specific references and additional details. Where references are mentioned in the text, full details may be found in the bibliography.

The paper is organised as follows. The remainder of this section provides a brief overview of the wider demographic and labour market context within which ECEC policy takes shape and is debated. Section 2 provides a picture of the ECEC system in the five country case studies. Sections 3-5 synthesise and discuss key issues in ECEC access and use, quality, cost and financing. Section 6 discusses the ECEC policy dilemmas and options identified by this study. It concludes on whether we observe policy convergence and key issues going forward.

1.2 The socio-demographic and labour market context of ECEC systems

Developments in the wider context within which ECEC operates matter to the demand for services, and to the type of services required. By influencing the pressures and demands on social systems more broadly, they also condition the resources available to ECEC policy. At the same time, the availability and nature of ECEC services can influence such wider trends, as this study indicates. Two "macro" trends are of particular relevance to the ECEC sector: demographic and related migration trends, and labour market ones. They play a role in shaping the context in which policy decisions have been made and are expected to continue to do so going forward. Table 1.1 highlights three main sources of variation in demand for ECEC systems: declining fertility rates, increasing immigration rates and increasing female labour market participation.

Although these three trends have affected all five countries included in this study, their intensity varies across contexts. The total fertility rate has been well below 2 in all five countries and has continued to decline over the first two decades of the 21st century, with varying trends in the UK and Germany. The situation appears particularly critical in Italy and Spain.

Simultaneously, all countries have experienced an increase in employment rates among mothers with young children. This trend has followed different trajectories depending on mothers' education levels and number of children. Less-educated women and those with two or more children have lower average labour market participation rates compared with their higher-educated counterparts and women with only one child. At the same time, recent decades have seen a) convergence among mothers' labour market participation across countries based on the number of children they have, and b) growing divergence based on their education level. Labour market participation of low-educated mothers increased only in Germany and the UK, while their participation decreased in other countries. Notably, Italy experienced a reduction in labour market participation even among mothers with upper secondary education. Currently, participation rates of mothers with children are increasingly similar across countries, with Italy lagging behind.

Mothers' labour market participation is also influenced by access to part-time employment. Part-time work is particularly prevalent among households with at least two young children. The UK and, even

more so, Germany stand out for their high rates of mothers employed part-time compared to the other three countries.

Finally, the last two decades saw an increase in the diversity of populations in terms of migratory backgrounds. The share of young and adult women of working age with a migratory background grew in all five countries, regardless of how this background is measured (e.g., absence of national citizenship, foreign-born status, or descent from foreign-born parents). It was particularly marked in Germany, Spain, the UK. This increasing diversification of parental backgrounds may also imply an increasing diversity in norms and preferences regarding early care and education.

Table 1.1 The socio-demographic context: structure and changes in the first decades of the 21st century

	Year	France	Germany	UK**	Spain	Italy
Total fertility rate	*2000*	1.89	1.38	1.64	1.22	1.26
	2023	1.66	1.39	1.68	1.12	1.21
*Employment rate of mothers of young children – total**	*2006*	68.7 (61.8)	55.6 (49.6)	63.6 (57.9)	60.9 (51.5)	55.8 (49.2)
	2024	74.5 (74.4)	72.9 (71.2)	74.6 (69.9)	68.3 (62.2)	61.3 (54.0)
*Employment rate of mothers of young children – low educated**	*2006*	44.8 (35.6)	31.0 (26.6)	43.2 (41.9)	43.7 (37.0)	38.1 (30.4)
	2024	41.0 (30.8)	43.3 (41.5)	53.2 (42.9)	42.4 (44.3)	33.7 (28.5)
*Employment rate of mothers of young children – medium educated**	*2006*	68.6 (59.8)	58.4 (51.9)	62.8 (59.0)	63.1 (52.5)	62.5 (58.3)
	2024	73.9 (70.8)	77.1 (74.6)	71.8 (66.0)	69.8 (57.0)	55.1 (51.2)
*Employment rate of mothers of young children – high educated**	*2006*	82.0 (78.7)	72.4 (68.7)	84.0 (73.3)	77.0 (72.6)	73.8 (76.0)
	2024	82.0 (86.9)	78.7 (80.2)	83.0 (81.0)	82.6 (80.6)	82.7 (79.9)
*Mothers working part-time****	*2006*	26.8 (43.1)	55.2 (73.2)	54.8 (69.8)	27.5 (30.6)	35.6 (42.1)
	2024	28.6 (31.9)	58.0 (73.5)	42.1 (60.9)	22.6 (24.9)	31.2 (38.4)
Share of working women, aged 25-49 years, who are not citizen	*2000*	4.3	6.9	4.8	3.2	5.8
	2024	8.0	16.7	15.2	18.0	11.3
*First- or second-generation women in the labour market*****	*2024*	13.3 (29.5)	23.2 (38.4)	Not available	25.7 (28.1)	16.0 (18.1)

* Data refer to mothers with one child under 6 years of age; in parentheses, data refer to mothers with two children and at least one of them under 6 years of age.
** Data for the UK refer to 2019.
*** Percentage of women with a child under 6 years of age who are employed part-time.
**** Percentage of women aged 25–54 years who are foreign-born (first generation). Data in parentheses refer to women who are either first-generation or native-born with one or both parents born abroad (second generation).
Sources: Eurostat online database; indicators: demo_find; lfst_hheredch; lfst_hhptechi; lfsa_egan; lfsa_egaisedm

2. ECEC in the five case studies: an overview

Countries rely on a combination of policy tools to support parents and children in early childhood. These include parental leave and flexible working arrangements, tax and cash transfer policies (either directly or indirectly supporting them) and ECEC services. Across countries, and over time, policy experience varies with respect to scale and levels (also sometimes defined in terms of "generosity") and to the "mix" of policy measures used (the combination of measures and degree of reliance on alternative arrangements). Their adequacy and effectiveness are commonly discussed with respect to the overall level of "generosity" of the system as well as to the degree of continuity and coordination across different policies over the course of the childhood period.

In terms of overall national levels of public expenditure on family policies, the five countries included in the study exhibit relatively different levels of expenditure (Figure 2.1). In 2019, Germany was the top spender, with per capita spending of 98 thousand USD PPP per year, followed by France with 85 thousand USD. At a somewhat greater distance, England and Italy spent 66 thousand and 61 thousand USD respectively, while Spain spent 43 thousand USD. If we measure public expenditure in terms of share of GDP according to the latest data available (2021), France and Germany are the top spenders (3.4%), followed by England, Italy, and Spain (around 2.0%). In the first two decades of the 21st century, significant changes have occurred from a comparative perspective. Germany shifted from second place (in 2001, with expenditure levels like England and not too dissimilar from Italy) to first place.

Table 2.1 Public spending on family benefits on children aged 0-5 (per capita spending in USD PPP per year)

		France	Germany	United Kingdom	Spain	Italy
Total	*2001*	47,859	38,648	38,544	18,573	25,042
	2019	85,030	98,180	66,010	43,340	60,760
Cash and tax breaks	*2001*	17,668	22,556	17,908	6,356	6,976
	2019	29,180 (8,871)*	45,830 (14,593)*	28,610 (5,991)*	18,080 (12,134)*	27,940 (14,567)*
*Childcare***	*2001*	27,215	13,006	19,510	10,425	17,543
	2019	54,340	41,360	30,910	21,620	31,290
Other services in kind	*2001*	2,976	3,085	1,125	1,793	523
	2019	1,510	10,990	6,490	3,640	1,530
Public expenditure on families with children (% GDP)	*2001*	3.7	2.9	2.5	0.8	1.7
	2021	3.4	3.4	2.1	1.9	1.9

* Public expenditure on maternity, paternity and parental and home care leaves per live birth
** Including education expenditure when children go to primary school before 6 years of age
Source: OECD Family Database

France has one of the highest levels of family-related spending in the OECD, with significant subsidies toward services such as ECEC—constituting an important portion of total expenditure: 3.4% of GDP was allocated to policies including cash benefits, tax breaks, and childcare services, compared to EU and OECD averages of 2.6% and 2.3%, respectively. France, like Germany, provides both relatively generous cash and tax benefits alongside high spending on family services like childcare, creating a distinctive family policy environment. Over a third of this expenditure was directed toward cash transfers, while ECEC services accounted for about 1.4% of GDP (compared to 1% at the EU and OECD level).

The UK's and Italy's family policies feature moderate spending levels compared to France, Germany (higher spending) and Spain (comparatively lower). For these two countries, expenditure is relatively evenly balanced across leave, cash transfers, tax breaks, and ECEC services. However, in comparative terms, the UK's public expenditure on maternity, paternity, parental, and home care leave per live birth is the lowest among the five countries. Spain is the laggard when it comes to per-capita expenditure, whereas it is more in line with Italy and England when family policies are measured in terms of GDP share.

With regards to the specific focus of this study, ECEC services, institutional approaches and arrangements vary along several dimensions (Table 2.2). To start with, a key distinction lies in the child age at which ECEC services begin. While in Spain, official documents refer to ECEC from birth, in Germany, ECEC services are intended for children from the age of one year (following on from

well-paid parental leave of over 12 months). In Italy, France, and England, ECEC services are understood to target children from the age of 3, 4 and 9 months respectively (Table 2.2).

Table 2.2 ECEC systems in the five case studies: an institutional overview

	ECEC start age (policy design and regulation)	Integrated or separate early years – preschool?	Oversight and coordination responsibility at national level of early years: birth to preschool	Oversight and coordination responsibility at national level of early years: preschool	Service type	Private /public early years provision
England	9 months	Integrated	Department of Education		Centre-based and *childminder*	49% private (childminders excluded)
France	4 months	Separate	Ministry of Health and Solidarity	Ministry of Education	*Childminder*	55% private
Germany	1 year	Integrated	Ministry of Family* (*Länder* mostly responsible)		Centre-based and *childminder*	67% NGO no profit
Italy	3 months	Integrated on paper	Ministry of Education (and Regions)	Ministry of Education	Centre-based	51% private
Spain	From birth	Integrated on paper	Ministry of Education (and Autonomous Regions)	Ministry of Education	Centre-based	47% private

*Since May 2025, renamed the Ministry of Education, Family Affairs, Senior Citizens, Women and Youth.
Source: Fondazione Agnelli country studies (2026)

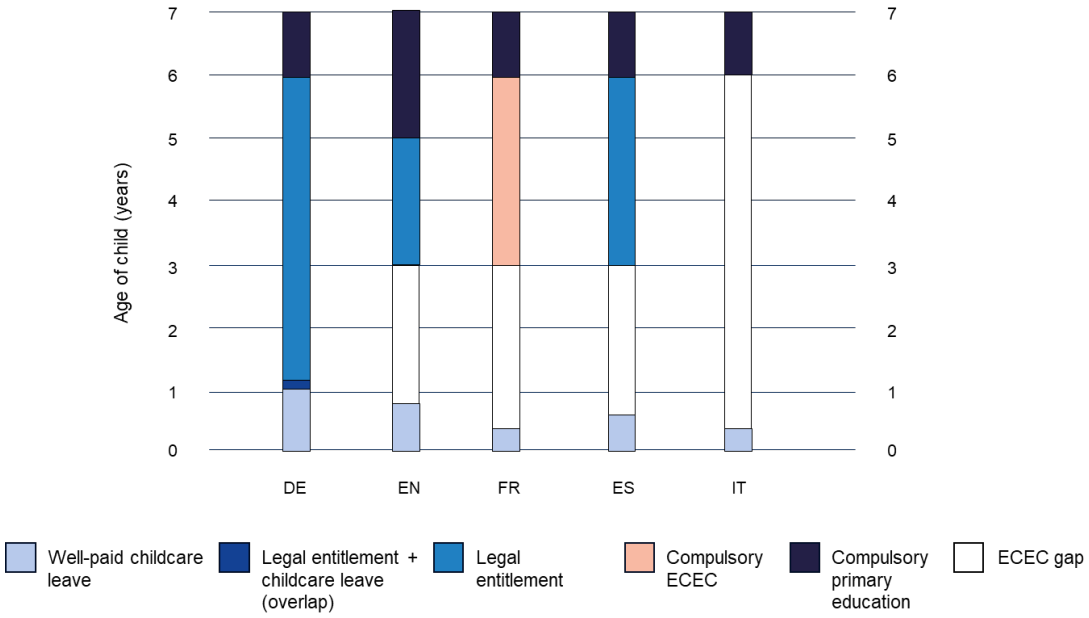
Another key distinction is whether ECEC services are envisaged and designed as a single integrated system for children across the 0-preschool years stage or as separate stages depending on the age of the child, one for younger children (commonly 0/2 years) and one for older, preschool, children (commonly 3-school starting age). Among the case studies, while there has been an important push in terms of legislation and policy initiatives for the integration of services across the preschool age group in Italy and Spain, France maintains a strictly separate system for younger and older children. Linked to this configuration, countries vary depending on whether ECEC is understood as an educational policy and, relatedly, the Ministry under whose remit it falls. In France, ECEC for 0-2 year-olds remains firmly grounded in social assistance principles and falls under the Ministry of Health, while preschool ECEC services are overseen by the Ministry of Education. In Italy, recent reforms have marked a shift, with the oversight of ECEC for 0-2 year-olds moving from the Ministry of Social Assistance or Labour and Social Policies to the Ministry of Education, whereas in Spain, although the 0-6 stage was already under the regulation of the Ministry of Education, the 0-2 stage has been increasingly integrated in the educational system. In England, ECEC (up until the age of 4

years) falls under the jurisdiction of the Department of Education, with the Department for Work and Pensions in charge of ECEC-related cash transfers to households. In Germany, at the national level, coordination and oversight of the integrated ECEC system is the responsibility of the Ministry of Family, which was merged, in May 2025, with the Ministry for Education and Research, and renamed Ministry of Education, Family Affairs, Senior Citizens, Women and Youth. An important share of oversight and coordination responsibilities fall on the *Länder*.

As stressed by the EU: “One way to ensure adequate provision of accessible and affordable high-quality ECEC is by establishing a legal entitlement to ECEC, by which public authorities guarantee a place for all children whose parents demand it, regardless of their employment, socio-economic or family status. In most Member States, such legal entitlement already exists but the starting age for the entitlement varies significantly. Ideally, there should not be a gap between the end of adequately paid or compensated maternity, paternity and parental leave and a legal entitlement to ECEC” (EC Recommendation, 2022/C 484/01).

The overall provision, and continuity in provision, of ECEC over the course of childhood is shaped by the length and the generosity of paid maternity and parental care leave, the presence of a legal entitlement or duty to ECEC, and at what age, and ECEC service availability in practice, by age of the child. Taking these factors into account, only seven countries in the EU (Denmark, Germany, Estonia, Slovenia, Finland, Norway and Sweden) have no temporal ECEC gap, ensuring a place in ECEC for each child around the end of their parents’ childcare leave (Eurydice, 2025). For our case study countries, Figure 2.1 highlights how the combination of well-paid childcare leave and an ECEC place guarantee translates into continuity in legal entitlements from birth, in the case of Germany, compared with countries in which such legal guarantees are weaker.

Figure 2.1 Gap between childcare leave and ECEC place guarantee, 2024/2025



Note: This figure refers to entitlements and guarantees for all children and does not capture entitlements for particular population groups or effective participation. For example, in England, children of working parents are entitled to 30 hours per week for 38 weeks from the age of 9 months. In Italy, *effective* preschool participation from age 3 stood at 95% in 2023. These do not reflect universal entitlements or guarantees and for this reason are not captured here. See details in the text below.
Source: Eurydice (2025) and Fondazione Agnelli country studies (2026)

Legal entitlements and policy design and delivery in practice determine the adequacy in terms of levels and degree of continuity of services across early childhood. Effective ECEC place availability and enrolment may reflect departures from legal entitlements in practice. This is the case, for instance, in Italy where ECEC enrolment rates for 3 to 5 year -olds effectively stood at 95% in 2023, even if preschool services and attendance are not guaranteed by law or mandatory (ISTAT, 2025). Given the close to universal coverage of ECEC services for children aged 3-5 years in all five systems, we focus on the earliest years in the discussion here.

Among the five case studies:

- Germany offers comparatively generous and continuous support to parents in the first years after the birth of their children. 'Well paid' leave (ensuring the equivalent of at least 65% of earnings) covers the entire first year of the child, while legal entitlement to ECEC access starts when children turn 1 year old. Not surprisingly, the ECEC coverage rate for children below 1 year is comparatively low, whereas it reaches 38% among 1- year -olds and 66% among two-year-olds.
- France and Spain provide medium level of continuity between leave and ECEC services. They offer 'well-paid' leave for around the first three months of the child's life and ensure an

entitlement (Spain) or the duty[1] (France) to enroll in ECEC services from the age of 3 years. Both these countries address childcare needs through the provision of services from the early age of the child: respectively 22% and 31% of children below 1 year of age are covered by ECEC services in Spain and France, 54% and 66% of 1- year -olds are covered and both countries achieve a higher coverage rate for 2-year-olds (73% and 74%).

- In England, 'well paid' leave is comparatively short, and depends on starting salaries, with 6 weeks (11.5% of a child's first 12 months) at 90% of weekly earnings, and the following 33 weeks at £187, or 90% of weekly earnings, potentially accounting for up to 75% (39) weeks of 'well paid' leave, depending on earnings. All 3 and 4-year-olds are entitled to 15 hours of government-funded childcare per week for 38 weeks per year, regardless of parents' income or employment status, with 2-year-olds from disadvantaged families also qualifying. Children of working parents are entitled to 30 hours per week for 38 weeks from the age of 9 months. Compulsory primary education begins at age 5.
- Compared with the other four countries, Italy provides a comparatively low level of continuity between leave and services entitlements. It offers 'well-paid' leave for around the first five months from childbirth and has no statutory right to ECEC of any kind. In this respect, it is among the few countries in the EU-27 (together with Ireland, and Malta) that has not formally established a legal entitlement or compulsory age to join ECEC (Eurydice, 2025). The coverage rate of 0-year-olds is low (10%) and increases among 1-year olds (40%) and 2-year-olds (52%).

[1] More precisely, French legislation prescribes that children from the age of 3 must be «educated», but this could also take place in the home. In practice, most households choose to send their children to preschool.

Table 2.3 Paid leave, ECEC entitlement and participation rates by child age

	Months covered in the first year of child's life through paid leave	Months covered in the first year of child's life through 'well-paid' leave*	Starting age for the legal right to an ECEC place (age)	ECEC participation rate < 1-year-olds	ECEC participation rate 1-year olds	ECEC participation rate 2-year-olds	ECEC participation rate 3–5-year-olds	*Overall model*
Germany	111.3%	111.3%	1 year-old (entitlement)	2	38	66	94	*High continuity*
France	80.6%	30.7%	3 years-old (mandatory)	31	66	74	97	*Medium continuity*
Spain	30.7%	30.7%	3 years-old (entitlement)	22	54	73	97	*Medium continuity*
England	74.9%	12.5%	- 3-4 year-olds 15 hrs/week (entitlement) - from 9 months all children of working parents 30 hrs/week (entitlement)**	n.a.	n.a.	55***	99***	*Medium-Low continuity*
Italy	91.6%	41.7%	No statutory right	10	40	52	95	*Low continuity*

* 'Well-paid' childcare leave is defined as a leave with earnings-related payment of at least 65% of earnings. It includes post-natal maternity, paternity and parental leaves (Eurydice, 2025).
** In England, all 3 and 4-year-olds are entitled to 15 hours of government-funded childcare per week for 38 weeks per year, regardless of parents' income or employment status, with 2-year-olds from disadvantaged families also qualifying. Children of working parents are entitled to 30 hours per week for 38 weeks from the age of 9 months.
*** UK figures from OECD (2025), England-level data not available.
Sources: Eurydice (2025); OECD (2025); Fondazione Agnelli analysis of EU-SILC 2023 data and country studies (2026)

3. ECEC service availability, access and use

At the EU level, the most recent targets require Member States to ensure an ECEC *participation rate* by 2030 of at least 45% for children below the age of 3 (measured using EU-SILC survey data, see more below) and of 96% for older children before entering primary education (EC Recommendation, 2022/C 484/01). The previous target for children below the age of 3 years, to be reached by 2010 (set by the European Council in Barcelona in 2002), required at least 33% of children under three years of age to participate in ECEC (for older children, 3 to mandatory school age, the target required a participation rate of at least 90%). While these targets have been reached as a European Union average, significant differences persist between and within Member States, in particular for children from lower income households and for those of youngest age. Among the country case studies, the 2010 target at the national level was met at different times – see Figure 3.1 below. Beyond national level participation rates, there has also been growing convergence on stressing the need to ensuring *equity in ECEC participation*. For example, the European Child Guarantee (Council

Recommendation of 14 June 2021) aims to “ensure that children at risk of poverty or social exclusion have free and effective access to key services, including ECEC, in all regions, including remote and rural areas”. Moreover, ensuring the *high quality* of ECEC services is increasingly recognised as another core policy priority, as discussed in the next section.

3.1 Participation in ECEC services

Table 3.1 ECEC participation by child age

	France	Germany	England	Spain	Italy
ECEC 0-2 participation	59% (2024, EU SILC)*	36% (2023, Child Care Study German Youth Institute)	47% of 1-2 year-olds (2019, Childcare and Early Years Survey of Parents)**	57% (2025, EU SILC)*	36% (2025, EU SILC)*
ECEC 0-2 participation - trends since the 2000s	Strong increase	Strong increase (since mid-2000s)	Strong increase	Strong increase	Moderate increase
Pre-admission to ECEC 3-5 for children below 3 years	11% of 2-year-olds	Not present	Not present	Present at the discretion of regional regulations	14% of 2-year-olds
*ECEC pre-primary (3-school start) participation rates**	95,5% (2024, EU SILC) Mandatory from 3 years of age Strong integration with primary school	91% (2023, Child Care Study German Youth Institute Not mandatory Widespread provision of free service Limited integration with primary school	95%*** (2024, DfE) Not mandatory Widespread provision of free service From age 4, close to universal attendance of reception classes in primary schools	97% (2025, EU SILC) Not mandatory Widespread provision of free service Integration with primary school	94% (2025, EU SILC) Not mandatory Widespread provision of free service Integration with primary school

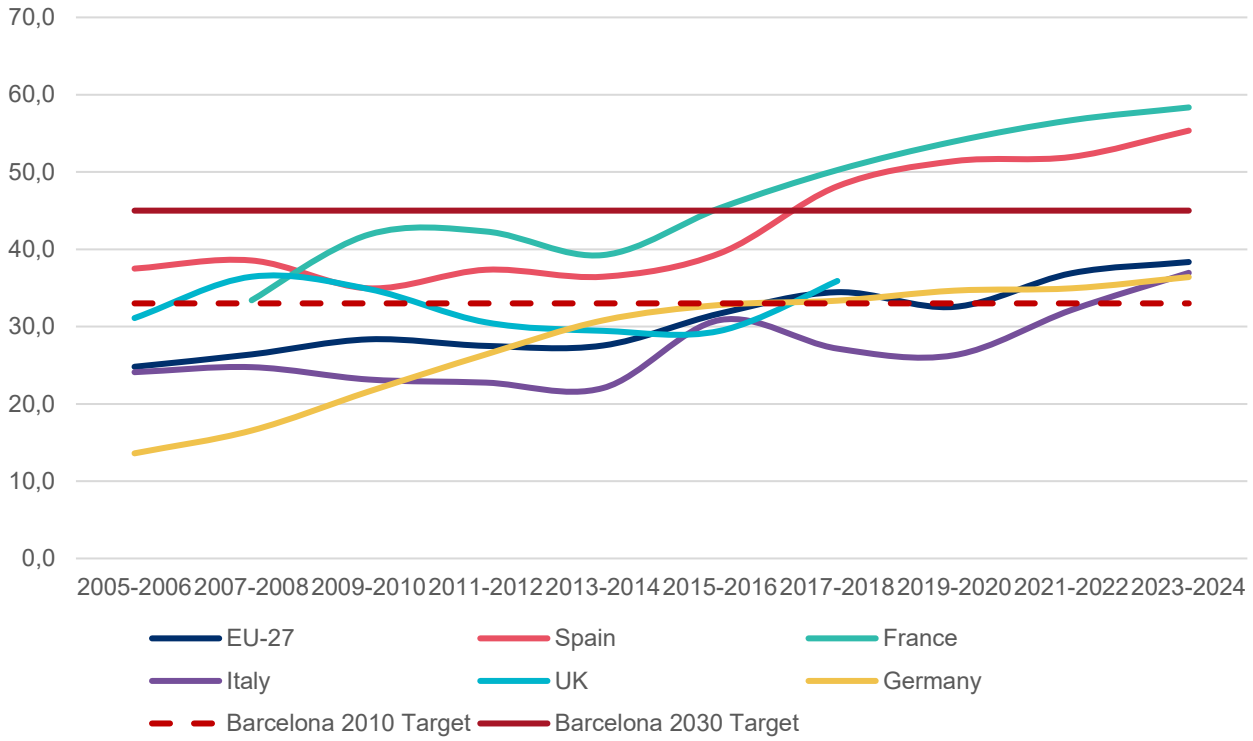
Source: Fondazione Agnelli based on EU SILC data and FA country studies (2026)
Note:
* EU SILC measures: “Percentage of children aged 0-2 in formal childcare or education” and “Percentage of children aged 3+ in formal childcare or education (pre-primary”
** Data refer only to 1-2 year-olds; source: Childcare and Early Years Survey of Parents in Farquharson and Olorenshaw (2022)
*** Data refer only to 3-4 year-olds.

Among the five countries considered, France has the highest ECEC participation rate for children below the age of 3, of around 60% (Table 3.1). It is followed by medium-high participation rates in Spain and then England. In Spain, 57% of children in this age group attend ECEC in 2025 according to EU SILC data. For England, the latest available international comparative data refers to 2019 and

shows a 47% participation rate among 1-2 year olds (as previously reported, data for children under 1 year of age are not available). Moreover, administrative records show that 75% of eligible two-year-olds take up their “two-year-old entitlement”: children in this age group have had the right to access a free part-time early education place since 2013, provided they meet certain eligibility criteria, including income-related ones. Children qualify if their families fall into roughly the bottom 40% of the income distribution. In Germany and Italy, ECEC participation over the last decade has been comparatively medium-low. For Germany, this figure reflects low-level participation of children below one year of age as a result of ECEC system design and provision, which includes an adequately paid parental leave for over the first 12 months of a child’s life. In Italy, according to EU SILC survey data, nationally, ECEC participation of children below 3 years of age first met the 2010 Barcelona target of 33% in 2021 and appears, over the last three years for which data are available, 2023-25, to have risen further, reaching the 35,5% mark in 2025.[2]

[2] Different ECEC data sources provide different measures of service availability, population coverage and effective use. In the case of Italy, there are two main sources of national ECEC data, both collected by Italy’s national statistical institute, ISTAT. EU SILC, an annual household sample survey on income and living conditions, collects information directly from households on children’s ECEC participation, providing estimates that are representative at the national level and comparable with those of other European countries. The definition of ECEC services adopted is broad and harmonised at the European level. In addition to enabling cross-country comparisons, these data permit analysis by household characteristics. ISTAT also surveys ECEC services directly, relying on a service census and on a census sub-sample, measuring the availability of ECEC places and population coverage in terms of service supply. This data source captures service characteristics in greater detail, enabling analysis by service type.

Figure 3.1 Percentage of children aged 0-2 years in formal childcare or education by country (2005-2024, two-year average)



Source: Fondazione Agnelli analysis of EU SILC and German Ministry of Family data

In terms of historic trends, ECEC participation rates of children under 3 years of age has increased in all five countries (Figure 3.1 using EU SILC data). In France, 30% of children under the age of 3 attended ECEC services at the start of the century and this share doubled over the course of two decades. Both Spain and Germany show a marked increase over time. In Spain, enrolment of 0-2 year-olds rose from around 11% in 2000 to around 55% in 2024. In Germany, participation rates began to rise slightly later, as an outcome of the mid-2000 childcare reform, and doubled over the following two decades. In Italy, the expansion of ECEC participation has been slower than in the other countries: it was around 25% in the mid-2000s. Moreover, such increase is to be at least partly attributed to the marked decline in number of births rather than to an increase in ECEC service provision (-40,000 children aged 0-2 per year on average compared to the 2010s). At the same time, Italy has a specificity in comparative perspective. Together with France and some regions in Spain (the decision lies at the regional government level), it is among the few countries where children aged 2 years can enroll in kindergarten instead of day-care centres. This is the case for 14% of two-year olds in Italy and 11% of two-year olds in France. However, this opportunity is unevenly distributed across municipalities and regions both in France and Italy. In the former country, it is linked to availability of slots once all children age 3+ years are registered: it is almost null in urban

areas. In the latter, it is concentrated in the Southern regions, where there is a lack of services for children aged 0-2 years.

When it comes to kindergarten and children aged 3-5 years, all five countries achieve close to universal coverage and national participation rates are above 90%. France achieved near-universal enrolment of children three-to-six years several decades ago through preschool, which is free, universal, and mandatory from the age of three. The *Ecole maternelle* is strongly integrated within the French education system and maintained separate from the childcare set up. Spain's legislation designates since 2002 the 3–5-year stage as a universally guaranteed and free service, although not mandatory. The 3–5 stage became practically universal by the beginning of the century. In Italy, ECEC 3-5 is not mandatory, however most children in this age attend. Attendance of state preschools is free of charge, apart from meal, transport and extra-hour services, while 'equalised' preschools can charge a subscription fee and, if private, also attendance fees. In Germany, ECEC is provided through a universal and strongly subsidised system, which recognises the right to ECEC, but does not make it mandatory. England differs from all other case studies. All children are entitled to a free part-time place in ECEC after they turn three, equivalent to 15 hours/week, 38 weeks/year. Then, from the September after they turn four, nearly all children attend "reception classes" in primary schools for a full school day (generally 9am - 3.30pm). Nine in ten three-year-olds enroll, while the share of four-year-olds is between 95-98%.

3.2 Gaps and barriers to ECEC access

The literature on ECEC, especially on daycare centres for children below the age of 3, relies on the concept of the "Matthew Effect" to describe structural gaps and disparities in the access to formal childcare provision which penalise disadvantaged households compared with wealthy ones (Pavolini and Van Lancker, 2018). The country studies find ECEC participation gaps across three interrelated dimensions: geography or location, household socio-economic status, and ethnicity (Table 3.3).

All five countries display geographical disparities in ECEC participation that are, however, only partially similar. In France, England, and Italy, smaller cities, rural areas, and less economically wealthy ones achieve lower coverage and participation rates than larger urban areas and wealthier areas. In the case of Italy, this divide mainly runs along the Northern-Southern Italy line. In the case of France, a further disparity arises from the different territorial distribution of type of provider: daycare centres are predominantly concentrated in regions with large urban agglomerations, while childminders are more prevalent in rural regions.

In Germany and Spain, territorial differences in ECEC participation decreased over the last two decades alongside the expansion of public ECEC provision. Furthermore, in the case of Germany,

it is the less economically well-off area (Eastern Germany) that has a higher ECEC provision than the better-off one (Western Germany). This is linked to the history and tradition, in Eastern Germany, of investing in ECEC, even prior to Germany's reunification in the 1990s.

Variations in ECEC participation by household socio-economic status are significant in all five countries and over time. Box 1 below reports trends in early years ECEC enrolment (below age of 3) between 2005-2024 using EU-SILC data for the four case study countries for which data are available. It highlights persistent differences in ECEC enrolment by household income group as overall ECEC service provision expands, with children from the poorest income group recording lowest ECEC participation rates persistently over time. Notably, in France, Italy and the UK, children in the most disadvantaged group continue to display participation rates below the 33% 2010 Barcelona target even in the most recent year for which data are available; in the case of France and Italy, 2024 (see Box 1).

France stands out in comparative perspective by having both a comparatively high early years participation rate *and* a particularly large access gap by socioeconomic status. In England, the two-year-old entitlement to ECEC for children in households belonging to the bottom 40% of the income distribution, assessed through receipt of means-tested benefits, helped to counter 'Matthew Effects': there has been a steady increase in the share of eligible children taking up their place, reaching 75% in 2024 from 58% in 2011. However, the longer hours available to children of working parents (30 hours rather than 15 per week, and from the earlier age of 9 months) builds in an inequality in terms of number or hours and duration of the service.

The working status of parents matters in the other case study countries too, with the emphasis on favouring access among children with working parents compounding these trends. In Italy, for example, parents' working conditions play a major role in access to early years services: enrolment is 14.2% among children with only one working parent, while it reaches 38.6% in those with both working parents. Parental education, closely associated with household socioeconomic status, plays an important role. In Germany, among 1-year olds who did not have a parent with a higher education degree, 28 percent attended an ECEC centre, compared to 43 percent of their peers with a parent holding a degree. This difference of 15 percentage points increases further among 2-year-olds, with enrolment rates of 51 percent and 73 percent respectively. In all five countries, there are strong disparities that penalise migrant households with ECEC attendance also stratified by immigrant background.

Table 3.3 Disparities in access to 0-2 ECEC services in the five countries

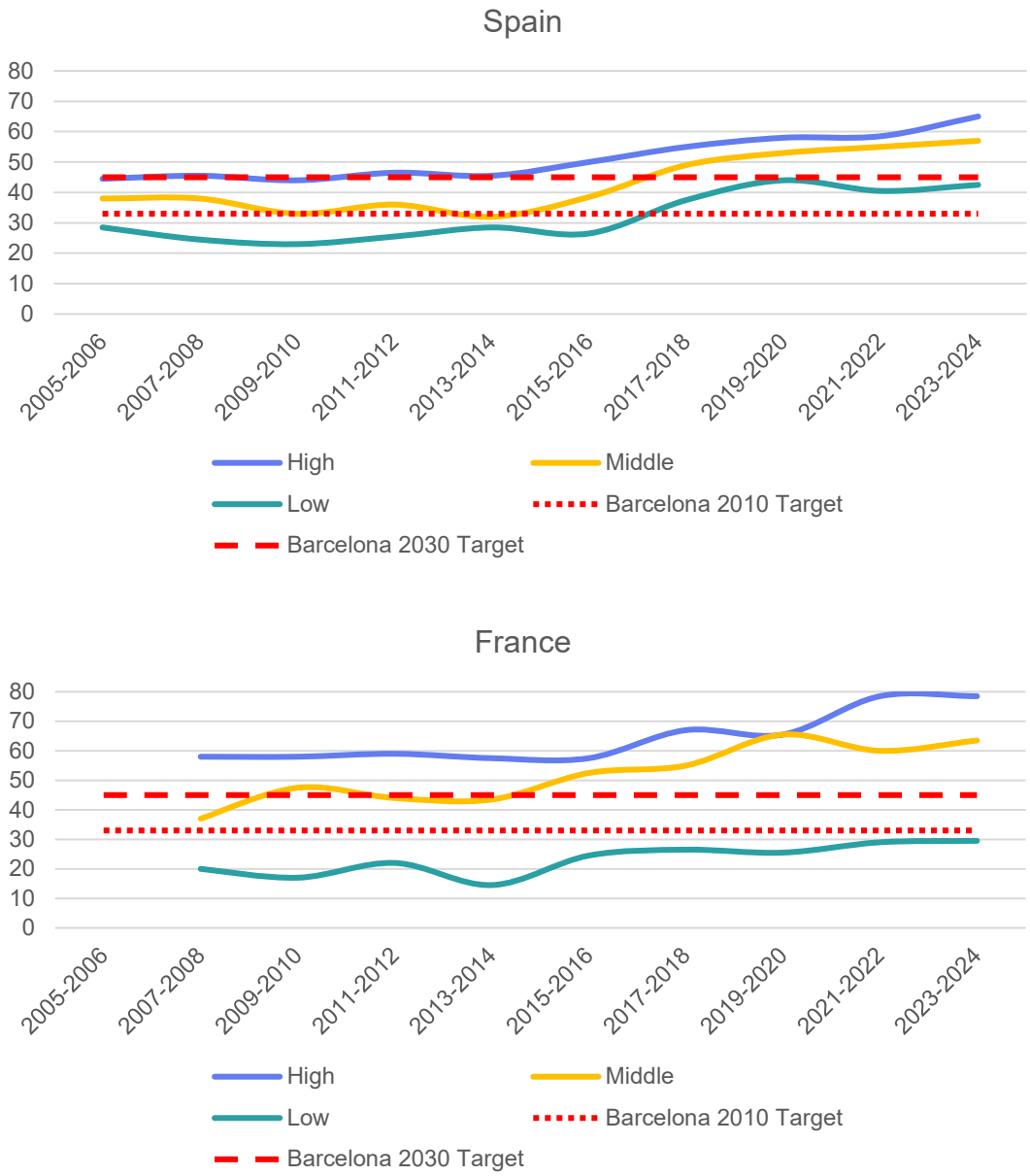
Dimension	France	Germany	England	Spain	Italy
Geography	Strong: urban-rural; wealthy-less wealthy; large cities-other cities	Strong: East-West, but decreasing	Strong: urban-rural; wealthy-less wealthy; large cities-other cities	Strong: urban-rural; wealthy-less wealth; large cities-other cities, but decreasing	Strong: urban-rural; North-South; large cities-other cities
Household socio-economic status	Strong	Strong	Limited but increasing (working vs not working mothers)	Strong	Strong
Ethnicity	Strong				
Determinants of access and use of ECEC: the supply side	Availability Admission criteria (preference for dual-earner couples) Information access and complexity	Information access and complexity	Admission criteria (increasing preference for working lone parents and dual-earner couples) Affordability Information access and complexity	Admission criteria (preference for dual-earner couples) Information access and complexity	Availability Admission criteria (preference for dual-earner couples) Information access and complexity

Source: Fondazione Agnelli country studies (2026)

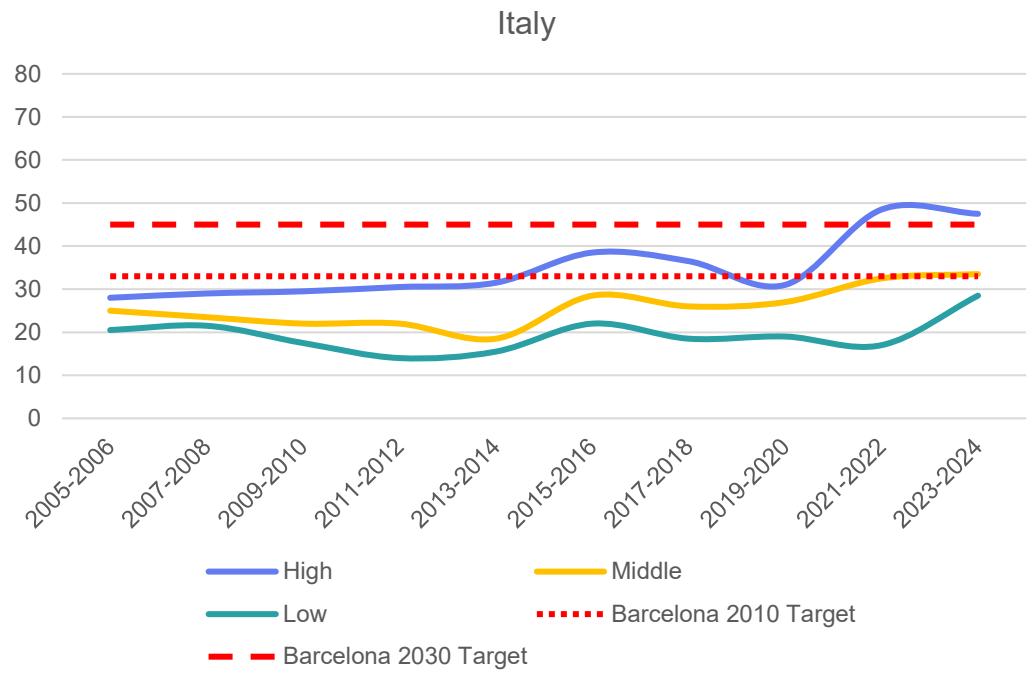
Box 1: ECEC participation 0-2 years and household socioeconomic background

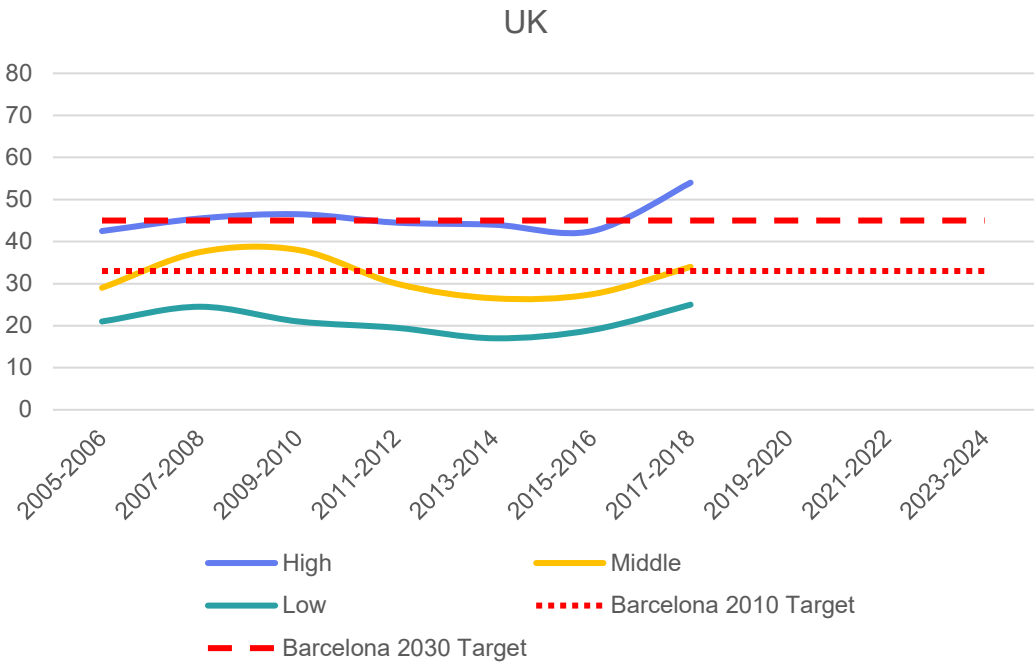
For the four countries in the sample for which we have comparable EU SILC data over time, we plot the ECEC enrolment rate for children aged 0-2 years by household income tertile. The analysis indicates a marked gap in enrolment across income groups over time in all four countries. In France, where the increase in early years ECEC has been highest over this period, expansion was accompanied by widening inequality in participation by children's economic background. In both France and Italy, in 2023-24, children from the poorest households, those set to benefit most from access to ECEC, have the lowest participation rates, still below the 33% 2010 EU target. In contrast, participation rates of children from households in the wealthiest income group in these countries is above the 45% EU 2030 target.

Figure 1: Percentage of children aged 0-2 in formal childcare or education by country and income tertile (2005-2024)



Source: Calculations by Fondazione Agnelli based on Eurostat EU-SILC microdata (2004-2024; two-year averages).
Note: Income tertiles are calculated based on the distribution of equivalised disposable income at the household level among families with children aged 12 or lower per country





Source: Calculations by Fondazione Agnelli based on Eurostat EU-SILC microdata (2004-2024; two-year averages).
Note: Income tertiles are calculated based on the distribution of equivalised disposable income at the household level among families with children aged 12 or lower per country

Both ECEC supply and demand side factors contribute to these gaps and inequalities in access to early years services. The two are partly linked, with social norms and household preferences at least partly conditioned by ECEC availability, its (perceived) quality and parents' trust in providers (e.g. Zoch and Schober, 2018).

On the demand side, prevailing social norms regarding motherhood and the gendered division of care work vary across countries and, within these, by population groups. Table 3.4 reports the share of individuals who agree with the sentence: "*Pre-school child suffers when the mother works*" according to the World Value Survey for the five case study countries. Among these, Italy stands out with more than half of Italy's population sharing traditional norms of motherhood (53%), compared to other countries, for instance England (20%). In all five countries, responses differ depending on individual and household characteristics. Education level, citizenship status and employment status all correlate with the likelihood of supporting traditional norms of motherhood. Lower levels of education, citizenship other than the country of residence and homemakers have a higher likelihood than highly educated individuals, those with the country of residence's citizenship and that are employed, to agree with traditional norms of motherhood. Only the area of residence does not appear to make a difference, aside from in the case of Spain.

Table 3.4 Share of individuals in each country that agrees with traditional norms of motherhood (percentage by country and individual's characteristics) (years 2017-2022)

	France	Germany	Italy	Spain	England
Total	30.7	31.3	52.7	25.4	20.3
Education level					
Low	44.2	44.1	63.4	33.9	30.6
Medium	29.5	31.7	44.1	19.7	17.8
High	11.7	23.1	29.8	14.2	17.7
Country citizenship					
Yes	29.6	30.1	52.5	24.6	19.7
No	45.1	43.4	77.6	40.0	28.0
Employment status					
Employed	22.2	23.5	43.0	26.0	19.1
Homemaker	48.2	43.0	70.1	36.6	21.2
Area of residence					
Urban	31.2	30.8	52.4	25.0	20.3
Rural	29.4	34.4	53.4	37.4	20.1

Source: own elaborations on World Value Survey database

With regards to ECEC policy design and implementation features (supply side) that affect differences and inequalities in ECEC access, the country papers highlight four main factors:

- *ECEC admission criteria that prioritise working parents*: in contexts in which demand for services outstrips supply and priority is given to children of dual-earner couples and working lone parents, this tends to disproportionately exclude low-income families. Aside from

Germany, where there is a universal right to an ECEC place, in the other four countries, the main criterion for admission used in the event of place scarcity is work-care reconciliation and priority of access is awarded to children with parents in employment. This practice tends to disadvantage low-income families, who are more likely to experience precarious employment. Parental employment status, especially stable permanent employment, is not evenly distributed across social groups and geographical areas and, when it plays a crucial role in determining access to childcare services, partially explains the differences in access by socioeconomic background.

- *Information asymmetries and administrative complexity of application processes*: access barriers arising from the difficulties in navigating complex systems to gather information on ECEC appear especially significant for less well-off groups, particularly those with a migratory background who may additionally face language barriers. The growing trend toward the digitalisation of the ECEC application process appears to be creating new barriers, especially for families from disadvantaged backgrounds without regular access to computers or the internet and that lack the digital literacy needed to navigate online application systems. Differences in awareness of service availability and support entitlements also help explain access inequalities.
- *ECEC service cost and affordability*: by design, early years ECEC enrolment and participation costs fall entirely or partially on households and can be expensive (i.e. as a share of household disposable income), in contrast with other school segments that are commonly free of charge and achieve (near-) universal take up or participation (Stewart et al., 2015; on this issue see Section 5). Even when fee waivers, free school hours or income support measures are in place to help families meet these costs, and in some contexts cover them fully, fees attached to services can act as a deterrent to enrollment, especially among families from disadvantaged backgrounds. In England, in 2023, 25% of surveyed parents declared it was “difficult or very difficult” to meet childcare costs. In Spain, according to a 2024 survey, around 40% of lower-income households referred to affordability as the main reason for non-use of ECEC services.
- *ECEC service quality*: parents’ perceptions of the adequacy of the care and education provided by ECEC services and their trust in providers appear central to participation. In this vein, EC Recommendation 2022 states: “Quality of ECEC provision is also an important factor in establishing trust between parents and the institutions providing education and care, and therefore an important factor in facilitating increased participation in ECEC” (EC Recommendation, 2022). Differences in service quality and/or of parents’ perceptions of ECEC quality by socioeconomic group may condition participation rates across groups.

3.3 Policies to expand ECEC provision, participation and tackle gaps

Efforts to expand ECEC provision, address participation barriers and reduce access gaps require taking both supply- and demand-side issues into account. Initiatives taken by the five countries under review address ECEC access, quality and affordability issues including: adjusting entitlements, eligibility requirements and processes; adjusting service times and flexibility; expanding provision in underserviced areas or territories; targeted financial support to vulnerable groups. Service quality-related efforts are discussed in section 4.

ECEC service entitlements, eligibility requirements and processes

A key adjustment in support of ECEC expansion entails introducing a legal right to and universalising service provision. Germany is the main innovator among the five countries in this respect, having introduced a legal right to ECEC from age 1.

As seen above, ECEC access criteria that prioritise certain groups, such as households with employed parents, can be exclusionary and reinforce inequalities in contexts of supply shortage. Initiatives have sought to increase transparency in how childcare slots are allocated, e.g. in France, and / or to include household socioeconomic conditions as criteria of access or even priority. In Spain, several regions have started adopting as priority criteria for ECEC access household indicators such as low income, single parenthood, disability, and gender-based violence. In Madrid, Galicia, the Basque Country, and Navarre, families with the lowest per capita incomes receive the highest scores in case of waiting lists for ECEC.

ECEC service flexibility to better-reflect household needs

Part-time ECEC services with limited flexibility in terms of service duration and times can limit participation of children with parents in precarious employment or looking for work. In France, the AVIP daycare (*Crèches AVIP*) programme aims to support job-seeking parents by offering dedicated childcare slots. The AVIP daycare centers (*Crèches AVIP*) initiative, launched in 2016, reserves daycare places for children of parents actively seeking employment. In its initial form, these daycare centers collaborate with social and employment agencies, such as the employment agency (*Pôle emploi*), to provide tailored support to these families, helping parents balance job-seeking activities with childcare needs.[3]

[3] By 2021, 262 crèches had been labeled as AVIP across 33 departments. However, evaluations of the program have revealed significant heterogeneity in its implementation across regions. In many cases, AVIP daycare centers have primarily formalised existing practices of supporting a certain number of low-income families rather than creating new dynamics of social inclusion. Additionally, many of the places in AVIP daycare centers are reserved for full-time care, which does not align with the more flexible needs of many job-seeking parents, limiting the programme's effectiveness.

Area- or geographically-targeted ECEC provision expansion initiatives

Initiatives to address ECEC supply shortages in underserved areas have been adopted in France, Spain, and Italy. In France, the "*Bonus Territoires*" was designed to incentivise the establishment of new daycare slots in disadvantaged urban areas, known as "*quartiers prioritaires de la politique de la ville*" (QPV). This bonus provides an additional €1,000 for each new childcare place created in these priority areas, with the aim of reducing the financial strain on poorer municipalities. The government allocated €565 million to this initiative between 2019 and 2022. However, progress has been slower than anticipated. By 2019, only 270 new daycare places had been created in QPV areas, far less than the intended targets.

Both Spain and Italy are pursuing the expansion of ECEC places in underserved areas through their National Recovery and Resilience Plans (NRRP). ECEC expansion became a flagship of Italy's NRRP. Initially, €4.6 billion were allocated to create 264,480 new places in daycares and preschools. Following the Plan's revision and EU Council approval, at the end of 2023, resources decreased to €3.24 billion, with the objective of creating 150,480 new places (UPB, 2025). Following a first open call, that received a limited number of applications, municipalities were ranked according to their need (in terms of resident population aged 0-2 and ECEC coverage), and resources targeted, in the first instance, towards areas with lower coverage. Spain has allocated €670 million of its NRRP to developing 65,382 new 0–2 stage ECEC places, prioritising access in areas with higher poverty or social exclusion risks, as well as in rural areas. In this case too, the allocation of resources was determined by social need. As is the case in Italy, Spain has encountered NRRP project implementation delays and execution challenges.

Financial support to expand the participation of disadvantaged groups

France introduced the "*Bonus Mixité Sociale*" as part of its 2018 anti-poverty strategy to promote social diversity in daycare centers, with the goal of ensuring that at least 10% of children in these facilities come from low-income families. Initially, €75 million was allocated for 2019, aiming to cover 90,000 daycare slots. The bonus offers financial support to daycare centers that serve a higher proportion of low-income families, providing up to €2,100 per slot where the average parental contribution is less than €0.75 per hour. By the end of 2019, the measure had achieved 91% of its target of 82,000 slots.[4]

[4] However, concerns have been raised regarding its implementation, and there is limited data to fully assess its impact. One key issue is that the bonus is not specifically tied to new places for children from low-income families but applies to all slots in a centre where families pay modest fees, including existing slots. This raises questions about whether the bonus is genuinely fostering social diversity or simply providing additional funds to centers that already cater to a high proportion of low-income families.

England has expanded government-funded hours, maintaining, however, a priority on working families. The Conservative government's 2023 announcement of a substantial extension of the 30 funded hours policy aimed for all children from the age of 9 months to access 30 hours/week of free childcare if their parents were in work. From April 2024, the policy covered 15 hours for two-year-olds, and from September 2024, 15 hours for children from 9 months upwards. This should improve affordability but may also further entrench inequalities. Empirical analyses show that less than 20% of those in the bottom third of the income distribution qualify, including just 2% in the bottom decile, compared to nearly 80% of families in the ninth richest income decile. Low-income working families in receipt of means-tested benefits can have up to 85% of childcare costs reimbursed, but the need to pay the cost upfront can be a barrier for those looking for work. From 2026, the government plans to make it easier to apply for support to cover upfront childcare costs. However, the subsidy remains conditional on work status, meaning children may lose their place if a parent loses their job.

In Italy, the '*Bonus Asilo Nido*' (Day-Care Centre Bonus) is a means-tested income support measure designed as a reimbursement of ECEC fees (see section 5 for additional detail). By design, as families need to anticipate the expenditure, the Bonus may not address the affordability barrier faced by households with the lowest incomes. Finally, some regions in both Germany and Spain have implemented ECEC fee reductions, or elimination, to improve affordability and participation (see section 5 on the topic).

4. The quality of ECEC services

4.1 ECEC quality: what do we mean and why does it matter?

Persistent gaps in early years ECEC coverage have meant attention has focused, in the first instance, on expanding coverage especially among young children. At the same time, there has been increasing recognition of the critical role of the *quality* of services, driven, in part, by a growing body of evidence on the role it plays in shaping children's outcomes.[5] Low service quality can limit ECEC effectiveness in terms of supporting child development and even lead to negative effects for children, as documented by the evaluations of specific country reforms. A case in point is Quebec's 1997 reform, which introduced universal low-cost childcare for children aged 0-4, in a province-wide rollout over a very brief time span, with the primary objective of promoting mothers' labour market participation (Cascio, 2015). Rigorous evaluations of the reform highlight negative effects on children

[5] At the EU level, the 2014 *Key principles of a Quality Framework*, the first statement from European experts from 25 countries on quality in ECEC, outlines 5 dimensions of quality: access; staff; curriculum; monitoring and evaluation; and governance and funding. Following on, the 2019 *EC Recommendation on High-Quality ECEC* "seeks to establish a shared understanding of what quality means in the early childhood education and care system. It sets out possible actions for governments to consider, according to their specific circumstances."

in the immediate and long-run and point to the low quality of services as the driving factor (e.g. Baker et al., 2019). The priority of supporting mothers' labour market participation and of expanding services over a brief time span (objectives both achieved), sacrificing the quality of services, are considered key factors in these results.

ECEC quality can take different forms, including structural and procedural dimensions of quality. The case study countries illustrate the range of quality dimensions and indicators and varying priorities on quality across countries. While traditionally emphasis was placed on structural dimensions of quality (such as the educator:children ratio and educator qualifications), in part as these are more readily observable and measurable, recent research and practice underscore the critical role played by procedural (or process-related) dimensions in ECEC. The latter may be less tangible and complex to measure but appear essential to securing children's outcomes. Several recent studies underscore the role of process measures, such as the interaction between children and educators, both as direct determinants of children's outcomes and as mediating factors of the impact of structural dimensions (von Suchodoletz et al., 2023). For some structural factors in particular, it is increasingly evident that, if they are to make a difference to children, they need to be accompanied by appropriate process quality arrangements (Blanden et al., 2022).

Variations in notions of ECEC service quality reflect differences in the weight awarded to ECEC priority objectives and guiding principles. Among the case study countries, for example, in Germany, the understanding that learning, care and upbringing are inseparable activities is central to ECEC services. Here, the prevailing ECEC quality orientation is based on holistic approaches, which emphasise interactional and situational aspects of the work with children, rather than the "pre-primary" approach adopted in other countries. While the theme of school-readiness has gained visibility since the late 1990s, it mostly remains interpreted in its broadest sense, so that the physical, social, emotional and cognitive competences are all considered fundamental not only in preparation to school entry but for children's development. Historically, the notion of quality based on children's screening and assessment, common in English-speaking countries, has been absent. However, current policy debates have awarded increasing weight to such practices, signalled for example by the recent inclusion of education within the remit of the Family Ministry and by the proposal to assess all children's German language proficiency at the age of 4.

4.2 Regulation and governance

All five countries have central level national regulation in the form of guidelines, frameworks and laws outlining quality dimensions and standards. Experience varies depending on which quality dimensions are regulated and by which level of government. Moreover, the ECEC stage matters. Quality of the 3-6 years or preschool stage is the subject of national regulation in most case study

countries. In Italy and Spain, where the regulation of quality for the 0-2 years segment is primarily delegated to sub-national authorities, there have been important initiatives to promote ECEC quality and coordination across ECEC segments in recent years, though on several quality dimensions, as will be made clearer below, regulation responsibilities lie with the respective local authorities, leading still, in most of these countries to significant variation across both structural and process quality dimensions, particularly in the ECEC below 3 segment.

In France and England, structural quality guidelines for all formal modes of childcare, whether centre based or individual, are elaborated at national level. Structural quality is partly guided by national-level guidelines that formalise certain aspects of formal care, such as staff-to-child ratios, hygiene and nutrition practices, and staff qualifications. In England, a unifying curriculum framework applies across all types of formal provision and ensures some degree of common experience and standards, including regarding staff qualifications; the EYFS framework sets the standards that all early years providers must meet to ensure that children learn and develop well; ensures children are kept healthy and safe and ensures children have the knowledge and skills they need to start school.

In Spain, the national government establishes minimum and general guidelines for certain quality characteristics that ECEC should possess for both ECEC stages. A 2022 decree which “establishes the organisation and minimum teachings of Early Childhood Education” sets forth the principles and objectives of education, ensures the effective fulfillment of children’s rights, and defines the main elements that curricula should include. Regarding infrastructure and staffing requirements, a 2010 decree establishes a maximum of 25 children per schooling unit and sets minimum size requirements for schooling units in the 3–6 ECEC stage. Requirements for the 0–2 age group are left to the competent authorities, i.e., the regions and municipalities. The decree also establishes minimum qualifications for teachers in both stages.

In Germany, a historic effort in the national regulation of quality was made via the 2019 federal law on *KiTa-Qualitäts- und -Telihabeverbesserungsgesetz (KiQuTG*) which puts forward quality as multidimensional and including aspects related to access and affordability. In practice, the 2019 law proposes ten different “domains” ranging from availability to recruitment of qualified workers, from improvement of facilities and learning material to stronger support of language development. Each state could choose which domains to concentrate on and spend accordingly the funding made available by the federal government. The reforms have been accompanied by improvements in ECEC data collection governed at the national level that aim to capture the multidimensional dimensions of quality (more below).

In Italy too, there have been important efforts to strengthen ECEC quality dimensions by the central government in a context which remains highly decentralised. As far as the 0-2 segment is concerned, the definition, implementation and monitoring of quality dimensions remain the responsibility of municipalities and regions, yet the 2017 decree establishing the integrated 0-6 system reflects a clear intent to promote ECEC quality across the board, through enhanced coordination and educational continuity across segments and by establishing new mechanisms to ensure quality. In practice, Regions have regulatory power over the overall structural standards and administrative function of ECEC facilities. Municipalities define service management rules of both public and private 0-2 services, including directly or indirectly managed municipal 0-2 services and municipal preschools, and are responsible for the municipal-level coordination and quality promotion of the entire 0-6 system. The 2017 decree set strategic objectives relating to quality of provision, across the 0-6 system and differentiated by age-based segments. Specifically, for the 0-2 segment, it introduced: tertiary education as educators' entry qualification level and on-the-job training for ECEC staff; the three-year National Action Plan defining financial resources for the consolidation, extension and qualification of the Integrated System 06, and the National Fund that allocates them; an information, monitoring and evaluation system; the *coordinamenti pedagogici territoriali* (territorial pedagogical coordination units), aimed at coordinating pedagogical and quality features across age-based segments and providers (including private ones) at the local level; and *Poli per l'Infanzia* (educational hubs), aimed at promoting educational continuity, research and innovation across the 0-6 system.

4.3 Staff-child ratios and group sizes

Standards on minimum staff-child ratios and maximum group sizes are two of the structural features most commonly regulated for improving ECEC quality (OECD, 2025). The international consensus recommends a ratio of 1:3 for children under the age of two and a maximum of 1:5 for children between two and three years of age, in groups of no more than eight children (Eurydice, 2025; Melhuish et al., 2015).

In France, the staff-to-child ratio in daycare is regulated nationally at 1:5 for infants and 1:8 for toddlers, whereas childminders can care for up to four children under the age of six, with no additional staff. In Germany, staff to children's ratios are regulated by each federal state, making the actual practice very different from one place to the other. So, for example, in NRW the prevailing staff to children ratio for children under three is 1 to 3.7, whereas in Saxony it is 1 to 5.5. In Italy too, minimum requirements are set at the regional level and vary by child age. In the case of children 24-36 months, official staff-to-child ratio requirements range from 1:7 in Lazio and Marche to 1:10 in Piedmont, Emilia Romagna and Calabria (ISTAT, 2024). Staff-to-child ratios are usually higher in the younger age groups (up to 1:4 for children under 1 year old, in some regions). In terms of national average

ratio, it is common practice to assume an average of one educator for every 6 children in services for 0-2 year-olds (ibidem).

In Spain, the student-teacher ratios for both public and private centres providing ECEC is around 9. Over time, there has been a reduction in student-teacher ratios. Public ECEC has improved from around 9 full-time equivalent students per teacher in 2011 to 8 in 2022. Private ECEC has seen a similar progression, from approximately 11 students per teacher in 2011 to 10 in 2022.

In England, group-based providers of all types were required until 2023 to have one adult for every three children aged under two, and one for four two-year-olds. In September 2023, ratios were increased for two-year-olds from 1:4 to 1:5. Overall, there has been a worsening in ratios. The government argued that this measure would reduce costs for families, pointing to a potential reduction of 15% if providers adopted the changes and passed the cost onto parents. Meanwhile childminders can look after up to six children under eight, of which only one can be a baby (under one year) and three in total can be under five, unless they are the childminder's own children or siblings of those already looked after, in which case (as of 2023) the restrictions on the number of young children is lifted. In 2022, 11% of group-based providers in practice were operating below the statutory requirement for under two-year olds (i.e. they had fewer children than would be allowed), 22% for two-year olds and 39% for 3s/4s. Meanwhile around 5% of settings were operating at illegal levels for under twos.

Table 4.1 Staff-to-child ratio depending on the age of children until 3 years of age (maximum number of children per staff member)

Child's age	*International consensus*	*France*	*Spain*	*Germany*	*England*	*Italy*
Under 2 years	1:3	1:5; 1:4*	1:6/1:8**		1:4; 1:3*	
2-3 years	1:5	1:8; 1:4*	1:16/1:20**		1:5; 1:3*	
Overall			1:9	1:3.7/1:5.5**		1:4/1:10**

* Childminders
** Variable depending on regional regulation
Sources: Fondazione Agnelli review of multiples sources (2025)

4.4 Staff qualifications and professional development

Across the case study countries, staff qualification requirements vary depending on the ECEC age segment, type of provision and staff (see Table 4.2 and Table 4.3). Historically, staff qualification requirements for the younger age segment have been weaker and lower than those for the preschool segment, considered to be part of the education system. Recent decades have witnessed a "wave of professionalisation" – at least in terms of policy intent - of the 0-2 staff segment in most of the case study countries as part of a push to enhance the quality of ECEC 0-2 services, to recognise and

value early years providers, and, in doing so, to tackle the weak work conditions of this category (more on this below). This has been accompanied by renewed attention and resources dedicated, across the five countries, to in-service professional development and training.

Table 4.2 Staff qualifications: ECEC services for children 3-6 years

	England	France	Germany	Italy	Spain
Educators	State: Qualified teacher: ISCED 6 PVI: manager ISCED 3; half of other staff ISCED 2	ISCED 7	ISCED 6	ISCED 7	ISCED 6
Assistants		ISCED 3	ISCED 3	N/A	ISCED 3

Note: ISCED 3 = upper secondary education; ISCED 5 = short-cycle tertiary; ISCED 6 = bachelor's degree or equivalent; ISCED 7 = master's degree or equivalent
Source: OECD Education at a Glance 2020; Eurydice (2025); Fondazione Agnelli country studies (2026)

Table 4.3 Staff qualifications: ECEC services for children below 3 years

	England	France	Germany	Italy	Spain
Educators	PVI: manager ISCED 3; half of other staff ISCED 2	ISCED 6	ISCED 6	ISCED 6	ISCED 6 / ISCED 5
Assistants		ISCED 3	ISCED 3	N/A	ISCED 3
Childminders		120 hours of training		N/A	N/A

Note: ISCED 3 = upper secondary education; ISCED 5 = short-cycle tertiary; ISCED 6 = bachelor's degree or equivalent; ISCED 7 = master's degree or equivalent. PVI=private, voluntary and independent settings
Eurydice (2025) defines:

- "core practitioner" as a professional responsible for leading a group of children at the class or playroom level, working directly with both the children and their families
- "assistant" as a worker supporting the core practitioner in managing a group of children daily.

Source: OECD Education at a Glance 2020; Eurydice (2025); Fondazione Agnelli country studies (2026)

A key distinction across the countries covered here concerns the route to obtaining qualifications and type of training. For instance, while in Germany, the approach to "professionalisation" of ECEC staff has traditionally prioritised and relied on vocational schools and training, leading to a comparatively homogeneous workforce, other countries have adopted a mixed approach, though with a focus on ECEC educators holding a university degree, and thus on traditional academic routes, the case in England (to an extent), Italy and Spain. Another key distinction across countries is whether and to what degree changing ECEC staff qualification requirements are accompanied by initiatives to adjust staff pay and working conditions.

The main route to becoming an ECEC practitioner in Germany consists in a three-year full-time training in a vocational school, generally accessed after completing lower secondary school,

commonly at age 16, and after completing a shorter vocational training in a related occupation such as childcare assistant (*Kinderpflger/in*). The exact pathways and training length vary slightly across national states, but the training as educator is an occupation-specific and fully qualifying training, leading to a nationally recognised certificate. In 2022, 80% of ECEC staff held this type of vocational qualification. Besides this route, universities of applied sciences offer a Bachelor qualification in early childhood education (0–6) or childhood education (0–12). In 2023, only 6% of ECEC staff held one of these degrees or one in social work or educational studies, a percentage that has been stable over time. Among the reasons why academic qualifications have not expanded within the ECEC sector is the decision to place the bachelor's degree on the same level as the traditional vocational qualification within the National/European Qualifications Framework, and the fact that degrees are not recognised in the prevailing pay scales negotiated by trade unions. Overall, the qualification profile of ECEC staff is homogenous and well-rooted in the traditional German occupational training system.

In contrast, ECEC educator qualification requirements in Italy, and Spain, are primarily set with respect to university degrees. In Spain, since 2006, becoming a lead teacher in 0-2 ECEC requires a university degree in ECEC. There is also a VT ECEC qualification, which allows employment exclusively in the first ECEC cycle in formal settings, while this restriction is dropped for non-formal settings. There are also support assistants in both ECEC cycles, who are requested to take a course of around 600 hours. In Italy, since the mid-2000s, teaching in preschools has required a single-cycle five-year university degree in Primary Teacher Education, qualifying also for primary schools. Staff with a teaching diploma from the *Istituto magistrale* (a secondary school designed to train future teachers) obtained before 2001/2002 may still access preschool positions without a degree. For services for 0-2 years, since 2019/2020, educator positions require either a three-year university degree in Educational Sciences with an early childhood track, or the five-year Primary Teacher Education degree, if this includes or is supplemented by a 60-credit specialisation course. Since 2024, the introduction of the professional register "Order of Pedagogical and Educational Professions" requires ECEC educators to be registered as a pre-requisite for employment (as is the case for medical doctors, psychologists and social workers). Scepticism and opposition by unions, employers and Regions, along with implementation challenges linked with recruitment difficulties and qualified staff shortages (more on this below), have led to the extension of the registration deadline by one year (to March 2026) and to a relaxation of qualification requirements for register entry to take work experience into account (Decreto Legge n. 117/2025; Orizzonte Scuola, 2025).

In England, requirements vary by sector. State-maintained nurseries (for 3-4 year-olds) must have a graduate qualified teacher in each classroom. There have been limited changes to these qualification requirements over the last two decades. Efforts to increase graduate staff in private, voluntary and

independent settings and in disadvantaged areas include the introduction in 2007 of a new graduate qualification, the Early Years Professional (EYP) and the requirement that Sure Start Children's Centres in disadvantaged areas provide graduate-led childcare with the provision of a dedicated funding pot - the Graduate Leader Fund - to support settings with the cost of training and employing graduate staff. This did result in an increase in graduate numbers in private and voluntary settings, especially in disadvantaged areas. However, EYPs were never given Qualified Teacher Status, meaning status, pay and conditions remained below that of primary school teaching staff, and the policy has therefore been criticised as a missed opportunity to establish an early years route to QTS. There has also been very little attention to the quality of vocational qualifications, and to requirements for non-graduate staff, although there are vocational qualifications at ISCED 2 and 3, and minimum requirements that relate to these; one staff member in PVI settings must have a level 3 qualification, and half of other staff a level 2. In 2012, a government-commissioned review of the workforce underlined the need to review vocational qualifications as well as investing in graduate staff, but the findings were effectively ignored.

The case studies provide examples of how efforts to promote quality of ECEC services through the introduction of staff qualification requirements in the early years (0-2 segment) can encounter challenges in practice and potentially worsen staff shortages if not accompanied by initiatives to support ECEC staff status, pay and working conditions.

4.5 ECEC staff conditions of employment and labour shortages

Salaries

The average starting salary in the EU for pre-primary teachers in public institutions is around PPS 25,800 (Eurydice, 2025). For the case study countries for which data are available (all with the exception of England), in 2022/23, pre-primary teacher salaries range from 25,373 (PPS) in Italy to €34,948 (PPS) in Spain (ibidem.).[6] Moreover, in the four countries, teachers with the same minimum qualification levels of pre-primary and primary public schools record the same average starting salary (Eurydice, 2025). Beyond starting salaries, prospects for salary increases reveal differences in increases throughout teachers' careers and in the time required to reach the top of the pay range. In

[6] Annual gross statutory starting salaries (in thousands of PPS) for full-time, fully qualified pre-primary teachers (ISCED 02) in public institutions settings for children aged 3 and over 2022/2023. Comparing statutory starting salaries provides an overview of the financial conditions newly fully qualified teachers are offered. For the purpose of international comparison, salaries of full-time teachers are presented in purchasing power standard (PPS). PPS is an artificial common reference currency unit used to express the volume of economic aggregates for the purpose of spatial comparisons in such a way that price level differences between countries are eliminated (Eurydice, 2025).

the EU, the average increase in a pre-primary teacher's salary between the start of their career and the top of the pay range is around half of the starting salary (56 %). This progression is below the EU average in Spain (43,4%) and Italy (45,8%) and above, in Germany (62,5%) and France (68,3%). When taking the time required to reach the top of the pay range into account, France and Germany are classified as countries with "Major increase during career and during first 15 years", Italy and Spain as countries with "Modest increase during career and reaching maximum after a long time" in terms of "potential salary increase" for pre-primary school teachers in 2022/23.

Beyond EU-level comparative figures of pre-primary school teachers in public institutions, the case studies highlight:

- comparatively low salaries of ECEC staff with respect to the wages of staff of later education segments, and close-to or below minimum wage benchmarks and average salaries in other sectors (in the early 0-2 years phase in particular);
- lower average wages among ECEC staff of private providers relative to public sector workers;
- recent trends indicating a decline in real ECEC staff wages.

In Germany, ECEC staff earn considerably less than primary school teachers: in 2023, among those working full-time, the median monthly gross pay was €3,749 compared to €4,694 of a primary teacher. For further reference, the median monthly gross pay of specialised metal worker, whose entry training is of the same length of that of an ECEC educator, was €3,993, whereas the median pay across all occupations was €3,796. Although ECEC workers do not belong to the 15% of workers who are on low pay, defined as earning less than 2/3 of the median worker, actual monthly ECEC staff earnings are much lower, as 60% work less than 38,5 hours. This reflects not only the fact that 92% of workers are women, but there is also indication that working part-time is a coping strategy to occupational stress and job strain.

In Spain, in 2023, public lead teachers earned an average of €2,433 per month, with salaries ranging from €2,300 to €2,900 across ACs. While this average wage is 25% above the median wage in Spain for the same year, educators and support assistants in these settings earn lower salaries, typically close to the national minimum wage, which is approximately 60% of the median wage. In terms of trends over time, ECEC workers in Spain experienced a decline in real wages: since 2010, the real wages of lead teachers across all ACs have declined by 13% between 2010 and 2024. This decline is largely attributable to stagnant gross wages under collective agreements between 2010 and 2019, in the aftermath of the 2008 economic crisis and within the context of austerity policies.

In England, using the Childcare and Early Years Providers Survey for 2021, a study cited by the national report finds that median hourly pay on average across group-based providers was £9.40. Around 17% of workers are paid at or below minimum wage. Also, an analysis of the Labour Force

Survey for England found that retail workers and childcare workers have very similar levels of pay, with one in four workers leaving childcare citing pay as the cause, compared to one in six retail sector workers.

In Italy, according to an analysis of the main current National Collective Agreements (NCAs) in the public and private ECEC sectors conducted for this study in the Italy country report, in 2025 the gross statutory base monthly entry salary ranges from €1,445 to approximately €2,250 for daycare educators and from €1,445 to just over €2,460 for preschool teachers. Average wages in ECEC are lower than in the upper levels of the education system, with the exception of teachers in state pre-schools, whose salaries are aligned with those of state primary school teachers. Over the previous decade, the freeze on collective bargaining in the public sector from 2010 to 2016 (de facto until 2018), together with the corresponding lack of agreement renewals in the private ECEC sector, led to a loss of real purchasing power for workers in the sector. This decline has only been partially offset by the contract renewals following the freeze and by the most recent agreements.

An important development in the latest round of collective bargaining renewals in Italy has been the relative upgrading of daycare center educators. Since the early 2020s, educators in daycare centers typically earned less than preschool teachers (from gross €90 to €200 less at entry level), reflecting differences in qualification requirements and contractual classification levels. Following the introduction of the mandatory bachelor's degree requirement for daycare educators, the most recent collective agreements provide for the reclassification of graduate educators at the same contractual level, and therefore on the same pay scale, as preschool teachers. These provisions do not apply to non-graduate educators, who remain at a lower classification and pay level under most NCAs. However, given staff turnover and mechanisms for progression to higher classification levels in several public and private agreements, the latest contract renewals are leading to a general improvement in the relative wage position of daycare center educators vis-à-vis preschool teachers and other educational levels.

Average ECEC staff salaries vary depending on the type of provider, with private sector staff earning on average lower wages compared with staff of public providers in England, France, Spain and Italy. In France, childminders typically earn less than creche staff. In England, pay in the maintained sector is more tightly regulated, so wages tend to be higher than in the private sector, where the only binding constraint is minimum wage legislation. In 2021, the median hourly pay in school-based providers (i.e. maintained sector settings) was £12.7, compared to £9.5 in voluntary sector providers and £9.3 in private providers. Nearly one quarter (24%) of workers in the private and voluntary sector are paid at or below minimum wage, compared to 11% in school-based providers. A 2023 survey finds that 15% of voluntary sector staff and 10% of private sector staff are paid *below* minimum wage, along with 5% of workers in the maintained sector. In Spain, compared to public sector workers, lead teachers in subsidised and private schools earn between €500 and €900 less per month, depending

on the region. In some ACs, such as Catalonia, salaries for subsidised schools are regulated, with lead teachers earning €1,677 per month, slightly above the national average for this category. In Italy, wage differentials between the public and private ECEC sectors have historically been significant and the analysis of current NCAs conducted for this study confirms these disparities (see country report for Italy). For educators in daycare centers, in terms of gross base monthly entry salary, the gap between the public Local Government NCA and the main private-sector agreements ranges from €400 to €800 per month, in 2025, depending on the private NCA considered for comparison. For preschool teachers, this difference can reach up to €1,000 gross per month when considering the statutory base entry salary of state preschool teachers, which is approximately €200 higher than that of municipal preschool teachers. These differences may be partially offset, though not necessarily, by the greater scope for wage supplements available through second-level collective bargaining in the private sector, where such arrangements are in place.

Moreover, public ECEC services generally offer more favourable work conditions for employees across the case studies in terms of number of hours worked and opportunities for continuing professional training. In England, daycare facilities offer relatively easier work hours than childminding (36 hours a week on average for a staff in a daycare center, versus 51 hours per week for a childminder), and more opportunities for continuing professional training, which can be challenging to access for childminders. At the median, private sector workers are working 40 hours per week compared to 32.5 hours in the maintained sector. In Italy, weekly working hours differ across collective agreements. In the public sector, municipal ECEC staff work 36 hours per week, while state preschool teachers have a 25-hour weekly teaching load (plus 80 annual hours for internal organisational activities). In the private sector, weekly working hours range from 34 to 38 hours, depending on the collective agreement applied. Public-sector NCAs provide for 30–32 days of annual leave, whereas the main private-sector agreements provide between 26 days (the most prevalent arrangement) and 34 days, according to NCA documents.

Low salaries and working conditions – limited opportunities for career progression, demanding nature of the job, lack of flexibility - are associated with high staff turnover in the ECEC sector, and higher turnover rates in the private sector, across the case study countries. These circumstances have triggered mobilisation in the sector in several countries. In Spain, private sector ECEC workers supported by leading unions called for strikes in 2023/24, receiving widespread support and leading to union-employer negotiations on wages and working hours. In Italy, although the introduction of higher qualification requirements is associated with an improvement in contractual classification and pay, the establishment of the professional register, as outlined earlier, triggered mobilisation of workers, employers and unions to request greater flexibility in accounting for staff work experience and in registration deadline requirements.

Labour shortages

Currently, most European countries report shortages of ECEC core practitioners (Eurydice, 2025). Labour shortages associated with a combination of factors mentioned above, including unfavourable working conditions, low salary and limited career prospects and increasing qualifications requirements, are recorded in all five countries. In terms of scale of the problem, available evidence indicates:

- In France: it is estimated that about 10,000 posts have been vacant for more than 3 months in the daycare sector, or about 10% of the total size of the sector, and that over 100,000 childminders will retire before 2030. Unfilled vacancies in the daycare sector are unequally distributed geographically, and are particularly problematic in the Ile de France region, corresponding to about 3% of the total slot volume, and least in Brittany, corresponding to 1,3% of slots.
- In Spain: trade union estimates for the 2024-25 academic year indicate a shortage of 14,160 lead teachers in ECEC and primary levels to cover the reduction in staff since 2010 and reduce temporary contracts from 21% to 8% of the total educational workforce. This issue has become a growing concern among professionals, trade unions, and the media. Significant staff shortages are reported in regions such as Andalusia, Valencia, the Canary Islands, and the Balearic Islands.
- In England: across all setting types, recruitment appears to have become more difficult. An online 2023 survey of early years staff referred to a “recruitment crisis”, with respondents in all sectors saying the difficulties of recruiting staff had roughly doubled since before Covid. According to the survey results, the number of level 3 vacancies in the sector increased from an average per setting of 1.9 to 2.2 between 2022 and 2023 with an average length of 10 weeks to fill a vacancy. These problems appear much worse for private, voluntary and independent (PVI) providers. In the 2023 Childcare and Early Years Providers Survey, 49% of PVI settings and 25% of schools had a current vacancy, while 34% of PVI settings reported receiving no applications per vacancy, with a further 32% receiving only one or two applications. These numbers were much lower - 7% and 28% - for school-based providers.
- In Germany: the 2023 report on staff in ECEC indicates an annual average of almost 15,000 reported vacancies in the sector, with around 2% of vacant positions going unfilled. It is expected that these staff shortages will intensify as the universal entitlement to an after-school place comes into force in the 2026/27 school year and as afternoon services operating from lunchtime onwards are to be staffed by educators, the same occupational category that works in ECEC centres. It is estimated that roughly 33,000 educators will be in demand to care for primary school children. Analysis of administrative data from 2013 to 2018 on vacancies in ECEC and after-school services point to increasing difficulties in filling positions,

mostly due to lack of applicants. Similar problems emerge from the latest report on the *Gute Kita Gesetz*, according to which in two thirds of ECEC centres there had been a job quit, mostly for another job within the ECEC sector; furthermore, one third of centres heads reported it had taken them more than six months to fill any vacancy. The Bertelsmann Foundation has calculated that to achieve everywhere a staff to children ratio of 1 to 4 for children under three and 1 to 10 for children aged three and above, 100,000 more educators would be needed. By the same token, if more places are to be created so that supply meets demand, more staff will be needed.

- In Italy: public and private employers as well as unions across both 0–3 and 3–6 ECEC services are reporting worsening staff shortages. Assuming an average educator-to-child ratio of 1 to 6, an additional 25,000 educators will be required in the coming years. Yet, in 2022, only 7,790 graduates obtained a bachelor's degree in *Educational Sciences* across all specialisations (early childhood, adult education, social education, etc.) and over 30% of these graduates are already employed.

Pedagogical practices and curricula

Educational guidelines for ECEC are increasingly adopted by countries across Europe (Eurydice, 2025). However, they tend to be more common for settings for children aged 3 and over than for younger children. A quarter of education systems do not provide educational guidelines for those under 3 (ibidem). The content of these guidelines varies, but they generally include developmental or learning goals and pedagogical principles, in some cases in the form of a standard curriculum.

Table 4.4 Early years ECEC quality (below preschool): pedagogical guidelines and curricula

	England	France	GermanyGermany	Italy	Spain
Pedagogical guidelines	No	Yes, national	Yes, national framework	Yes, national	Yes, national
Curriculum	Unifying curriculum framework	No	*Länder* have their own, mostly outlining broad principles and activities	No	Regional discretion

Source: Fondazione Agnelli country studies (2026)

The experience of the case study countries varies depending on whether pedagogical guidelines or curricula are in place and the prevailing pedagogical approach. In terms of direction, two countries with highly decentralised early years ECEC systems, Italy and Spain, have in recent years undertaken initiatives to promote minimum common pedagogical approaches and standards at the national level, through national pedagogical guidelines and frameworks (see also below).

In France, preschool curricula are nationally designed, regulated and teachers' training funded by the Ministry of Education. In contrast, there are no curricula before the preschool years. Pedagogical

guidelines for the early years established in 2021 are not extensively disseminated to staff, who largely lack knowledge of them. Moreover, such guidelines are not binding. Existing regulations focus on structural dimensions; there is little regulation of process quality criteria.

In Germany, where ECEC services are separate from the school system, a national ECEC common education framework serves as a reference for *Länder* that develop state-level ECEC curricula (Eurydice, 2025b) in the form of mostly broad guidance documents rather than ones specifying specific activities and competences. The prevailing pedagogical approach in ECEC centres has historically been the "situation approach" (*Situazionansatz*), which emphasises how learning arises from the spontaneous interaction between child and the environment. It is framed around child-led, play-based activities, rather than structured teaching situations.

In England, all settings catering for 0 to 5 year olds, including childminders, are bound by the Early Years Foundation Stage Curriculum (EYFS), a distinct curriculum for young children extending into the first year of primary school (reception class). Initially introduced in 2007, the EYFS specifies learning and developmental objectives across seven areas: communication and language; personal, social and emotional development; physical development; literacy; mathematics; understanding the world; and expressive arts and design. Despite early concerns about "schoolification", once rolled out the EYFS was received favourably as play-based and child-centred. In 2012, the EYFS was slimmed down, replacing 69 learning outcomes with 17, reducing the administrative burden. A further reform in 2021 increased the focus on early language and extending vocabulary and sought to reduce reporting requirements further. The EYFS also contains four guiding principles to shape practice in the early years, in summary: that every child is a unique child; that children learn to be strong and independent through positive relationships; that they need enabling environments with adults who respond to their individual interests and needs and help them build their learning; and that they develop and learn at different rates. The play-based EYFS curriculum ensures some consistency across settings and is generally popular with practitioners, but evidencing each child's progress creates an administrative burden, and differences in the skills and qualifications of staff, and in the physical environment, mean wide differences in children's experience in practice.

In Spain, in line with the acknowledgment of the 0-2 stage as a crucial educational stage alongside the 3-6 segment, recent national efforts aim to regulate and standardise pedagogical practices and curricula across the two cycles. The 2022 Royal Decree (RD 95/2022) establishes minimum teaching standards for ECEC, recognising it as a distinct educational stage, organised in two cycles (0–2 and 3–6), both aligned with the same educational objectives. For the first time, this legislation defines the goals, objectives, and general pedagogical principles for the entire 0–2 stage, along with the key competencies to be developed from the outset of schooling (RD 95/2022). The law sets out a series

of general principles, pedagogical guidelines, and basic competencies to be achieved. However, the responsibility for defining the curriculum for the entire ECEC stage lies with regional educational administrations. The competencies outlined in the framework serve as guiding objectives for the first cycle and as regulatory foundations for the second.

Italy, a country with a rich history of internationally recognised ECEC pedagogical practices at regional or municipal level (such as those of the municipality of Reggio Emilia), has also taken significant steps at the national level to guarantee basic common pedagogical practices across the 0-6 ECEC system. The 2017 reform provides common tools for pedagogical and didactic guidance across 0-6 services. Building on this reform, the 2021 “Pedagogical Guidelines for the Integrated 0-6 System” (Ministerial Decree of November 22, 2021, No. 334) provide a general framework for integrating services for children aged 0 to 6. For services catering specifically to children aged 0–2, the 2022 National Guidelines for Educational Services for Early Childhood (Ministerial Decree of 24 February 2022, No. 43) provide the first comprehensive national pedagogical framework applicable across all providers and regions. These Guidelines partially bring ECEC services for children under the age of 3 closer to preschools, for which the national guidelines have been in place since 2012. Unlike services for children aged 0–2, the latter define a curriculum, which is structured around five “fields of experience” and grants preschools a high degree of pedagogical autonomy. The Early Childhood national guidelines represent an important step towards the definition of nationally-established explicit goals in terms of children's well-being, development and learning. Such initiatives have been accompanied by efforts to enable their implementation, including through figures and entities such as the *pedagogical coordinator* and the *territorial pedagogical coordination units*. Every ECEC service is expected to have an internal or external pedagogical service coordinator, responsible for overseeing educational plans and, within the integrated system, for ensuring pedagogical continuity across the 0-2 and 3-6 segments. Service coordinators are required to participate in local networks of coordinators via the territorial coordination units, which aim to strengthen ECEC service coordination and quality monitoring within and across neighbouring municipalities.

ECEC quality monitoring and policy evaluation

Across the five countries, quality monitoring of early years ECEC has historically been weaker than that of preschool and other school stages. Moreover, in those countries where some form of monitoring has been underway, the focus has traditionally been on inputs and structural dimensions of quality, rather than on process dimensions and outcomes. ECEC monitoring efforts include approaches linked to the regular administration of services, service census or survey data collection initiatives and regular inspections by an authorised entity. Monitoring initiatives and requirements commonly vary by type of provider. Across the countries reviewed here, mechanisms to enable the

use of monitoring efforts to improve policy and service quality appear to be largely absent, meaning that one of the key motivations for service monitoring – service improvement – remains unmet. With regards to policy evaluation and ECEC impact on children's outcomes, initiatives and evidence are limited in the countries under review.

In France, oversight of early childcare services is primarily the responsibility of the Maternal and Child Health Services (*Protection Maternelle et Infantile*, PMI), which are funded and managed at the *département*, district, level. Daycare centers are strictly regulated by the Public Health Code and cannot operate without prior authorisation from local authorities—whether at the district level for private facilities or the municipal level for public ones—after an accreditation process led by the PMI. Inspections include observations, interviews, and self-assessments. For childminders, the PMI is also responsible for monitoring that national standards are met. However, in practice, the PMI's capacity to perform regular and thorough inspections is limited. The heavy workload associated with reviewing applications for daycare creation or extensions, operating licenses, and modification of daycare facilities often constrains their ability to conduct regular quality inspections once centers are open or the operating license is granted. In France, while structural quality guidelines for all formal modes of childcare, whether center based or individual, are available and elaborated at national level, there is limited regulation of process quality criteria: there is no curriculum before the preschool years, and pedagogical guidelines are not binding. This is reflected in evaluations of early childcare quality, which are carried out by local child protection agencies and are focused on structural quality, with no data available on process quality (there is no national framework for assessing process quality). There are no top-level binding directives on how evaluations should be carried out, nor their frequency, the involvement of stakeholders such as parents, nor the type of data collected

In England, regular inspections of all registered ECEC settings, including centres and childminders, are carried out by the Office for Standards in Children's Services, Education and Skills (Ofsted). Pre-school quality ratings by Ofsted usually incorporate elements of both structural and process quality, i.e. they take into account the child's experience in the setting as well as the setting's inputs. While this approach seems effective at protecting against very low-quality provision, it does not ensure that quality is high or provide a framework for quality improvements. Ofsted inspections assess whether settings are meeting national regulations on staff-child ratios, staff qualifications, health and safety and other policies as well as observing the interactions between children and carers and the extent to which children are meeting the early development goals set by government. Ofsted ratings have been used in evaluation studies of service quality-child outcome links.

At the end of reception year (age five), teachers complete an 'Early Years Foundation Stage Profile' for each child. The child's development is assessed as 'emerging', 'expected' or 'exceeding expectations' on each of the 17 EYFS goals, and an overall judgement is made of whether the child

has a ‘good level of development’ (or is still ‘emerging’). A ‘good’ level requires a child to be at the expected level in the 12 goals relating to communication and language; personal, social and emotional development; physical development; literacy; and mathematics. These judgements are communicated to parents and used as a baseline for assessing children’s later learning in primary school. The EYFS profile results also provide a check on how well each cohort of children are doing, and a way to examine gaps in development by socio-economic background, gender, ethnicity and geography.

In Germany, emphasis in ECEC system monitoring is on inputs rather than outputs and outcomes, and on structural indicators designed to capture aspects of provision that are subject to legislative reform. Investments in early education and childcare data collection have been made over the years. Since 2006, a census of all ECEC centres takes place annually, detailing centre-characteristics, information on each child attending, as well as each person employed. Since 2008, an annual survey on childcare is carried out by the German Youth Institute. It currently surveys approximately 33,000 parents of children up to age 10. Finally, since 2019, data are collected on the entire ECEC system, including a survey of providers, local administrators, ECEC centres staff and leaders, parents, and children. This monitoring system is now in its third round. In contrast with other examples reviewed here, ECEC practice observation and rating are broadly non-existent and are absent from institutional reporting.

In Italy, the 2017 reform assigned the central government responsibility for developing a national information system covering all 0–6 services. The details of how this national 0-6 system is to be realised, including the harmonisation of existing data collection efforts and databases across the early years below 3 and the preschool 3-6 segments, remain however unclear. In terms of administrative data, two entirely separate national information systems operate, one for preschools (3-6 years) and schools and one for 0-2 years ECEC services, the latter only implemented in part. Information on preschools is collected by the Ministry of Education through the SIDI (*Sistema Informativo dell’Istruzione*), which includes structural, organisational, financial, staff, and student data. SIDI data are provided by regional offices of the Ministry and directly by schools. For 0–2 services, data collection is supported by SINSE (*Sistema Informativo Nazionale dei Servizi Socio-Educativi per la Prima Infanzia*). However, participation by regions has been uneven, concentrated in the Centre and North macro areas. Access to data collected by schools and elaborated by regions depend on regional rules.

Beyond administrative databases, starting in 2025-26, Italy’s National Institute for School Evaluation, INVALSI’s, Schools Self-evaluation Report, *Rapporto di Autovalutazione,* or RAV, has been extended to and made mandatory for all preschools with the “RAV Infanzia” (an adapted version of the national school RAV tool). The RAV Infanzia comprises 42 indicators across four areas: context, outcomes

(as perceived by teachers), educational processes, and organisational/teaching processes. It promises to yield relevant information on processes dimensions as well as structural ones, even within the limitations of self-assessment approaches. At the national level still, essential information on early years childcare is collected by Italy's National Statistical Office, ISTAT. Since 2011, an annual web-based survey of ECEC public and private providers at municipal level is carried out and, since 2013, this includes an annual census of ECEC services, collecting information on number of places, service type and cost. Moreover, commencing in 2020, three special surveys of early years (below 3) ECEC services were implemented, investigating specific themes in greater depth, notably: in 2020/21 the impact of the Covid pandemic on ECEC services, in 2021/22 inclusivity of ECEC services, in 2022/23 ECEC staff and conditions of employment, and in 2023/24 on ECEC governance and organisational approaches (ISTAT, 2025). Throughout, the prevailing focus has been on inputs and structural factors – staff numbers, costs, users, and structures – rather than processes, outputs, or outcomes.

Beyond national level initiatives, monitoring and evaluation efforts exist at the local level in Italy, often in experimental fashion, reflecting diverse and fragmented realities and initiatives across regions and municipalities. These include the implementation of long-standing instruments such as SOVASI (Scala di Osservazione e Valutazione della Scuola dell'Infanzia) and AVSI (Autovalutazione della Scuola dell'Infanzia), both adaptations of the ECERS (Early Childhood Environment Rating Scale) and international tools such as ITERS-3, ECERS-3, or CLASS. On ECEC for children under the age of 3, local initiatives are typically based on self-assessment and rely on scales adapted from international models such as SVANI (Scala per la Valutazione dell'Asilo Nido) and ISQUEN (Indicatori e Scala di Valutazione della Qualità Educativa del Nido). Region-wide experiences include those of Tuscany, which has developed its own quality evaluation system for services for children under 3 (in 2015) and Emilia-Romagna (2016). In Emilia Romagna, the regional government, the regional offices of the Ministry of Education, and the University of Bologna have jointly promoted a project (2022-2025) aimed at defining a framework for quality and its evaluation within the services of the integrated 0–6 system. Moreover, several regions refer to quality evaluation within their regulatory frameworks for the accreditation of services for children under the age of 3. Eleven regions require the implementation of instruments and tools for quality evaluation, although references to this obligation typically remain generic.

In Spain, while the national education law LOMLOE (Ley Organica, 3/2020) provides a general framework, ECEC evaluations remain limited. At the 3–5 stage, evaluation is more standardised compared to the earlier years segment, focusing on quality in terms of competencies acquired by children. At the end of this stage, individual reports are prepared for the transition to primary school, but there is no systematised external evaluation. As a result, there is no transparent monitoring of children's outcomes across regions. For the earlier years, almost all regions include both internal

and external mandatory evaluations conducted by inspectors from regional education departments. Yet schools mainly carry out self-assessments, while regions do not publish inspectors' reports. Beyond administrative evaluation, few studies have been conducted by external agencies or researchers. Existing studies consistently find low quality in the early 0-2 years stage. The most recent available report, of 2012, highlighted deficiencies in developmentally appropriate activities and instruction, with high student-to-staff ratios linked to lower-quality language modelling, teacher feedback, and personal care routines. At the same time, the study noted a positive classroom climate and constructive relationships with families.

4.6 Policies in support of ECEC quality

Initiatives across the five countries in support of ECEC quality, as highlighted by the previous paragraphs, include: the establishment of minimum quality requirements (most commonly with respect to structural dimensions such as staff:child ratios, staff qualifications and space requirements); the adoption of ECEC pedagogical guidelines and/or curricula; administrative operating requirements and related regular inspections; and ECEC monitoring data collection efforts on quality dimensions.

The experience of the five countries also identifies key challenges and related enabling factors to promoting ECEC quality, notably:

- the need to accompany increasing staff educational requirements with improved ECEC sector working conditions and diversity;
- adequate financial resources for sustaining investments in quality dimensions;
- establishing or strengthening monitoring and evaluation feedback loops and frameworks to ensure relevant information informs ECEC policy discussion and design.

All five countries experience a tension between expanding ECEC coverage and maintaining or strengthening service quality. This trade-off arises from a combination of interlinked factors, including ECEC financing arrangements, staff working conditions, staff formation and training pathways, and related staff shortages. While the expansion of high quality ECEC services requires more and better-trained staff, ECEC staff training programmes and ECEC sector working conditions may not favour such requirements. To cope with staff shortages while addressing pressures to expand service provision, several countries report decreasing early years ECEC staff:child ratios and / or lowering educational requirements for ECEC staff, at least temporarily.

For example, due to recruitment difficulties, in France, ECEC staff educational requirements, previously set at ISCED 7, have been lowered to ISCED 6 for staff working with older children (aged 3-6 years) for the period 2023-2026. In England, requirements to have graduate-led provision in

some centres in disadvantaged areas have been lifted and dedicated funding pots abolished. Meanwhile, adult:child ratios for two-year-olds were relaxed to 1:5 in 2023 to help keep costs down and create more places. More generally, in England, recent investment in ECEC has gone into extending subsidised hours rather than quality improvement.

Strategies for addressing the ECEC staff shortage challenge, include: "*improving working conditions, career prospects and remuneration, by providing regular upskilling and reskilling possibilities, by developing creative recruitment strategies, and by calling on different under-represented groups to join the ECEC workforce, such as men and persons from various cultural backgrounds, for example migrants and refugees*" (EC Recommendation, 2022).

Germany's system of vocational training, recognised and built into pay scales, is one of the cornerstones of quality ECEC provision. The system relies on a mostly public system of vocational schools which favours links between vocational schools and ECEC centres. In England, a graduate qualification, the Early Years Professional (EYPs), introduced in 2007 with the aim of getting graduate staff into all PVI settings, alongside requirements for Sure Start Children's Centres in disadvantaged areas to offer graduate-led childcare and a dedicated funding pot – the Graduate Leader Fund – set up to support settings with the cost of training and employing graduate staff, resulted in an increase in graduate numbers in PVI settings, especially in disadvantaged areas. However, EYPs were never given Qualified Teacher Status (QTS), meaning status, pay and conditions remained below that of primary school teaching staff, and the policy has therefore been criticised as a missed opportunity to establish an early years route to QTS.

Initiatives to diversify the ECEC workforce and introduce training opportunities in France, include the initiative "*Les métiers n'ont pas de sexe*" ("Jobs have no gender"), aimed at addressing the gender imbalance and making the sector more attractive and diverse; financial support to students of initial ECEC training; and the *Pacte Enfance* ("Pact for childhood") a continuing professional training programme for 600,000 professionals, although this was revised to 200,000, and only 50,000 professionals have in practice received training under this programme to date.

As already mentioned, in Italy, the 2017 ECEC reform introduced policy measures aimed at enhancing quality. Beyond these measures, and indirectly supporting them, it is worth noting that initiatives to improve wages and working conditions, intended both to retain staff and, above all, to attract younger workers in a context of rising qualification requirements, have largely been undertaken by the social partners. In particular, in 2024 social cooperatives, the main non-public employer in the sector, signed a new National Collective Agreement providing for a substantial increase in pay and improvements in working conditions.

Public financing of ECEC quality dimensions is central. In Germany, the 2019 federal initiative – so-called “Good ECEC-centre law” (*Gute Kita Gesetz*) –provided €5,5 billion for three years to improve quality, with States requested to choose investments within the following domains of quality: provision that matches needs, good children to staff ratios, recruitment and retention of qualified staff, strong ECEC centres leaders, child-friendly spaces, healthy growth, language development, strong childminding, stakeholders networks for more quality, diversity and inclusion in pedagogical work, reduced fees.

In other contexts, spending cuts hamper efforts to step up service quality: in England, local authorities previously played an important role in providing continuing professional development for ECEC workers and ongoing support with quality improvements between Ofsted inspections, but their duty to do so was lifted in 2014, while funding for local authority early years teams has also been tightly restricted. This has left no systematic system of support for improving quality in ECEC settings, leaving stand-alone nurseries at a particular disadvantage.

Especially with respect to the early years (below 3 years), the experience of the five countries shows that efforts to use information on service quality to address quality shortcomings, for instance through established monitoring and evaluation feedback loops into policy discussion and design, remain limited or non-existent. Establishing or strengthening frameworks to ensure information is used to strengthen quality is key.

5. ECEC costs and financing

Affordability of ECEC services, especially for children below 3 years of age, remains an important issue. It emerges as a major barrier to access only in some countries and for some households. Differences in how ECEC policies are funded and in measures directed at mitigating household costs are one reason for such heterogeneity. Beyond cross-country differences, the fact that regions and municipalities, practically everywhere in Europe, have some leeway in regulating ECEC access criteria and fees, leads to within-country differences. Fundamentally, governments in the countries reviewed here support household ECEC costs through two mechanisms: supply-side funding, providing financial support to ECEC providers, and demand-side funding, providing financial support to households. Both mechanisms can be used simultaneously in an integrated manner or adopted as alternatives.

5.1 Supply-side financing policies

Reconstructing and comparing fees for ECEC services across countries is not straightforward for several reasons. First, countries differ in whether, and at what age of the child, ECEC services become free of charge. Second, as stated above, there is often significant intra-country variation in the rules regarding access criteria and fees, which depends on the decentralisation of regulation decisions at the regional and local levels. Such rules and related fees also vary depending on specific household characteristics, typically by income level and/or employment status. Furthermore, the variation in rules and fees across municipalities and regions also reflects that, in all five countries, regions and local authorities co-finance ECEC services and have some discretionary powers regarding their level of investment.

In France and Italy, public ECEC services become free to households when children attend kindergarten (usually at age three). Before this age, fees are charged, and these vary according to regulations adopted by sub-national authorities, which differ often across municipalities and according to household characteristics. In Spain, as in France and Italy, there are no fees for children attending kindergarten. However, for children under the age of 3, while some regions, such as Aragon and Cantabria, do not charge fees, others, like Andalusia and Navarre, do.

Germany and England present a more fragmented situation. In Germany, some *Länder*—such as Berlin, Mecklenburg-Western Pomerania, and Hamburg offer free ECEC to all children (in the latter case, 25 hours a week are offered for free; if longer hours are required by parents, they pay according to their income). In Rhineland-Palatinate, ECEC is free from age two. Bremen, Hesse, and Lower Saxony waive fees from age three. North Rhine-Westphalia and Thuringia provide free ECEC to all children during the final two years before primary school. In contrast, ECEC is not free in Baden-Württemberg, Bavaria, Saarland, Saxony, Saxony-Anhalt, and Schleswig-Holstein, though fee reductions or subsidies are available. Finally, households in receipt of social assistance or refugees are exempt from paying fees nationally in Germany.

England has a highly articulated system. There are three supply-side subsidies that, in principle, provide several 'free' weekly hours depending on child age, household income and employment status:

- *Universal free entitlement*: 15 hours per week free provision for 38 weeks per year for all three- and four-year-olds, from the term after the child turns three until starting full-time school.

- *Extended entitlement for working parents*: an additional 15 hours per week free provision for 38 weeks per year for all three- and four-year-olds who have both parents (or a lone parent) earning at least the equivalent of 16 hours per week at minimum wage, but less than £100,000 per year. As of September 2025, the extended entitlement for working parents covers a funded 30 hours per week (38 weeks per year) for children from the age of nine months.
- *Targeted two-year-old offer*: 15 hours per week free provision for 38 weeks per year for disadvantaged two-year-olds. When introduced this covered those in the bottom 40% of the income distribution. By 2022/23 only an estimated 27% of children were eligible because of the tightening in the coverage of the working-age benefits that provide access to the places.

5.2 Demand-side financing policies

Demand-side policies have become increasingly important over time and pursue several objectives. One goal is to foster 'freedom of choice', allowing parents to select among different types of services. Another is to target funding to areas with a higher concentration of ECEC users, effectively aligning public funding with demand. Another, still, is to channel resources to specific population sub-groups and potential ECEC users.

All five countries employ demand-side tools. There are two main types: cash transfers to households explicitly supporting ECEC costs and tax expenditures. Among the five countries, Italy uses both tools, whereas the others tend to favor one or the other—France and England primarily use cash transfers, while Germany and Spain primarily rely on tax expenditures. Reliance on alternative measures may not be neutral in terms of redistributive outcomes. Moreover, design details matter. Tax expenditures, if not carefully regulated, tend to favour higher-income households compared to direct cash transfers, because the former require the household's financial capacity to spend first and, afterwards, to ask for lower taxation. Cash transfers hold potential in terms of reaching the most disadvantaged households. However, they also vary by degree of progressivity and exclusionary risks depending on design details (Bastagli et al., 2021; more on this below).

Regarding cash transfers, France offers an early childcare subsidy (the '*Complément de libre choix du mode de garde*') to parents who hire a childminder or use private daycare services. In England, two means-tested cash transfers support households in meeting childcare costs. The 'Childcare element of Universal Credit' allows families receiving Universal Credit to reclaim up to 85% of childcare costs, up to a maximum of £1,015 per month for one child and £1,739 for two or more children. Through the 'Tax-Free Childcare' scheme, available to households not receiving support through Universal Credit, families can save into an account for childcare expenses and receive a government top-up of 20%, up to a maximum of £2,000 per year.

In Italy, the means-tested '*Bonus Asilo Nido'* reimburses part of the fees paid by families for public or private formal childcare services for children under 3 years of age, with maximum reimbursements ranging from €1,500 to €3,000 annually, and up to €3,600 for households with a newborn and low income. In 2023, approximately 480,000 children benefitted from the *Bonus*; around 38% of all children between the ages of 2 and 3 years (INPS, 2024). On average, it reimbursed 62% of ECEC fees paid. Beyond this measure, which directly supports households in meeting formal childcare costs, the 2021 introduction of the single 'Universal Allowance for dependent children' (*Assegno Unico Universale per i figli a carico, AUU*) marked a step forward in the rationalisation and integration of tax and transfer measures in support of households with children. INPS (2024) indicates that the 50% AUU increase for children below age 1 (and below age 3 for low-income large families), together with the *Bonus Asilo Nido*, fully covered ECEC fee-related costs for *Bonus* and AUU recipient households using ECEC services in 2023.

In addition to national level measures, several regions in Italy implement local schemes (often means-tested) supplementing national transfers. These regional schemes vary widely in terms of regulation and generosity. For instance, in Lombardy, the program "*Nidi Gratis*" (Free day-care centers), introduced in 2016 and financed through ESF resources (€20 million for the year 2024/25), appear to have been effective in supporting ECEC participation: in a 2018 survey of beneficiaries, almost a quarter of respondents declared that without the benefit they would have not used the service, while 44% declared that they would have reduced service use. In Lazio, a similar regional financial contribution ("Bonus Nido"), introduced in 2020, covered up to a maximum of €400 per month in 2024-25.

Tax expenditures for ECEC costs target various beneficiaries across three countries. In Spain, both central and regional governments offer such benefits, primarily targeting working mothers. The central government provides a tax credit of up to €1,000 for working mothers to cover ECEC expenses in formal daycare centers, including schooling and related costs like school meals. This is in addition to an existing tax credit of €1,200 per child under three, available to working mothers. There is no maximum income limit to qualify for these credits. Additionally, many regions provide their own tax credits for ECEC costs, separate from those for newborns or children under three. In 2023, twelve out of seventeen regions offered ECEC-related tax benefits, with an average deduction of up to 27% of ECEC costs, capped at €560 annually per child. Eligibility typically requires an annual income of up to €27,815, with the average regional taxable income at €22,563 in 2022—meaning these credits generally benefit households with incomes up to approximately 20% above the regional median. In Germany, about two-thirds of ECEC fees are tax deductible up to €4,000 per year per child. This benefit predominantly favors middle- and high-income households. Italy has a long-

standing tradition of ECEC tax expenditures, though their significance has diminished, after being largely integrated in the 'Universal Allowance for dependent children'.

5.3 Households' financial burden between fees and net costs

Given the supply-side and demand-side funding policy tools, how expensive is it for households to access ECEC? How do ECEC fees and costs vary by household type? To provide a picture as comprehensive and accurate as possible across and within country contexts, types of households and services, we triangulate information from three sources: the OECD Family Database, Eurydice (2025) and findings from our own (local) case studies.[7]

According to the OECD figures, see Table 5.1, Germany, and Italy are the two countries where households utilising ECEC services in practice do not bear any net cost for such services. In the German case, this is because ECEC fees are waived almost universally, whereas in the Italian case this outcome is the result of (high) fees compensated by (comparatively high) household income-support measures for ECEC service users. In comparison, families in France and Spain bear a moderate-high net cost, while in England, especially couples, pay a high net cost (22% of their family net income).

These estimates provide an indication of the ECEC costs borne by households yet have some critical shortcomings. In the case of Germany and Italy, the OECD figures are based on information for two municipalities, Berlin and Rome, respectively. These do not necessarily represent the average situation in the country, due to heterogeneity in the regulation of fees - for instance, Berlin is among the German *Länder* offering ECEC free of charge to all children. Equally, the previous section has shown that Spanish regions are increasingly adopting demand-side funding tools. Yet these are not considered by OECD estimates (e.g. in Table 5.1) partly because of their recent adoption, starting in 2021.

[7] OECD calculates the out-of-pocket ECEC costs and net ECEC costs for households with two young children (aged 2 and 3) by two ideal-types of households: a dual-earner couple, with gross earnings for the first earner in the family set equal to 100% of average earnings, and gross earnings for the second earner set equal to 67% of average earnings; both partners are assumed to be working full-time; a single-earner single-parent family, with gross earnings for the single-parent set equal to 67% of average earnings; the single parent is assumed to be working full-time. Net childcare costs are calculated as the difference in 'family net income' between a family that uses centre-based childcare services and an otherwise identical family that does not.

Table 5.1 OECD estimates: out-of-pocket ECEC costs and net ECEC costs for two children (aged 2 and 3) by type of household, as a % of average earnings (2021)

Country	Household type	ECEC fee	ECEC subsidies/Tax expenditures	Net cost	Net cost, % of family net income
France	Single parent	23.0	-19.0	4.0	5.0
	Two-earner couple	23.0	-9.0	14.0	10.0
Germany (Berlin)	Single parent	1.0	0.0	1.0	1.0
	Two-earner couple	1.0	0.0	1.0	1.0
Spain	Single parent	9.0	0.0	9.0	13.0
	Two-earner couple	9.0	0.0	9.0	6.0
England	Single parent	49.0	-39.0	11.0	14.0
	Two-earner couple	49.0	-20.0	29.0	22.0
Italy (Rome)	Single parent	37.0	-37.0	0.0	0.0
	Two-earner couple	37.0	-37.0	0.0	0.0

Note: Single parent with full-time earnings at 67% of earnings; Two-earner couple with full-time earnings at 100+67% of earnings
Source: OECD online Family Database (https://www.oecd.org/en/data/datasets/oecd-family-database.html)

Eurydice's 2025 estimates provide other insights. They consider the average monthly fees across regions within each country and by child age in terms of purchasing power parity (PPP) euros. For children above the age of 3 (from when they enter preschool), all countries, except for Germany, offer free ECEC. Early years childcare fees appear to be higher in France than in Germany and Spain. At the same time, as the note in the Table 5.2 reports, fees are highly differentiated according to income and family structure. However, Eurydice's estimates too present limitations. First, there are no data available for Italy and the UK. Second, the information refers to households' out-of-pocket ECEC costs and not their net childcare costs.

Table 5.2 Eurydice estimates: average monthly fees (PPP) for ECEC services for one child depending on the child's age

	France	Germany	UK	Spain	Italy
Children under 3	250-400	100-249	n.a.	100-249	n.a.
Children 3-5 years	No fee	<100	n.a.	No fee	No fee

Notes:
Germany: The figures refer to an 'expanded half-day place' (26–35 hours per week) in centre-based ECEC, and the range in fees refer to those Regions that prescribe fees.
France: There is considerable variation in fees according to income and family structure: €40 for a single parent with resources of half the minimum wage in public centre-based crèches and €460 for a couple with resources five times the minimum wage (up to €710 in microcrèches).
Source: Eurydice (2025) for France, Germany, and Spain

Our estimates provide a more up-to-date picture. They confirm that, in Germany, households pay a comparatively limited amount of net ECEC costs: fees are not high by international comparison, and public funding covers approximately 80% of the cost, for both children under 3 and children over 3, with parents contributing a further 15%, and remaining costs covered by providers themselves. As stated above, in some *Länder*, services are totally free. In 2022, the median ECEC monthly expenses

for a child under the age of 3 was €200. As previously underlined, two thirds of these ECEC fees are tax deductible up to €4,000 per year for each child and the federal law requires to waive fees when families are in receipt of means-tested benefits, including child allowance, housing benefit, unemployment benefit or other social assistance benefits. Moreover, in the last decade, fees have been progressively abolished, albeit not uniformly, across Germany.

At the same time, fees tend to vary greatly. The two case studies, the cities of Dresden and Dortmund, analysed by Gambaro (2025) in her contribution illustrate the variability and the discretional power that local policy makers have in setting fees. In Dresden, the age of the child, the number of children attending from the same family, the number of ECEC hours, and partnership status were used as criteria to define fee amounts: fees are not designed to accommodate differences in disposable income, other than by offering a discount to lone-parents and to guarantee free provision to those receiving means-tested benefits. In Dortmund, fees depend on presence of siblings, age of child, income and number of hours in ECEC. More generally, fees are structured in a way that creates several spikes by gross household income, possibly discouraging enrolment among families with low- and medium incomes.

In Spain, households using 0–2 stage ECEC services spend on average approximately €1,400 per year on fees. However, tax expenditures, provided by both the state and ACs and which have increased over the last decade, play an important role in reducing the cost burden. Compared to the past, in many municipalities, a household with an average income can access ECEC incurring in very little or no cost after accounting for tax expenditures. Compared to OECD and Eurydice estimates for Spain, our analysis suggests net ECEC household costs are lower. However, on one hand, tax exemptions are only for working mothers or if households have some taxes to pay. Therefore, if a municipality or region do not provide free services for a low socio-economic unemployed mother, they might face relatively high costs. On the other hand, municipal strategies often differ, as Palomera and Soler-Buades show for the cases of Madrid and Barcelona. Barcelona introduced a strong progressive sliding-scale system that increases prices for households with very high incomes, and this reduction has also been applied to school meals. Conversely, in Madrid, school meals remain costly, although households can reduce their costs through a tax credit by the central government. Madrid also provides significant subsidies for costly private ECEC centres, strongly prioritising working mothers and large families over income criteria. Overall, while public policy in Barcelona seems to have followed an economically progressive approach, in Madrid, public resources have been directed at working mothers and medium- to high-income households.

In Italy, the average fee amount paid by families for municipal early years daycare centers varies by average regional wealth: it amounts to approximately 2% of annual disposable income in the lowest

income regions (Calabria, Campania, Sicily, Basilicata) and is higher than 5% in wealthier regions, with the exception of Emilia Romagna and Umbria (4%). The fee for a "typical" household (two parents, one child below 3 years of age, a yearly income level of €19,900) for a full-time place is €303/month, prior to regional or national benefits (mainly the '*Bonus Nido'* subsidy). As mentioned earlier, the AUU, together with the *Bonus Nido*, in principle covers a significant share of ECEC fees for a large majority of households using the service. This picture, drawing on the experience of all of Italy's regions, broadly confirms OECD results based exclusively on the experience of Rome.

Beyond national and regional average data, however, cost and financing structures vary significantly among single municipalities. As noted by Neri and Sabatinelli (2025)'s comparison of Rome and Milan early years ECEC cost and financing structures, municipal daycare service fees in both cases are income-related and users with very low income are exempted from payment. However, minimum income threshold (poverty) definitions and approaches to proportionality in setting fees differ. In Rome, the maximum ECEC fee is applied above an annual household income threshold of €50,000, almost twice the top income threshold applied in Milan, of €27,000.

In France, prices for daycare centers are defined uniformly at the national level, except for some private daycare centers that do not follow national guidelines. According to data presented by Carbuccia and Panico (2025), net costs for households in France are relatively contained and closer to the OECD estimate than Eurydice's figures. In the national fee schedule, the upper bound of the hourly price paid by households for daycare is about 0.06% of their total monthly income, with a lower and an upper threshold on total fees. By contrast, other formal childcare solutions, i.e. childminders or at-home childcare are much more expensive, especially for families at the lowest end of the income distribution. However, once income support and service subsidy measures are considered, the gap between the cost of individual childcare and the cost of collective childcare for families narrows for families on higher incomes. For example, for a family earning around two times the minimum wage, the out-of-pocket cost for a full-time daycare slot is typically as low as €132 per month, with diapers and meals included, compared to €286 per month for a childminder. For families earning four or six times the minimum wage, the cost gap narrows, with childminders becoming comparable to daycare. At the same time, even in a country like France where the cost of daycare is relatively homogeneous across-municipalities due to its income-based fee structure, differences in average income levels across municipalities influence how costs are distributed: households in relatively high incomes municipalities (such as Paris) contribute more to out-of-pocket expenses. In contrast, households in economically struggling areas (e.g. Seine-Saint-Denis) bear a lower financial burden individually, as public authorities subsidise a larger portion of childcare costs, leading to significant public expenditure in the poorest municipalities. Additionally, some cities struggling to provide daycare slots have implemented municipal subsidies to align the cost of childminders with

that of public daycare. These subsidies, however, which are left to the initiative of the cities, can be conditional on both parents working, highlighting an additional layer of access criteria in lower-income areas.

England presents the most complex picture across the five countries in terms of fee, cost and financing structures. According to 2019 data in Stewart's (2025) paper, around 40% of three- and four-year-olds and 20% of two-year-olds were paying nothing for their formal childcare thanks to the fact that many families take up their free childcare entitlement and no more. For nearly two-thirds of parents of 3- and 4-year-olds using some formal childcare, childcare expenses were typically less than £20 a week, around 3% of median weekly household earnings for families with children this age. Among families with a 1- or 2-year-old in full-time formal care (40 hours or more per week), half of them spent more than £240 a week on childcare fees for their young child, against median weekly earnings of £900. These rates represented the impact of fee inflation over a decade that has outpaced price and wage inflation: a part-time (25 hours/week) nursery place increased by 59% across the decade and a part-time childminder place by 43%. In comparison, prices were up by 24% and average weekly earnings up by 30%. Fees vary considerably by area, with London and the Southeast recording particularly expensive rates. Finally, it should be recalled that in England demand-side funding tools are means-tested and apply to a limited part of the population. These estimates confirm that England is the place with the highest fee burden on households. Overall, even under the most generous assumptions, childcare fees amount to more than 17% of average household's total pre-tax income. Data from the Childcare and Early Years Survey of Parents report that affordability is "very or fairly good", but 20-25% or parents report difficulty in meeting childcare costs. Since 2017, an entitlement to 30 hours per week (38 weeks per year) of 'free' childcare for three- and four-year-olds with working parents has meant that very high costs primarily fall on parents of under threes, with middle-income families who do not qualify for means-tested demand-side subsidies feeling the greatest burden. Many families manage by limiting their use of formal care and relying on informal options, working reduced hours or even leaving the labour market. Since September 2024 the right to 15 free childcare hours per week has been extended to children with working parents from the age of 9 months, increasing to 30 hours per week from September 2025. This is likely to transform the childcare landscape and reduce costs significantly, though there are concerns about whether supply will be sufficient to meet demand, and about whether government funding to cover the free hours is adequate.

6. ECEC at a crossroads? Policy dilemmas and options

The experiences of the five countries point to common policy issues and dilemmas across ECEC service access, quality and financing. It also provides examples of the initiatives adopted in different contexts and over time to address them. As highlighted at the outset, wider labour market and demographic contexts condition both policy priorities and options. After discussing the implications for ECEC of prospective socioeconomic trends looking forward, this final section identifies the ten main ECEC policy dilemmas that emerge from the comparative analysis and asks whether we observe some degree of convergence or differences across countries by ECEC policy dilemma.

6.1 New pressures and opportunities for ECEC

Demographic, migration and labour market-related changes underway present pressures as well as potential opportunities for ECEC systems, as highlighted in the Introduction. Looking forward, how are current and predicted trends in these broader socioeconomic dimensions expected to shape ECEC policy priorities, dilemmas and options?

Birth rates and population ageing: the steady decline in birth rates in the case study countries over the last decade are expected to lead to additional pressures on public budgets, and, relatedly, greater pressure on increasing the workforce objectives of ECEC policy (more on this below). They are also expected to potentially free up resources within the education system which can be redirected to ECEC years. At the same time, as highlighted in the Spain and France case studies, migration trends are contributing to maintaining child population rates, especially in some geographic areas, and are expected to sustain or increase the demand for ECEC services over time (see Box 2 below for population projections).

Migration: immigration has also contributed to increasingly diverse populations, often as a result of higher birth rates among migrant population groups, and is expected to continue to do so going forward, with implications for ECEC design and implementation arising from differences in norms and preferences about early care and education, additional administrative-related barriers to ECEC access, increasing demand for flexibility and affordability support for those in precarious employment and from disadvantaged backgrounds.

Maternal (and parental) employment: the persistent undervaluation and unequal distribution of childcare responsibilities are linked to low labour market participation rates, interrupted career trajectories and gaps in pay and broader working conditions for parents, particularly mothers, and

carers. Going forward, rising pressures to sustain and expand decent employment will require additional and enhanced measures in support of work-care balance and gender equity to enable parents to combine work and child-rearing responsibilities. In terms of ECEC policy, this includes enabling flexible care services (part time, short term, atypical hours) to match increasingly diverse and precarious job conditions while ensuring continuity and quality of care; extending adequate and well-paid parental leave, promoting incentives for fathers' take-up of care leave and the narrowing of the "ECEC guarantee gap".

Human capital accumulation, better-trained workforce and children's rights: beyond supporting the reconciliation of work-care responsibilities and parental labour market participation, ECEC's role in containing or reducing educational and social inequalities and supporting children's cognitive and non-cognitive outcomes (especially among children from socio-economically disadvantaged backgrounds) is considered key to the future sustainability and productivity of labour markets and society more widely. Looking forward, ensuring that opportunities linked to the great transitions underway - including the demographic, technological and green transitions - are harnessed in support of sustainable and fair work and societies, will require the extension of quality ECEC to all children, notably those at greatest risk of exclusion from such services. As mentioned above, this is reflected in the 2021 EU Strategy on the Rights of the Child and the European Child Guarantee, which requires Member State to *ensure that children in need have free or effective access to ECEC* (EU Council Recommendation 2021/1004).

Box 2: Population dynamics and ECEC policy priorities

Population projections present an indication of future scenarios and related implications for ECEC systems. For 0-2 year-olds, estimates of percentage changes against the 2022 baseline taking migration into account indicate a consistent reduction in this population group in Germany, an overall increase in France, and, in Italy and Spain, following a decline, a levelling out and increase (Figure 1). For the older, 3-5 age group, following a marked decline, percentage change trends indicate a gradual reversal in tendencies (Figure 2). While trajectories are significantly affected by migration trends, and by assumptions about such trends underpinning the analysis, and this needs to be borne in mind, such indicative information underscores two considerations that emerge from the present study: a) the challenges and opportunities linked to the potential freeing up and redirection of resources (including human resources and infrastructure) associated with a contraction in demand arising from demographic dynamics, where these occur, and b) the priority of tackling barriers to ECEC access, especially among children and families facing the greatest barriers and at highest risk of exclusion, such as children with a migrant background.

Figure 1: Projected population change for 0-2 year-olds, by country, 2022 baseline

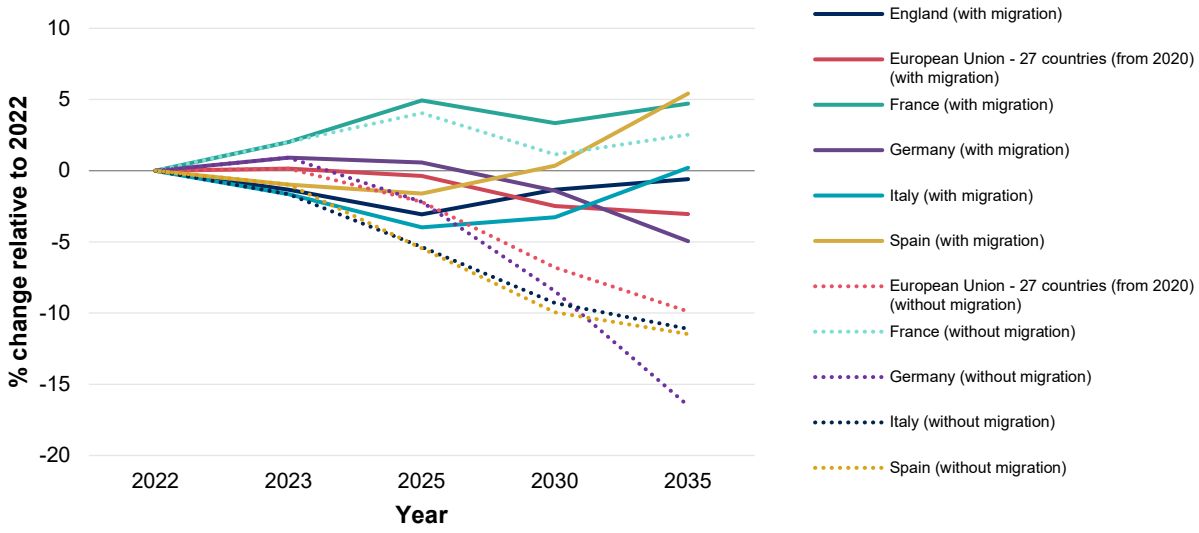
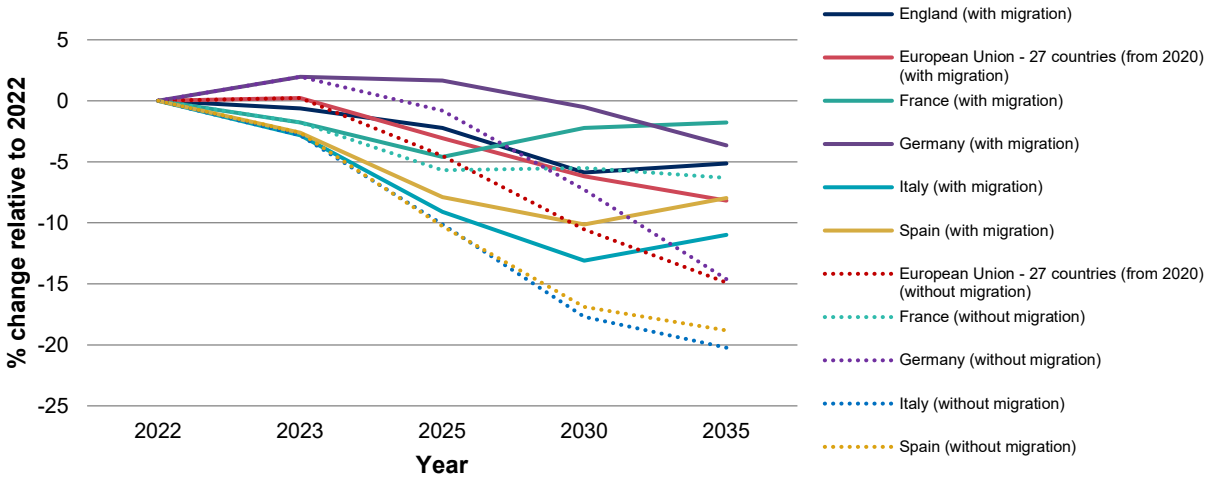


Figure 2: Projected population change for 3-5 year-olds, by country, 2022 baseline



Source: Fondazione Agnelli analysis of EUROSTAT-Europop data and ONS data for the UK
Note: demographic projections published by Eurostat (EUROPOP project) are not forecasts in the strict sense, but conditional scenarios that illustrate how the population might evolve in terms of size and age-sex structure, under a set of assumptions regarding fertility, mortality, and migration. These exercises are intended to explore the long-term implications for the labour market, public spending, and education and pension policies. Net migration levels are assumed to be consistent with historical trends (EUROSTAT, 2023).

6.2 ECEC policy dilemmas, options and cross-country trends

ECEC policy dilemmas and options

We identify ten main policy dilemmas countries face in expanding ECEC service provision (see Table 6.1). While these are presented and discussed as dilemmas, it is evident that they need not be experienced as such and, in practice, policymakers may pursue multiple objectives and adopt different approaches contemporaneously. At the same time, some of the constraints within which ECEC operates mean that dilemmas do arise and priorities need to be set. This is the case, for example, of the ECEC labour shortages experienced by the countries reviewed here - linked in turn to ECEC sector financing and staff working conditions and training – and the dilemma that emerges in the pursuit of ECEC policy expansion and quality improvements in such contexts.

Table 6.1 Key policy issues and "dilemmas" in ECEC service provision

ECEC policy issue	*Dilemmas*
What is the main policy goal?	Child Right to Care and Education vs Work-Care Reconciliation
What policy priority in expanding provision?	Quantity vs Quality
ECEC attendance starting age?	Below One Year of Age vs Above One Year
How to tackle inequalities in access?	Targeted vs Universalist approaches to access
What is ECEC service quality?	Regulating Structural vs Procedural Quality
Which pedagogical and curricular approach?	School readiness vs Play and Socialisation
How to improve the quality of ECEC services?	Raising Qualifications vs Mitigating Staff Shortages
What monitoring of ECEC services?	Monitoring Inputs vs Outcomes Monitoring and Evaluation
Where to direct public ECEC funds?	Funding Demand vs Funding Supply of ECEC
Which modality to expand provision?	Public vs Private provision

Source: Fondazione Agnelli country studies (2026)

An initial dilemma concerns the main goal of ECEC public provision: ***Work-Care Reconciliation Goal versus Child Right to Care and Education/Social Equity Goal***. In tackling ECEC access and coverage concerns, a key distinction concerns whether priority is given to extending coverage to working parents, and working mothers in particular, thus prioritising work-life reconciliation and labour market participation objectives, versus extension to low-income or otherwise disadvantaged households, thus prioritising equity and social inclusion objectives. The requirement to prioritise access for working parents when ECEC places are scarce creates a dilemma because it inherently disadvantages low-income families who may have more precarious or unstable employment or be

single income households than middle-upper income ones, exacerbating existing socio-economic status disparities in ECEC access.

A second dilemma concerns the ***Quantity - Quality Trade-off***: how to meet the pressure to expand the number of ECEC places (quantity) rapidly to achieve policy goals, such as the Barcelona target or increased labour market participation, without fundamentally sacrificing the quality of services? For services facing financial and staff shortages (all five countries in the present study), expansion risks forcing ECEC centres to hire less experienced staff or to increase staff-to-child ratios beyond recommended levels, threatening both structural and procedural quality.

The third dilemma arises from a combination of differences in perceptions about relative benefits for children of alternative ECEC arrangements and, relatedly, of broad policy goals: ***ECEC as Policy for Children Aged at Least One Year versus as Policy for Children below One Year of Age*****?** The interplay and integration between, on the one hand, work leave and household income support schemes, and, on the other, ECEC service provision can follow two approaches. In the first case, ECEC is designed around children from the age of 1 year upwards; for the first months of their life, informal care provision through parents is supported through employment leave schemes and income-replacement programmes, in some cases reflecting a preference for the benefits of parental care for children in the first year of life. This option enables the channeling of public funding to the increase of service coverage rates for 1-2 year-old children; the per-child cost of provision for toddlers below 1 year of age is much higher than for those who are older. The second approach generally reflects a priority for guaranteeing children's right to care and education services from birth or first months of life and / or a priority concern for parents' return to the labour market as soon as possible after a child's birth.

The fourth dilemma concerns the policy approach to addressing the so-called "Matthew Effect", socio-economic background and ethnic disparities in the access to formal childcare: through a ***Targeted or a Universalist Strategy?*** Structural gaps in ECEC access related to household socio-economic status and immigrant background or geographic and territorial differences continue to be significant and persistent across countries. A targeted strategy requires that resources and regulation are adopted to specifically reach and support disadvantaged social groups or areas in accessing ECEC, for instance, through means-tested, or otherwise targeted, initiatives to tackle administrative and cost barriers faced by specific population groups. In contrast, a universalist approach aims to increase overall levels of access to services with the idea that all groups will benefit.

The fifth dilemma relates to differences in understandings of what ECEC service quality entails and which quality dimension should be prioritised: ***Regulating Structural versus Procedural Quality*****?** Regulatory and monitoring efforts may focus primarily on structural dimensions of quality, such as child-staff ratios and ECEC staff qualifications - which are comparatively easier to observe and measure - or on ECEC service procedural dimensions, such as educator-child interactions - which are generally less readily observable and measured. As outlined earlier in this paper, research evidence indicates that service quality is essential to securing positive child outcomes.

The sixth dilemma concerns the pedagogical approach adopted and, more specifically whether there is a focus on promoting ***School Readiness versus Child-based Play*** and socialisation. In the first case, policymakers may adopt national curricula for the below 3/pre preschool segment with explicit links and continuity with the preschool and school segments. In the second, the below 3 years segment may adopt pedagogical guidelines outlining pedagogical approaches with limited links or explicitly delinking early years provision to academic preparation and continuity with preschool.

The seventh dilemma is centered around the objective of enhancing service quality through the regulation of professional standards in the context of current ECEC employment conditions and related workforce constraints: ***Raising Qualifications versus Mitigating Staff Shortages***. The policy decision of raising qualification requirements for ECEC staff (e.g., introducing mandatory degrees), to promote professionalism and service quality, encounters existing labour shortages affecting all five countries, risking additional imbalances between labour supply and demand and the exacerbation of ECEC recruitment challenges.

ECEC policy ***Monitoring of Inputs vs Outcomes*** presents another dilemma. In most countries, monitoring has centered on inputs monitoring, for instance in terms of number of places and their cost, provider type, staff qualifications and educator-child interactions. Over the years, in some countries, efforts have been extended to capturing outcomes, such as children's outcomes, through ECEC self-assessment tools made mandatory for schools and teachers. Measures and assessments of children's development outcomes completed by teachers, even if independently from ECEC-specific evaluation efforts, have also been used to assess ECEC service quality.

The ninth dilemma concerns where to channel public funding: ***Supply-led Funding (to ECEC Centres) or Demand-Led Funding (Households)***. Choosing to invest public funding on the supply of ECEC displays some potential advantages, for example in terms of planning and directing resources to areas and services most in need. Supporting the demand of ECEC by households can help tackle household-specific barriers to ECEC access. At the same time, demand-side tools may regressively favour middle- to high-income households, for instance when in the form of tax credits

or expenditures or of direct cash transfers designed as reimbursements to household expenditures on childcare (as is the case of the 'Bonus Asilo Nido' in Italy).

The final dilemma concerns whether ECEC expansion is pursued via ***Public versus Private Service Provision***. Reliance on private or mixed service provision presents the potential benefit of containing costs to the public purse. In so doing, however, the risk is that the financial burden is shifted on to households (through higher fee rates) and on those employed in the sector (through lower wages and working conditions). Indeed, fee rates of privately-provided ECEC services are generally higher than those of publicly-provided services. Moreover, service quality indicators such as those capturing staff employment conditions and remuneration are generally lower for private compared to public providers.

ECEC policy initiatives and reform in practice: similarities and differences across the five countries

As countries face growing calls to expand ECEC coverage and quality to meet related targets, and given the common ECEC policy dilemmas listed above, do we observe similarities and some degree of convergence in policy initiatives and reforms adopted across the case study countries? Are there persistent or new differences in policy approaches and proposed solutions across countries? We identify both similarities and differences in policy trends, reflecting degrees of convergence along key policy issues but also fundamental differences in some of the approaches adopted.

ECEC trends in the five countries demonstrate convergence across eight policy dilemmas (Table 6.2):

- *comparatively high levels of preschool enrolment and an expansion of coverage of the younger segment (0-2 years olds), the latter facing a stark service quality trade-off*: a primary similarity across all five case study countries is having achieved widespread provision of ECEC services for preschool children, and a general *trend toward expansion of services for the younger segment*, facing, however, ongoing and in some contexts increasing challenges in terms of *ensuring service quality*.
- the *prioritisation of working parents* (dual-earner couples and working lone parents) in admission criteria when places are scarce or rationing occurs in four of the five countries (this is not the case in Germany). This rationing tends to disadvantage low-income families who are more likely to face precarious or unstable employment, as stable parental employment status plays a crucial role in determining access.

- the *professionalisation of the below 3 years staff segment*, matched by increasing difficulties in mitigating labour shortages. Initiatives have included establishing minimum training or education requirements - in particular in Spain, France, and Italy, and, in the case of Germany, the extension of requirements in place for staff of 3 years+ ECEC centres downwards as services were expanded to cater for younger children - as part of efforts to enhance quality and promote the recognition of early years providers. This has contributed to labour shortages in the sector. In some contexts, such as England and Spain, to enable ECEC extension, ECEC staff qualification requirements have been waived. The risk is that there is a difference between 'professionalisation on paper/law' and what takes place in day-to-day ECEC centres, where staff professionalisation requirements are not always met.
- *ECEC policy monitoring* efforts have been stepped up across countries, with a continuing focus on ECEC inputs, although some countries, such as England and Italy, include elements of outcome monitoring. In Italy, recently-introduced mandatory self-assessment reports that all public preschools are required to complete (RAV Infanzia) include four modules on children's outcomes (based on teachers' perceptions). In England, child development assessments (Early Years Foundation Stage Profile) carried out by teachers at age 5, have been used to study ECEC quality-child outcome linkages. However, across countries, frameworks linking ECEC monitoring efforts to policy evaluation and reform are weak.
- *efforts by public authorities to reduce households' cost to ECEC participation:* ECEC services generally become free of charge when children transition to the preschool or kindergarten stage (usually at age three). To reduce costs for services for children below 3 years of age, all five countries have increasingly employed demand-side funding tools, either cash transfers to households or tax expenditures. The practice of waiving fees is also increasingly practiced.
- the *increasing role of private providers* in public contracted-out ECEC provision across all countries, with the partial exception of Spain, where private provision represents almost half of total provision, but efforts have been put in place in recent years aiming to curb its further expansion (e.g. by restricting the use of NGEU funds to private providers).
- the adoption of a combination of *universalist measures* and *targeted support to social groups (e.g. migrant, low-income households) or disadvantaged territories/geographic areas at risk of exclusion*: all five countries have introduced programmes in recent years to tackle barriers to ECEC access, including in terms of affordability as outlined above.

Table 6.2 Policy initiatives and reform in practice: similarities and differences across the five countries

ECEC policy dilemmas	*Country trends - convergence or differences?*
Child Right to Care and Education vs Work-Care Reconciliation	*Similarities*: prioritisation of work-care conciliation goals over social equity ones
Quantity vs Quality	*Similarities:* ECEC service expansion achieved over the years (at different rates), in part at the expense of quality
Below One Year of Age vs Above One Year	*Differences*: Variation in childcare continuity (well-paid parental leave-legal entitlement to ECEC), ECEC place guarantee and age at which ECEC services begin
Targeted vs Universalist approaches to access	*Similarities*: a quasi-universalist approach increasingly integrating measures targeted at 'at-risk of social exclusion' social groups
Regulating Structural vs Procedural Quality	*Similarities:* regulation and minimum standard requirements mostly set against structural quality measures, with growing attention to procedural quality
School readiness vs Play and Socialisation	*Differences*: school readiness is ECEC objective in some countries, compared with a focus on child-based play and explicit separation from academic school preparation in others
Raising Qualifications vs Mitigating Staff Shortages	*Similarities*: increased professionalisation of the 0-2 staff segment, with corresponding difficulties in mitigating staff shortages
Monitoring Inputs vs Outcomes Monitoring and Evaluation	*Similarities:* emphasis remains on monitoring of ECEC inputs, rather than outcomes; weak or non-existent link between monitoring outcomes and policy design reform
Funding Demand vs Supply of ECEC	*Similarities*: ECEC participation costs borne directly by households and local authorities; across countries, efforts by public authorities to support household costs by waiving ECEC service fees and/or via income support measures and central government funding in support of local authorities or specific services
Public vs Private provision	*Similarities*: expansion through an increased role of private provision

Source: Fondazione Agnelli country studies (2026)

Differences in ECEC trends among the five countries are also apparent, across two of the ten policy dilemmas identified:

- the ECEC guarantee gap, arising from the degree of continuity and *integration between well-paid parental leave schemes and age of access to ECEC* persists*:* in France, Italy, and Spain, ECEC services are intended for children from the first months after birth; in Germany starting from the age of one year, and around 9 months in England. Relatedly, the continuity and integration between well-paid parental leave and the legal entitlement to ECEC varies markedly: Germany provides well-paid leave for the first year of life, after which the legal entitlement to an ECEC place begins at age one, ensuring continuity from birth. This is not the case in the remaining four countries, which display varying "ECEC guarantee gaps".
- ECEC system configuration varies reflecting *fundamental differences in ECEC guiding principles and objectives*. France maintains a strictly separate system for younger children, under the Ministry of Health, and preschool children, under the Ministry of Education. Conversely, Italy and Spain have adopted legislation enhancing the coordination and elements of integration of services across the 0-preschool age group. In Germany, the prevailing pedagogical approach in ECEC centres has historically emphasised the spontaneous interaction between child and the environment, relying on child-led, play-based activities rather than structured teaching situations. In England, the unifying curriculum framework (Early Years Foundation Stage Curriculum) for 0-5 year-olds includes standards and guidance to ensure children have the knowledge and skills they need to start school including in literacy and maths.

ECEC's rise up the policy agenda across countries is reflected in growing commitments, at national and international level, to promoting ECEC participation and quality, as well as guidance and recommendations on how to achieve them. Against this backdrop, and the wider demographic and labour market context, this paper has identified common dilemmas policymakers working in ECEC encounter, provided examples of the range of policy initiatives adopted and discusses similarities and differences across policy options.

The experience of the five countries reviewed shows the significant strides forward in terms of extending and expanding ECEC, including to younger children, with France leading the group in terms of aggregate population coverage and other countries following suit with some lag. However, progress in terms of overall ECEC provision has been achieved by leaving some key problems unresolved and possibly by exacerbating them. Two, in particular, stand out across the experience reviewed here. Service quality and socio-economic inequalities in access to ECEC services remain major challenges to the development of more robust and inclusive ECEC systems. If these two issues remain unaddressed, the ECEC reform agenda of the past two decades risks remaining incomplete and its transformative potential unfulfilled.

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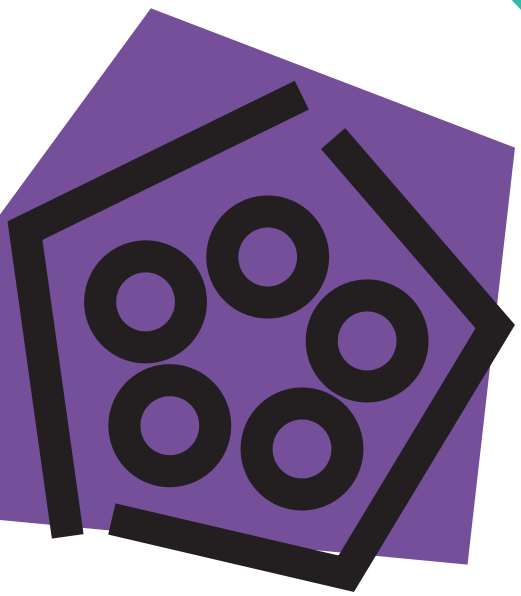

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