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EARLY CHILDHOOD EDUCATION AND CARE IN THE WESTERN BALKANS

Investing for children, families and jobs





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Investing for children, families and jobs

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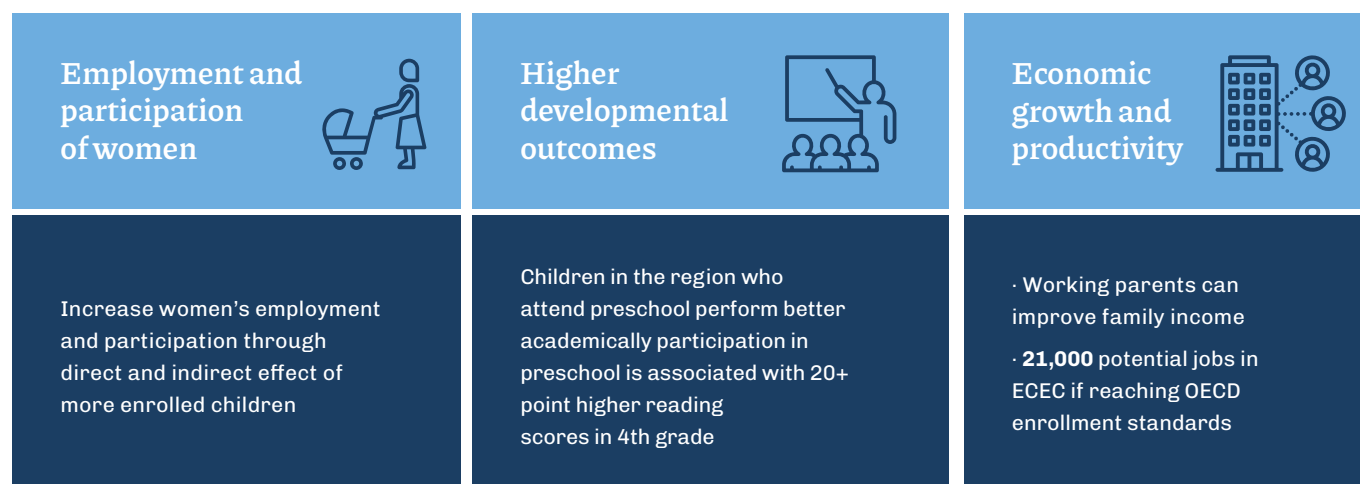
Glossary

BIH	Bosnia and Herzegovina
CPD	Continuing Professional Development
Eurydice	Information network on education in Europe
ECEC	Early Childhood Education and Care
ECTS	European Credit Transfer and Accumulation System
HCI	Human Capital Index
IFC	International Finance Corporation
ISCED	International Standard Classification of Education
MESTI	Kosovan Ministry of Education, Science, Technology and Innovation
NGO	Non-governmental organization
OECD	Organization for Economic Co-operation and Development
RAE	Roma, Ashkali, and Egyptian
RS	Republika Srpska
PISA	Program for International Student Assessment.
PIRLS	Progress in International Reading Literacy Study
WeBa	Western Balkans
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNICEF	United Nations International Children's Emergency Fund

Executive summary

This report takes stock of Early Childhood Education and Care (ECEC) in the six Western Balkan countries, Albania, Bosnia and Herzegovina (BIH), Kosovo, Montenegro, North Macedonia, and Serbia, highlighting the main barriers limiting access, equity, and quality, and outlining practical policy options to build stronger, more inclusive systems. ECEC expansion represents a triple win for the region: it enables greater women's labor-force participation by reducing childcare burdens; strengthens children's early development and long-term learning outcomes; and promotes inclusive economic growth through job creation and improved human capital (Figure 1).

Figure 1. Triple dividend of childcare in the Western Balkans



Source: Authors.

ECEC is one of the most effective policies for increasing mothers' participation in the labor force—an area where the Western Balkans faces significant challenges. 61% of working-age women are not participating in the labor force, compared to 40% of men. Women with young children, especially those under six, are less likely to seek employment, and over 60% of inactive women cite care responsibilities as their main reason for not working. Expanding affordable, reliable ECEC directly reduces these barriers—lowering the cost and time burden of care, shortening career breaks, and enabling mothers to enter or re-enter employment, increase hours, and move into better-quality jobs.

Yet access and affordability remain limited: participation lags well behind EU and OECD averages, especially for children under three and for low income, Roma, and rural households. Public provision has not kept pace with demand; private and community providers face regulatory and financing hurdles; and fees, especially in the private sector, are often prohibitive, with hidden costs further constraining low-income families. As a result, more than half of households with children 0–6 do not use formal childcare, citing costs, distance, norms around mothers' caregiving role, and concerns about quality.

ECEC is also a cornerstone of children's development and human capital formation, shaping cognitive, socio-emotional, and physical development and improving school readiness. Despite this, coverage and quality vary widely across the region. Participation among 3 to primary entry-age children average just over half, but countries differ significantly: Albania and Montenegro approach OECD enrollment levels, and Serbia follows closely, however, Kosovo, North Macedonia, and Bosnia and Herzegovina lag far behind. Enrollment for children under three is uniformly low, with Kosovo among the lowest.

Constraints on enrollment are evident: many municipalities have no formal ECEC services, waiting lists are long, opening hours are limited, and staffing shortages constrain both adequacy and quality. Where public provision is insufficient, informal and unregulated care fills the gap, raising concerns about safety and developmental outcomes. Quality is similarly uneven. While some well resourced-urban centers provide strong learning environments, many settings suffer from large class sizes, limited materials, insufficient support for socio-emotional development, and uneven pedagogical practices. Observations from Kosovo and North Macedonia reveal particularly large quality gaps in rural areas. On the other hand, families cite strong preferences for family care, expectations about mothers' role in childcare, distance, fees, and hidden costs, and doubts about quality as the main reasons for not enrolling their children.

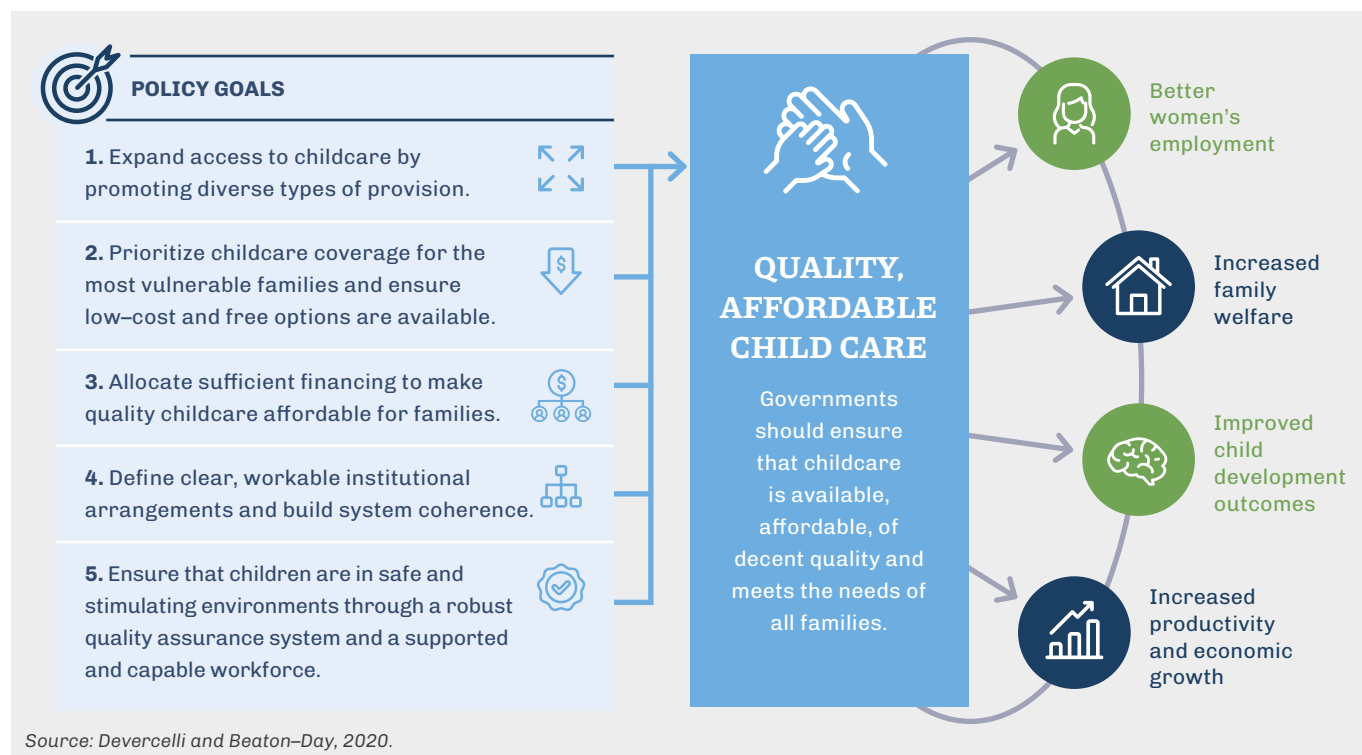
Beyond benefits to women and children, expanding ECEC has the potential to drive long-term economic growth and job creation in the Western Balkans. Direct employment needs are substantial: meeting OECD equivalent enrollment levels would require roughly 24,000 additional teaching and support staff across the region, most of these jobs would go to women. Further job creation would follow as mothers place children in care and enter the labor market.

Furthermore, over the long term, removing barriers to women's economic empowerment, especially childcare, can generate large productivity gains. Closing childcare related constraints alone could boost long run GDP per capita by 45% in Kosovo, 19% in Bosnia and Herzegovina, 14% in North Macedonia, and 7–8% in Montenegro, Serbia, and Albania. These potential gains underscore the urgency of expanding access, raising quality, and ensuring affordability.

Despite some promising reforms for expansion —new facilities, expanded staff training, and stronger outreach— many constraints remain. Public spending on education is low by international standards, and ECEC receives a particularly small share. Most available resources are absorbed by recurrent costs, limiting the ability to expand access, upgrade infrastructure, or improve quality. Financing rules are often fragmented and rigid, particularly in systems where responsibilities are split across ministries or levels of government, making it difficult to match funding to local needs and widening geographic disparities in service provision. In some areas, budget pressures have even led to shortened service hours, enrollment freezes, or increased fees, further burdening families. These financing challenges interact with complex governance structures marked by overlapping mandates, uneven decentralization, and weak coordination, which hinder coherent planning, quality assurance, and accountability. At the same time, the ECEC workforce remains underpaid, undermining recruitment and retention and limiting the sector's capacity to deliver high-quality services at scale.

The region stands at an inflection point. Delivering on the triple dividend will require coordinated reforms that expand places, reduce inequalities, strengthen governance and financing, and professionalize the workforce. This report presents a five-pillar framework to guide policy reform in achieving these goals, drawing on regional data and international best practices, especially from OECD countries. The proposed multi-faceted approach follows clear policy goals, as outlined in Figure 2: expanding access (broadening supply and stimulating demand), prioritizing vulnerable families for public support and spaces, raising and better targeting financing, clarifying institutional responsibilities, and strengthening the workforce and quality-assurance systems. Doing so will foster child development, support family well-being, create jobs, and enable women's employment, yielding both individual and social economic and social returns.

Figure 2. ECEC policy goals: Improving access to affordable and quality childcare



1. Expand access to childcare by promoting diverse types of provision. Given the scale of needs and the urgency of this agenda, expanding the sector would benefit from both increased public and private participation in the provision of services. Encouraging private participation, either independently or in partnership with the public sector, would require tackling barriers related to the overall business environment as well as those specific to the sector around licensing and operations. Particularly in underserved areas, this would also require demand (preferably) or supply-side subsidies to overcome barriers related to scale and additional costs associated, for example, with attracting and retaining qualified staff. Supporting private provision can be done through public-private partnerships, demand-side subsidies, subsidies linked to places for low-income families, and access to professional training opportunities. Expanding the supply of services also needs to pay attention to the varied needs of families. This includes finding innovative ways to provide for vulnerable children and to ensure enough length and flexibility of services to support working parents. Public-private partnerships and voucher schemes aimed at increasing private provision can be prioritized in areas where municipal supply is thin, accompanied by robust quality and equity safeguards.

In many situations, increasing supply alone will not lift enrollment unless norms, information gaps, and trust in the ECEC system are addressed, as recently shown by the Kosovo voucher program. Communication campaigns that involve full families

and sometimes extended families, highlight peer experiences, and explain the developmental and economic benefits of ECEC can shift attitudes. Door-to-door outreach and tailored messaging through schools, social services, and community leaders and organizations can help families navigate enrollment and voice concerns.



2. Prioritize childcare coverage for the most vulnerable families and ensure low-cost and free options are available. Transparent admissions, program designs tailored to their needs, and targeted financial relief, through fee waivers, progressive pricing, reserved places, and outreach via community mediators, can lower barriers and build trust. Access must be matched by quality improvements so that participation translates into real developmental gains, particularly for minority groups and children with disabilities.



3. Allocate sufficient financing to make quality childcare affordable for families. Public investment in ECEC, especially for children under three, falls short of levels associated with broad access and strong outcomes. Larger budgets for early childhood can create more places, enhance quality, and lighten the burden on households. Progressive fee structures and supplemental funding for providers serving high-needs populations will bolster affordability and equity without compromising standards. Limited funds need to be used efficiently, and this requires more effective targeting of public subsidies, continued expenditure reviews, and reviewing funding formulas to tie more closely to the most critical policy goals of the sector.



4. Define clear, workable institutional arrangements and build system coherence. Clear mandates, aligned legal frameworks, and capable coordination units can reduce fragmentation and improve implementation across tiers of government. Regular, transparent quality monitoring, backed by public reporting and structured improvement plans, will reinforce accountability and support continuous progress. Enforceable staffing and child-to-teacher ratios, depending on age, can ensure safe, stimulating environments and consistent educator-child interactions as systems scale.



5. Ensure that children are in safe and stimulating environments through a robust quality assurance system and a supported and capable workforce. Sustaining and improving quality starts with teachers, and demands unified professional standards across age groups, structured career-long development paths and training opportunities, and incentives, financial and non-financial, to attract staff to hard-to-serve areas and keep experienced educators in the profession. Clear progression routes into leadership, specialist, and policy roles, together with competitive salary growth, will help professionalize and stabilize the sector.

1. Introduction

Early Childhood Education and Care (ECEC) refers to any publicly regulated service that provides education and childcare for children from birth to the start of primary education. ECEC, or childcare as often referred to in this report, plays a vital role in shaping children's cognitive, social, and emotional development, improving school readiness, and supporting parental employment —particularly among women (World Bank, 2024a). In the Western Balkans, expanding access to quality ECEC is not only a foundation for children's lifelong learning and well-being but also a key driver of inclusive economic growth and gender equality.

Yet despite its proven benefits, the region continues to face persistent challenges in delivering equitable, affordable, and high-quality ECEC services. Enrollment remains well below European Union (EU) averages, especially for children under the age of three and those from marginalized groups such as low-income households, Roma families, and rural communities. Public provision has struggled to meet rising demand, while private and community-based providers remain underdeveloped due to financing and regulatory barriers.

This report seeks to deepen the understanding of these challenges and their root causes, drawing on available data, existing literature, and local surveys.¹ It reviews the current landscape of ECEC in the Western Balkans, examines the constraints that limit access, equity, and quality, and identifies actionable policy options. By doing so, it aims to inform strategies for strengthening ECEC systems and promoting more inclusive access across the region.

¹ Two firms, Civitta and WeGlobal, were engaged in collecting primary data. For more information on the methodology see Box 1.

Box 1. Methodology for data collection

This study combines analysis of existing quantitative data with new qualitative research, based on extensive desk research and additional data collection through interviews and focus groups involving key stakeholders. This methodological framework allows for incorporating diverse perspectives and assessing areas where hard data is limited or does not exist.

The review involved analyzing legal and policy frameworks, including national education strategies, government regulations, and funding mechanisms. Reports from international organizations such as the World Bank, UNICEF, and EU initiatives were examined to benchmark best practices and identify gaps in the current system. Local sources were reviewed to gain a deeper understanding of the ECEC framework and provision. Furthermore, statistical data on enrollment rates and ECEC funding were reviewed to assess accessibility and service quality.

Primary data collection was carried out in all countries, except in Montenegro where access to stakeholders was difficult, and included conducting in-depth interviews with key stakeholders, such as representatives from central and local government, preschool educators, policymakers, private sector, and NGO representatives involved in early childhood education. Insights were gathered on policy effectiveness, resource allocation, training needs for educators, and challenges in expanding access to quality ECEC services. Additionally, focus group discussions were scheduled to engage small groups of parents and caregivers to discuss experiences and challenges related to ECEC. This work is also complemented by a more in-depth deep dive study on childcare in Kosovo.

This methodological framework aims to provide a comprehensive analysis. While the report focuses on common issues across countries in the region, it highlights distinctive country-specific issues when needed. The study provides an in-depth examination of existing policies, service provision, challenges, and opportunities, forming a foundation for practical recommendations to enhance ECEC services in the Western Balkans.

2. The Importance and Impact of Early Childhood Education and Care

Accessible, high-quality childcare is a strategic investment for the Western Balkans because it represents a triple win: it enables greater women's labor-force participation by easing childcare constraints, strengthens children's early development and long-term learning outcomes, and promotes inclusive economic growth through job creation and improved human capital. These benefits are especially important in a region where female labor-force participation remains low and demographic pressures are rising.

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Women's participation in the labor market in the region, is among the lowest in Europe, with 61% of working-age women out of the labor force compared to 40% of men. The constraint is particularly acute for mothers: women with children under six are significantly more likely to be inactive, and more than 60% of inactive women aged 25–34 cite childcare and household responsibilities as their primary barrier to employment (Fruttero et al, 2026). Affordable, accessible, and high-quality childcare helps women overcome these barriers, allowing them to enter the workforce or transition into more stable and rewarding jobs. Evidence from high income countries shows that investment in early childhood services is strongly associated with increases in maternal employment (Olivetti & Petrongolo, 2017). Cross country analysis from 95 low and middle income economies reinforces this: improving

childcare availability and affordability raised female labor force participation by up to 4 percentage points within five years (Dinarte et al., 2023).² These global results align closely with the patterns seen in the Western Balkans, where the lack of childcare pushes many women toward informal work or self-employment, chosen largely for its flexibility (Alfers, 2016). In Bosnia and Herzegovina, 83% of women report that limited childcare access and the burden of unpaid care work constrain their career advancement (Spahić Šiljak & Đipa, 2024).

Childcare expansion also intersects with the region's demographic trajectory. The Western Balkans faces aging populations, outmigration, shrinking cohorts of young workers, and rising dependency ratios. In this context, policies that help parents balance work and family life play a double role: they raise women's employment and are associated with higher fertility rates, helping soften the impacts of demographic transition (World Bank, 2025c). Childcare, therefore, is not only a labor market intervention but also a demographic policy tool.

ECEC is equally vital for building the region's human capital. The early years are a critical period of brain development, during which children acquire foundational language, cognitive, and socioemotional skills. Evidence shows that proper nutrition, healthcare, early stimulation, and responsive caregiving improve cognitive and socioemotional outcomes (World Bank, 2017). High quality ECEC strengthens school readiness (Heckman & Masterov, 2007; Devercelli & Beaton Day, 2020), improves the likelihood of remaining in school and accessing higher skilled jobs (Shafiq, Devercelli & Valerio, 2018), and boosts early academic performance. In the Western Balkans, children who attend preschool score over 20 points higher in reading by grade four compared to nonattenders—one of the clearest signs that early learning gaps translate into later achievement gaps (Shmis et al., 2024).

Childcare also improves household welfare. When mothers work, family incomes rise, and evidence consistently shows that women's earnings translate into greater investments in children's health, education, and nutrition. Childcare access can even improve school attendance for older siblings, who no longer shoulder care responsibilities for younger children (Devercelli & Beaton Day, 2020).

Finally, expanding childcare services boosts economic growth both directly and indirectly. Meeting OECD level enrollment in the Western Balkans would require around 16,000 new teaching positions and 8,000 administrative and support staff, creating approximately 24,000 new jobs—the majority of which would go to women, significantly raising female employment in countries like Kosovo (+5%) and North Macedonia and Bosnia and Herzegovina (+1.4%). The long-term macroeconomic returns are even more substantial: removing childcare related constraints to women's

2. A large and growing literature also substantiate these findings Heath, 2025; IFC 2017; Hein and Cassirer 2010; Diaz and Rodriguez-Chamussy 2013; Woetzel et al. 2015; UN Women 2015; World Bank 2018; Revenga and Dooley 2020; Evans, Jakiela, and Knauer 2021; Martinez and Perticara 2017; Halim, Perova, and Reynolds 2021; Ajayi, Dao and Koussoubé 2022.

economic empowerment could raise GDP per capita by 45 percent in Kosovo, 19% in Bosnia and Herzegovina, 14% in North Macedonia, and 7–8 % in Montenegro, Serbia, and Albania (Fruttero et al., 2026). These effects reflect not only increased labor supply, but also the productivity gains associated with better educated children entering the workforce.

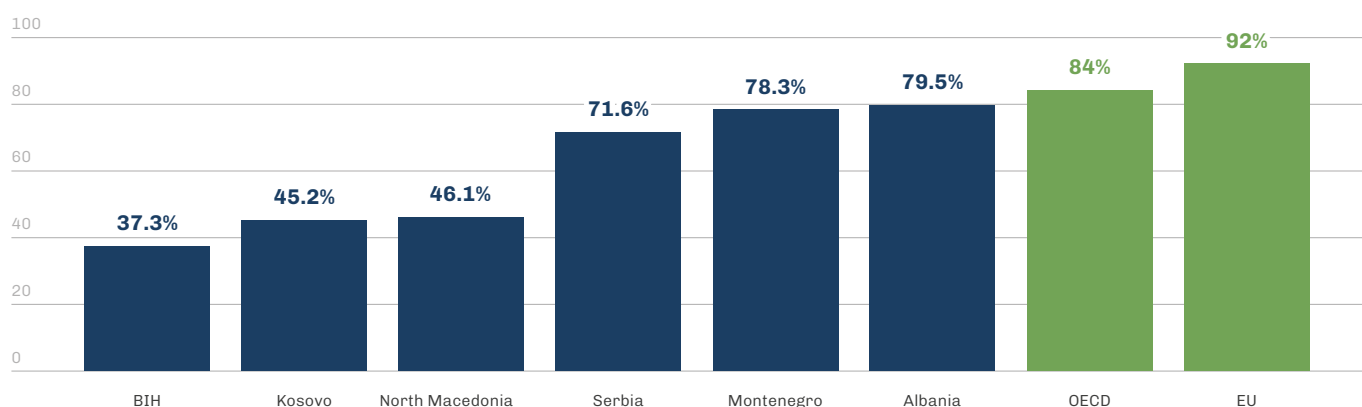
Given these combined benefits —greater participation, stronger child development, higher household welfare, and significant long term economic growth— quality ECEC should be treated as essential economic infrastructure. Returns on investment are substantial: high quality childcare services are estimated to yield 7–13 percent annual economic returns (García et al., 2020), and regional simulations for North Macedonia show that universal high quality ECEC could increase GDP by 5.8 percent, with a multiplier of 1.8 (De Heanu & Mojsoska, 2019). For the Western Balkans, expanding access to quality, affordable childcare is therefore one of the most cost-effective strategies to strengthen human capital and support sustainable, inclusive growth.

3. ECEC services in the Western Balkans

Countries in the Western Balkans have a diverse landscape of ECEC services, reflecting varying levels of enrollment, service provision, and quality across countries. This section provides a situational analysis of the ECEC sector examining aspects such as enrollment rates, types of services offered, costs and fees, quality of provision, workforce, governance structures, and financing mechanisms. By exploring these dimensions, we aim to provide a comprehensive understanding of the current state and challenges of ECEC services in the Western Balkans.

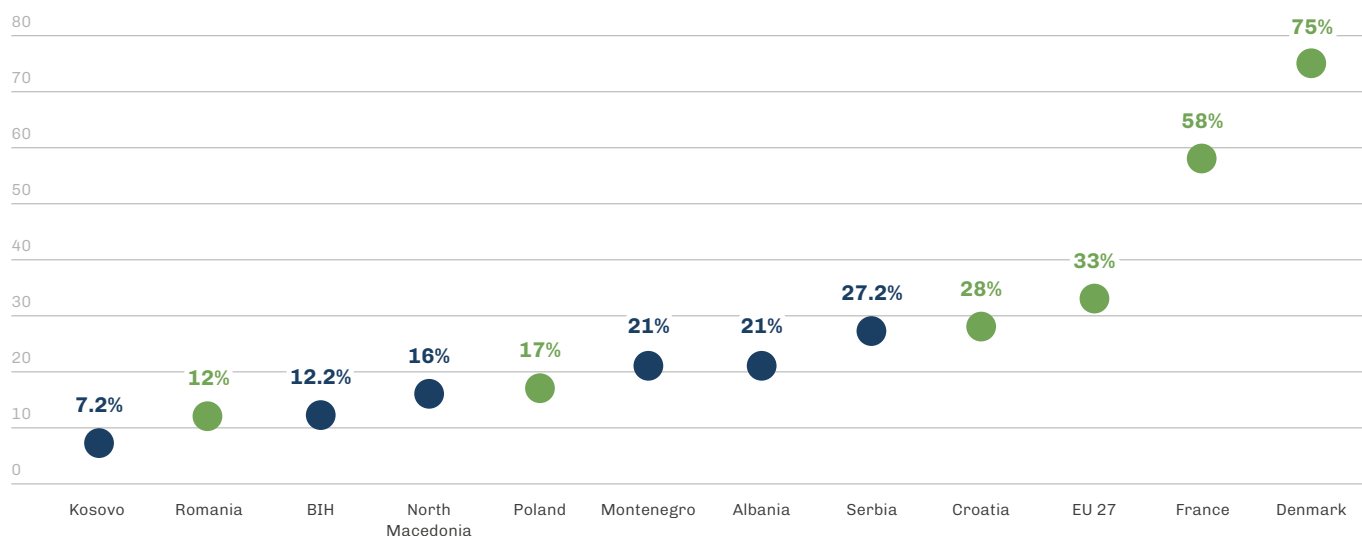
Enrollment and types of services provided

Enrollment in childcare varies significantly across countries in the Western Balkans. For pre-primary education (ages 3 to school age), Albania and Montenegro boast high preschool enrollment rates, approaching the levels seen in OECD countries. Conversely, countries such as Kosovo, North Macedonia, and Bosnia and Herzegovina lag considerably behind, with enrollment figures for this age group less than half of those in their regional counterparts (Figure 3). Only in Kosovo (very recent), the Federation of Bosnia and Herzegovina, and Serbia is the last year of preschool mandatory (Table 1). The regional average stands at approximately 51% (OECD, 2024a). In practice, this means a sizeable numbers of children in the region do not benefit from any formal early childhood learning or care before they enter primary school.

Figure 3. Net enrollment in pre-primary education from age 3 to 6, 2023 or latest

Source: Data for North Macedonia, Montenegro, Serbia, EU is taken from Eurostat and corresponds to 2023; data for Albania is taken from UNICEF (2025) for 2023 and reports gross ratio; data for BIH and Kosovo is calculated by taking the absolute number of children enrolled according to the Agency for Statistics of each country for 2023 and dividing by the total population of children in these groups using UN (2024) data—for Kosovo this is 3–5 years old and for BIH 3–6 years old; Data for the OECD and the regional average is taken from OECD, 2024a.

For children under the age of 3, consistent data is harder to obtain, but it is clear that the enrollment rate across Western Balkan countries is significantly below the OECD average of 32%. This enrollment is particularly low for Kosovo, where only 7% of children are enrolled, followed by Bosnia and Herzegovina (13%) and North Macedonia (16%) (Figure 4). This low enrollment is largely attributed to children in this age group remaining at home with parents during maternity leave or parents perceiving them as too young for kindergarten enrollment (Gomez Tamayo and Shmis, 2026) The EU's Barcelona targets call for at least 45% enrollment of children under age 3 by 2030.

Figure 4. Percentage of children under 3 years old using ECEC services for at least one hour a week

Source: Percentages for Albania, BIH, Kosovo, North Macedonia, Montenegro and Serbia were calculated by taking the absolute number of children enrolled between 0 and 3 according to the Agency for Statistics of each country for 2023 and dividing by the total population of children in these groups using UN (2024) data. For the comparative countries, the data from UNESCO, 2024 was taken.

By gender, there is a balanced participation of children in kindergartens, with institutions reporting approximately 52% male and 48% female students across the region (World Bank, 2023; Institute of Statistics Albania, 2024; Institute of Statistics of North Macedonia, 2024; MESTI, 2024; Ministry of Civil Affairs, 2023).

Most countries offer 2–3 different types of ECEC services, including nurseries or creches for children under 3 years old, kindergarten spaces for those aged 3 to 5, and some form of pre–primary preparatory classes for children aged 5–6. See Table 1 for a breakdown across countries.

Table 1. Types of ECEC services across countries

COUNTRY	CARE TYPES	
 Albania	Nurseries	Provide ECEC services for children aged 0–3 years.
	Kindergartens (kopshte)	Offer ECEC for children aged 3–5 years, operating in age groups of 3–4 year olds, 4–5 year olds, and 5–6 year olds.
	Preparatory Classes	Conducted in basic education schools for five-year-old children, regardless of prior preschool attendance. No compulsory preschool year.
 Bosnia and Herzegovina (BIH)	Nursery	For children from 6 months to 3 years old.
	Kindergarten	For children from 3 up to 6 years old.
	Preschool Preparatory Program	Implemented in the year before starting school, compulsory for children between 5 and 6 years old in the Federation of BIH and the Brčko District; not compulsory in Republika Srpska (RS).
 Kosovo	Center–Based Care Services	For children between nine months and three years old.
	Center–Based Care and Education Services	For children aged 3 to 6 years.
	Pre–Primary Education	For children aged 5 to 6 years (Grade 0), provided at both preschool and primary school institutions. Mandatory under the new ECEC Law.
 Montenegro	Nursery Groups	For children under 3 years. There are legal provisions for this to be home–based, but this type of provision is not yet in place.
	Kindergarten Groups	For children aged 3 years up to the age of 6 when they enter primary school. Preschool education is not mandatory.
 North Macedonia	Preschools	Include nursery groups (jasli) for children under 3 years. No mandatory preschool but one year of kindergarten is tuition–free for 5–year–olds.
	Early Childhood Development Centers	Serve children aged 3 up to 6 years old.
 Serbia	Nursery	For children aged 6 months to 3 years.
	Kindergarten	For children aged 3–5.5 years.
	Preschool Preparatory Program	For children over 5.5 years, mandatory and free of charge (4 hours/ day), delivered in ECEC institutions or primary schools.

Source: Eurydice, 2025 and Gomez Tamayo and Shmis, 2026.

The operating hours of ECEC centers vary significantly across the region, reflecting local needs and regulatory frameworks, as well as the availability and capacity that providers have (Eurydice, 2025; Gomez Tamayo and Shmis, 2026).

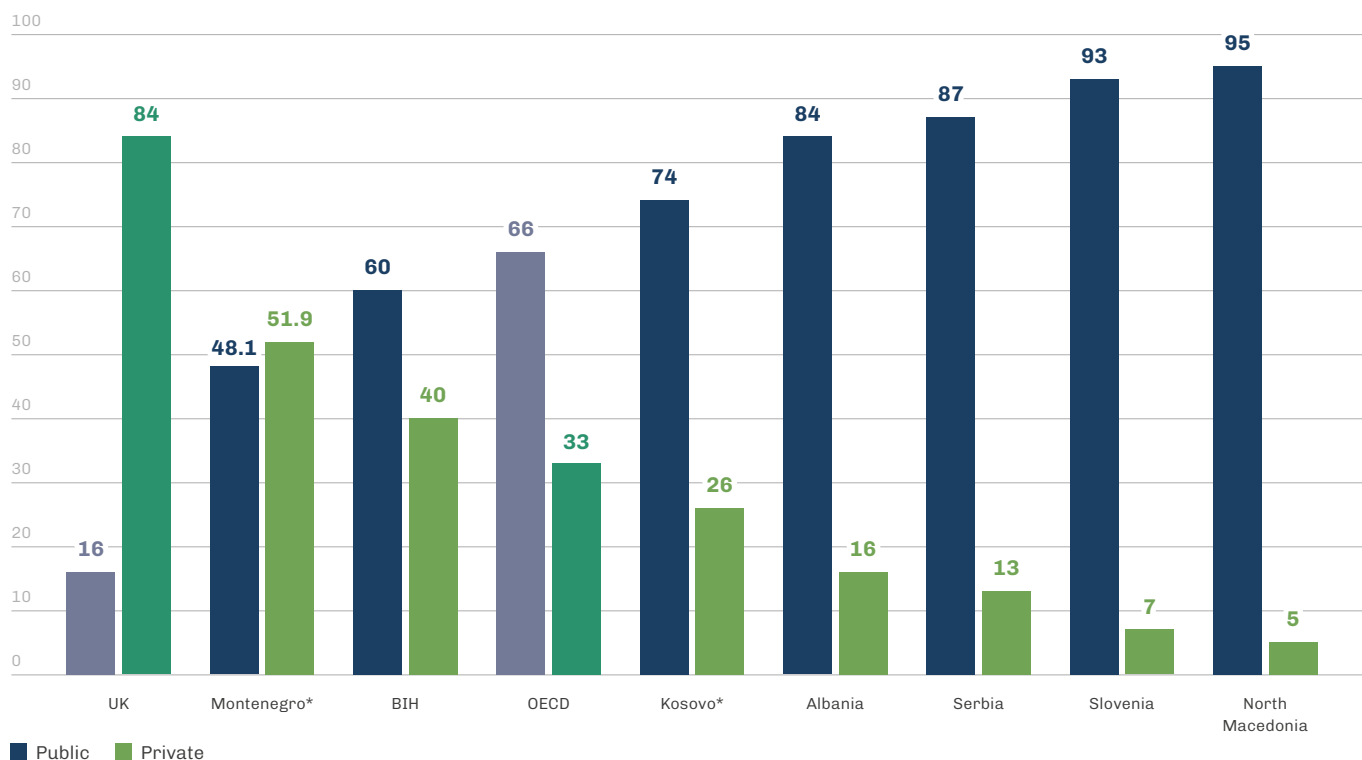
- **In Albania**, ECEC providers operate half-day programs from 8:00 to 12:00 and full-day programs from 8:00 to 16:00.
- **In Bosnia and Herzegovina**, preschools typically operate from 7:00 to 17:00, offering full-day (up to 12 hours) and half-day (up to 6 hours) programs.
- **In Kosovo**, public and private kindergartens typically operate from 07:00 to 17:00, while community-based centers offer services for 2–3 hours per day.
- **In Montenegro**, ECEC programs include full-day (6–9 hours), half-day (4–6 hours), shorter (3 hours), and specialized programs (up to 4 hours).
- **In North Macedonia**, preschool institutions are open five days a week, offering full-day programs (9–11 hours) and half-day programs (4–6 hours), available in both public and private settings.
- **In Serbia**, there are three forms of provision: half-day (up to 6 hours), whole-day (9–12 hours), and multiple-day programs for families with specific needs (24-hour services, including overnight stays for extended care).

Service providers

In the Western Balkans, both non-state and state actors are integral to the provision of ECEC. All six countries now allow private or NGO-run ECEC centers, to varying extents. However, the roles and prevalence of these sectors vary significantly across countries. Montenegro and BIH represent one end of the spectrum with a somewhat even distribution between public and private providers, while most other countries predominantly rely on public provision (Figure 5). For Kosovo, provision for children between 0–5 years old is also evenly distributed across the public and private sectors, though public provision dominates for the pre-primary program. Community-based initiatives and services provided by NGOs, considered here part of the non-state (“private”) sector, are often critical to reaching marginalized communities, particularly in rural and underserved regions. These alternatives have increased capacity, but without public subsidies many remain affordable mainly to middle-class and affluent families.

Public institutions are typically managed by local municipalities and offer subsidized or free services, especially for compulsory education levels. Private institutions complement public services, particularly in urban areas where demand and ability to pay are higher. These providers range from small, family-run centers to larger, formal institutions. Private provision in ECEC has been growing rapidly. In North Macedonia, for example, private kindergartens have increased from 3 private (compared to 54 public) in 2011 to 31 private (and 78 public) in 2022 (World Bank 2023). In addition to licensed operators, many unregistered family-run daycare providers serve young

Figure 5. Share of enrolled pre-school students by type of provider —latest available



*Note: In Kosovo and Montenegro, the private sector includes community-based facilities.

Source: Eurydice, 2025; Institute of Statistics Albania, 2024; Institute of Statistics of North Macedonia, 2024; MESTI, 2024; Institute of Statistics of Serbia, 2024; OECD, 2025; MONSTAT, 2023.

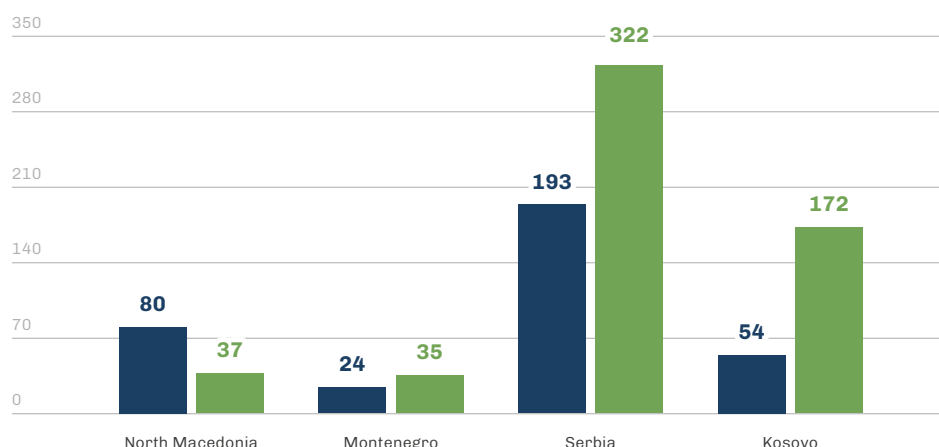
children. These informal services raise concerns about quality and safety due to the lack of oversight and adherence to early childhood development standards.

Kosovo is an example of the efforts countries in the region have been making to diversify provision. The country has implemented various models, including community-based centers, to address access issues and enhance service delivery. These centers typically offer flexible services tailored to community needs, such as part-time care or specialized programs. Similarly, Montenegro provides community-based ECEC programs, characterized by low-cost, flexible learning models. These programs are primarily located in community settings and multipurpose schools, and are largely funded by donors.

Despite the predominance of public provision in ECEC across the Western Balkans, the number of centers does not necessarily reflect this dominance. In countries like Kosovo, private centers tend to be smaller and accommodate fewer children per class compared to their public counterparts. This results in a higher number of private centers, in certain countries, even though the overall capacity may be less than that of public institutions (Figure 6).

Figure 6. Number of centers by type of provider —latest available

■ Public ■ Private



Source: Eurydice, 2025;
Institute of Statistics of North Macedonia, 2024; Gomez Tamayo and Shmis, 2026.

Governance

All Western Balkan countries have established governance systems for ECEC, reflecting growing recognition of its importance for child development, future learning, and labor market outcomes (OECD, 2024a). These systems are underpinned by strategic frameworks, legal regulations, and institutional reforms aimed at expanding access, improving quality, and aligning with international standards. Despite differences in policy maturity and legal enforcement, all six economies are making concerted efforts to strengthen their ECEC sectors (Table 3). For instance, Serbia, Bosnia and Herzegovina, and Kosovo (planned) have introduced legal mandates for pre-primary education, while others, like Albania, Montenegro, and North Macedonia, have developed national strategies or policy goals that prioritize ECEC expansion and quality improvement.

At the same time, the governance of ECEC across the region is highly complex, involving multiple institutions across several administrative levels. Responsibilities are often shared between ministries of education, social policy, health, and local governments, with variations in oversight depending on the type of service (e.g., nurseries vs. kindergartens), age group, or institutional affiliation. This fragmentation complicates policy coordination, quality assurance, and financial management, and often results in unclear guidelines standards (Eurydice, 2025).

In Albania, ECEC governance and financing are decentralized. Municipalities administer nurseries and kindergartens but share responsibilities with two central ministries: the Ministry of Health and Social Protection oversees services for ages 0–3, while the Ministry of Education and Sports governs services for ages 3–6. Although an Early Childhood Development Committee was established to improve coordination, it has limited effectiveness in practice. The country has introduced reforms—including a competency-based preschool curriculum and updated minimum standards for preschool principals— but still lacks a dedicated ECEC law or national strategy.

Table 2. Main policy frameworks to improve and expand access to ECEC

COUNTRY	MAIN POLICY FRAMEWORKS	OBJECTIVE
 Albania	National Strategy on Education 2021–26	Enhance inclusion and participation in preschool and compulsory education, as well as increase access to preschool education and upper secondary education.
	Law on the Pre–University Education System	Increasing the inclusion of children aged 5–6 years in preschool education and raising awareness regarding the importance of participation.
 Bosnia and Herzegovina (BIH)	State–level recommendations for action policies with a roadmap for improving inclusive education	Improve the quality and inclusivity of education at all levels.
 Federation of BIH	Strategic Plan for the Improvement of Early Growth and Development of Children 2020–25	Improve access to early learning opportunities for children.
	Development Strategy 2021–27	Improve the quality of preschool, primary, and secondary education for the needs of development and ensure inclusive education for all.
 Republika Srpska	Strategy for the development of preschool, primary and secondary education 2022–30	Increase coverage of training in preschool education.
 Kosovo	Education Strategy 2022–26	Increasing inclusion and equal access to early childhood education.
	Law on Early Childhood Education	Defines measures to make early childhood education more accessible to marginalized groups (adjusting opening hours, inclusive language, lowering cost barriers, raising awareness)..
	Administrative instruction for the inclusion of children in preschool institutions	Increase engagement of children from the Roma community and other social categories.
 Montenegro	Law on Preschool Education	Establishes the legal framework for preschool education, guarantees free and compulsory preschool in the final pre–primary year, and sets standards for inclusive education.
	Strategy for Early and Preschool Education 2021–25	Increasing coverage of children in preschool education, improving quality of preschool education, and improving chances for early development of children from marginalized groups.
 North Macedonia	National Roma Strategy 2022–30 (and Action Plans for Education)	Reduce the rate of young Roma not in employment, education or training by at least 50%.
	Law on Primary Education	Emphasizes protection against discrimination and the promotion of equality, as well as the inclusive nature of primary education.
	National Strategy on the Rights of Persons with Disabilities 2023–30	Improve educational access and representation of people with disability in education.





COUNTRY	MAIN POLICY FRAMEWORKS	OBJECTIVE
 Serbia	Strategy for Education Development by 2030 (and Action Plan 2023–26)	Specific goals of increasing the accessibility, equity and openness of pre–university education and higher education.
	Rulebook on the Resource Centre	Outlines professional support to children, students and adults who need additional support for inclusive education with the goal of increasing the quality of inclusive education.
	Law on Preschool Education (120/2021)	Regulates the provision of childcare services by both public and private providers and introduced the mandatory year of preschool for all children aged 5.5. to 6.5 years old.

Source: Research conducted for this report and adaptations from OECD, 2024a.

The “Law on Pre–University Education” assigns curricula and teacher qualifications to the ministry, while municipalities handle infrastructure and management (Eurydice, 2025).

In North Macedonia, governance is also split. The Ministry of Education and Science sets teaching standards and develops curricula aligned with Early Learning and Development Standards, while the Ministry of Social Policy, Youth and Demography manages infrastructure, staffing, and budgeting, in cooperation with municipalities. An inter-ministerial body was recently established to strengthen coordination. Municipalities are responsible for managing facilities, enrollment, quality assurance, and local financing. However, despite mandated quality monitoring, implementation remains inconsistent, and fragmentation continues to challenge alignment between curriculum delivery and institutional management (World Bank, 2023; Eurydice, 2025).

In Montenegro, ECEC governance is comparatively centralized. The Ministry of Education, Science and Innovation oversees all ECEC services, with local governments supporting infrastructure. National policies—including the Strategy on Early and Preschool Education (2021–2025)—aim to increase access and improve quality. Montenegro has introduced a unified curriculum for ages 0–6 and expanded inclusive practices through partnerships with resource centers and family-oriented early-intervention pilots. Local governments implement national policy by funding infrastructure, transportation, meal programs, and financial support for low-income families (Eurydice, 2025).

Serbia and Kosovo share structural similarities, though they are at different stages of reform. In Serbia, the Ministry of Education, Science and Technological Development sets national policy, guidelines, and quality standards, while district school authorities oversee implementation. A mandatory one-year Preschool Preparatory Program is in place, and additional actors, including social welfare centers and public-health authorities, support identification of vulnerable children and quality inspections, requiring ongoing intersectoral coordination. Kosovo's governance system is transitioning under a new Law on ECE. Previously, oversight was

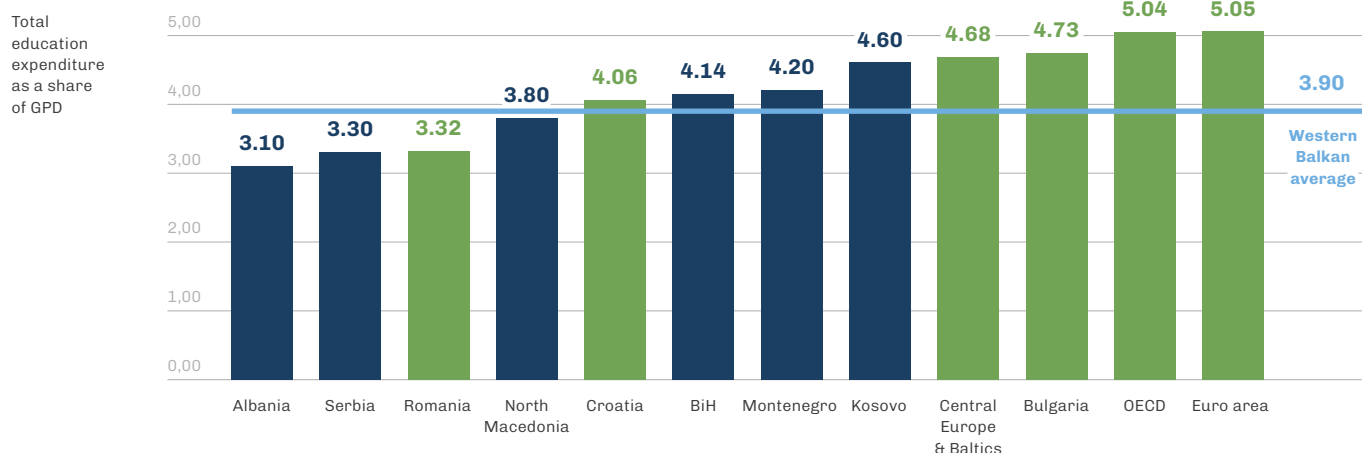
split: the Ministry of Education handled pre-primary (5–6) while the Ministry of Labor and Social Welfare and municipalities managed services for younger ages. The new law consolidates policy leadership under the Ministry of Education, Science, Technology and Innovation (MESTI), which now sets standards and leads implementation. Municipal Education Directorates retain responsibility for day-to-day management and co-financing of public institutions. The law also created a Council for Early Childhood to strengthen cross-sector coordination. Implementation is still underway, and key challenges include integrating previously separate systems and clarifying central–local responsibilities (Gomez Tamayo & Shmis, 2026).

Bosnia and Herzegovina has the most complex governance structure in the region, reflecting its high degree of decentralization. Responsibilities are divided across the Republika Srpska, the Brčko District, and, within the Federation of BiH, ten cantonal ministries—each with its own legislation and standards. A 2007 state-level Framework Law sought to harmonize approaches, but implementation varies widely. The Ministry of Civil Affairs coordinates between administrative levels and leads international engagement, while the Agency for Preschool, Primary and Secondary Education develops common core curricula and standards. However, state-level bodies have limited authority, leading to significant variation in curriculum quality, staff qualifications, and service availability. In the Federation, municipalities manage public provision, further contributing to disparities across cantons (Eurydice, 2025).

Financing of ECEC services

In the Western Balkans region, the average expenditure on education is approximately 3.9% of GDP. This figure is lower than that of neighboring countries and is over 20% less than the average spending in OECD and EU countries, both of which allocate around 5% of GDP to education (OECD, 2024a). Additionally, it falls slightly short of the Education 2030 Framework for Action’s recommendation for Sustainable Development Goal 4, which suggests allocating at least 4–6% of GDP to education (UNESCO, 2016). Behind the regional average spending, there are disparities within the region. Kosovo, Montenegro, and Bosnia and Herzegovina have higher expenditures, exceeding 4%, while North Macedonia is just at the threshold with an expenditure of 3.8%, Albania and Serbia have significantly lower expenditures, with substantial gaps to meet the Sustainable Development Goals targets (Figure 7).

Despite some countries nearing target levels for overall education expenditure, the proportion of the budget allocated to ECEC remains low (Figure 8). Government expenditure on preschool in the region is a small fraction of GDP and of education budgets. Precise data on ECEC-specific spending are not always published, but available indicators and public budget reports suggest that Western Balkan countries typically spend on the order of 0.2–0.4% of GDP on pre-primary education.

Figure 7. Total education expenditure as a share of GDP, 2021 or latest available

Sources: World Development Indicators, 2024; UNESCO, 2024; UNICEF, 2023; Gomez Tamayo and Shmis, 2026; World Bank, 2019.

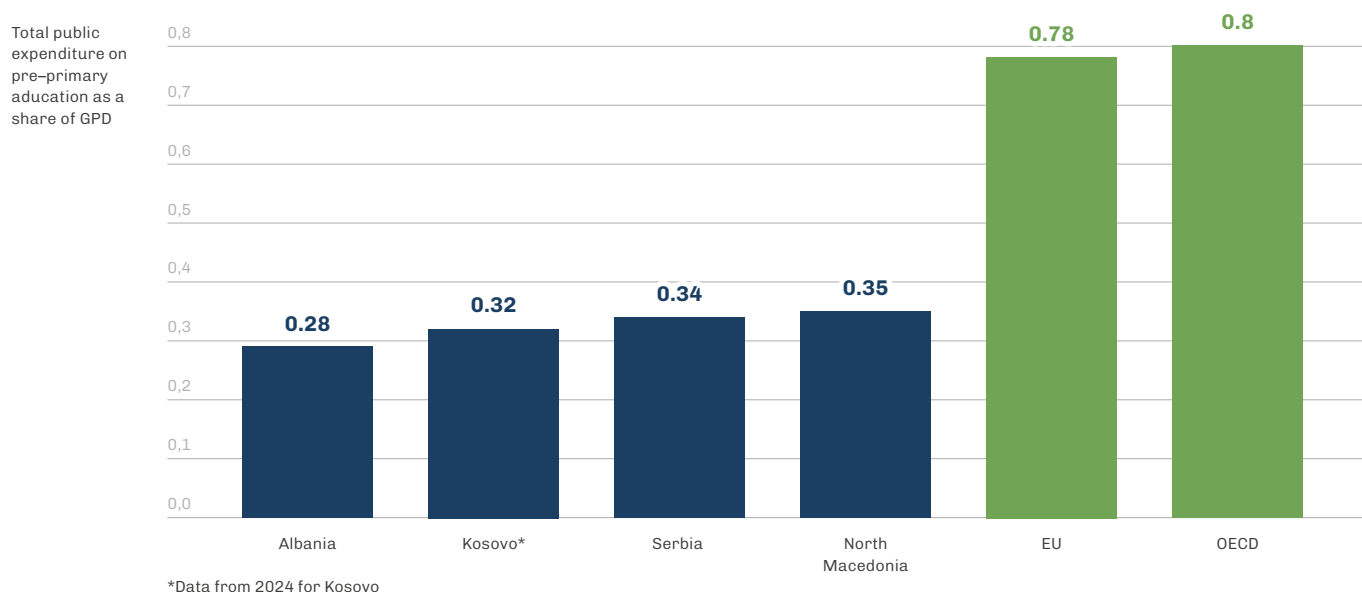
North Macedonia allocates the highest share of GDP to pre-primary education at 0.35%, yet this is still well below the OECD average of 0.8%. All countries allocate less than a tenth of their educational budget to pre-primary education, which is far below the SDG target of a 15 to 20% allocation (UNESCO, 2016). Leading examples include the Nordic countries, France, and the UK, which each invest close to or above 1% of GDP on early childhood services. At the upper end, some countries invest up to 1.8% of GDP in ECEC (including childcare for under-3s), reflecting a robust public commitment. Western Balkan nations are far from these levels.³

A major characteristic of financing in the region is that local governments bear significant responsibility for funding and running ECEC —often without sufficient central support. Most countries apply a certain degree of decentralization, although there is variation across countries.

In Albania, the pre-school system is managed and financed in a decentralized manner, with local municipalities responsible for administration. The Ministry of Health and Social Protection oversees nurseries for ages 0–3, while the Ministry of Education and Sports governs kindergartens for ages 3–6. Municipalities finance non-teaching staff, administrative expenses, and capital investments through public funds, including unconditional grants and their own budgets. State budget funding is partially based on a “per student” formula, with allocations for goods and services determined by joint decisions from the Ministers of Education and Finance. The Ministry of Finance provides funds for staff of nurseries. Public kindergarten teaching staff salaries are centrally funded by the state. Private pre-school institutions

3. In most countries the private sector does not receive any direct funding for their regular operations, although in some cases subsidies may be granted for families to enroll their children in private ECEC institutions (more on this in Section 4).

Figure 8. Total public expenditure on pre-primary education as a share of GDP, 2021 or latest available



Sources: Our World in Data, 2025; UNESCO, 2024; UNICEF, 2023; World Bank, 2023; Ministry of Finance, Labor and Transfers of Kosovo, 2024; OECD, 2023b.

are financed through private funds, with no state budget support (Eurydice, 2025; UNESCO, 2024; World Bank, 2022).

In Serbia and Bosnia and Herzegovina, the financing of ECEC institutions is also almost completely decentralized. In Serbia, the local authorities provide up to 80% of the funding for public institutions. While teacher salaries in pre-schools are co-funded by the central government, municipalities are largely responsible for infrastructure and additional staff, and poorer municipalities struggle to dedicate funds. The national budget is, thus, used primarily to support the compulsory Preschool Preparatory Program. Public institutions conduct the preparatory program, for which funding is allocated from the national budget and transferred to local governments, which then distribute it to the respective preschool institutions. In contrast, private institutions offering preparatory classes are financed by the parents of enrolled children, although recently some local government policies have been introduced to support families with children in the preparatory school program enrolled in private institutions (Eurydice, 2025). Similarly, in BIH preschool funding is primarily sourced from municipal budgets, with the year prior to school enrollment is funded by entity or cantonal ministries of education.

In Kosovo, North Macedonia and Montenegro, the central government is responsible for most of the funding. In Kosovo, funding primarily comes from three sources: the Ministry of Education, Science, Technology, and Innovation, general government grants to municipalities, and specific government grants for ECEC services. The national government is the main financier, with limited financial contributions from municipalities. Local authorities allocate funding based on a pupil-to-capital

ratio. In North Macedonia, almost all funding for ECEC comes from the central government budget, in a form of block grant for each municipality, with these local entities providing minimal additional contributions. The funding formula for ECEC is based on the number of employed staff and the capacity of preschools, but it lacks flexibility to account for regional disparities (World Bank, 2023). In Montenegro, ECEC institutions receive nearly 80% of the total from the State Budget, with the remainder covered by parental fees (UNICEF, 2024).

Costs and fees

The affordability of ECEC varies widely across the Western Balkans, shaped by whether children attend public or private institutions and whether families qualify for government support. In most countries, parents pay a portion of the cost in public centers—as in Montenegro and Serbia—where even modest fees can be prohibitive for low-income households. Private centers are significantly more expensive, with fees in Tirana or Belgrade often reaching €150–€300 per month, representing a substantial share of average household income. Some governments, such as North Macedonia and Montenegro, have recently introduced caps on private preschool fees or partial voucher schemes, though these measures remain limited in scope.

Across the region, ECEC services generally require fees, with only partial exceptions. Serbia's mandatory preschool preparatory program (ages 5.5–6.5) is free, while younger children's attendance still incurs costs. Similarly, in Bosnia and Herzegovina, the preschool program for five-year-olds is free in the Republika Srpska (RS) and free for up to five hours per week in the Federation of Bosnia and Herzegovina (FBiH). These efforts aim to promote access but apply only to specific age groups and programs.

Fee structures in the public sector differ notably across countries, reflecting local governance models and economic conditions (Table 3). In Albania, public fees are capped at 10 percent of the minimum wage, with local exemptions available for Roma families. Bosnia and Herzegovina's public fees range from 10 to 50 percent of the municipality's average net salary, alongside exemption policies for low-income households (UNICEF, 2023). North Macedonia sets fees based on the number of children per family, capped at 10 percent of the average net salary for one child, with public kindergarten fees around €24 per month and private fees between €245 and €395. Montenegro's average cost for full-day programs is about €50 per month, complemented by social-service support for vulnerable groups. Serbia offers subsidized fees ranging from €50 to €80 depending on family income, in addition to free access to the four-hour preparatory program. In Kosovo, public fees range from €40 to €70 per month, with exemptions for vulnerable families.

In addition to standard fees, families across the region often face a range of hidden or supplementary costs that significantly increase the overall expense of ECEC. In Albania, parents are frequently asked to contribute toys or make monetary donations

at the start of the school year to support nursery centers. In North Macedonia, families incur extra costs for extracurricular activities such as dance or foreign language classes, which add roughly €8 per month per activity. In Kosovo, parents similarly report substantial additional expenses, including supplies, transportation fees, and charges for extracurricular programs. Interviews with families indicate that they are often asked to financially support preschools by contributing to materials or activities, making these hidden costs a meaningful barrier to affordability and access.

Table 3. ECEC fees by country

COUNTRY	Public Institution Fees (EUR)	Subsidies and fee deductions in public institutions	Private Institution Fees (EUR)
 Albania	Varies by municipality, but maximum 10% of the minimum wage. Often, half day kindergartens are free of cost. In Tirana, the flat fee is €45 per month.	Exemptions for Roma and Egyptian families; low-income families are eligible for financial assistance.	Depends on the municipality. In Tirana it ranges from €150 to €250.
 Bosnia and Herzegovina (BiH)	€50–82 per month, equivalent to 10 to 50 percent of the average net wage in the respective municipality. Compulsory pre-primary course is free of charge for a half day stay.	Exemptions for low-income families and children in vulnerable situations.	Ranges from approximately €150–250 for a full-day stay, and from approximately €50–100 for a half-day stay.
 Kosovo	€40–70 per month.	Exemptions for children from vulnerable backgrounds.	€150–350 per month. €80 for community-based kindergartens.
 Montenegro	€25 for the half-day program and €50 for the full-day program per month. Single parents benefit from a 50% reduction in these fees.	Support for single parents (50% cost reduction), low-income children and vulnerable children.	€100–300 per month.
 North Macedonia	€24 per month. There is a cap of 10% of the average net salary for one child, increasing for additional children.	Subsidies for low-income families.	€245–395 per month.
 Serbia	€25–80 per month, with the amount depending on the municipality and family income. In Belgrade and Novi Sad, for example, public kindergartens are completely free of charge. Free pre-primary program for 4 hours/day, with an additional monthly fee of €65 for the full day program.	Children without parental care, children with disabilities and those living in financially disadvantaged families are exempt.	€150–400 per month. In certain cases, the municipalities provide a partial refund for this cost, particularly when public providers are overcrowded. ³

Source: Research conducted for this report; Eurydice, 2025; UNICEF, 2023; Interviews Albanian Daily News, 2023.

4. Under such arrangements, a portion of the private fee is paid directly by the municipality, reducing out-of-pocket expenses for eligible families. Attendance in private kindergartens are subsidized with lower amounts: 16,000 RSD for children aged 1 to 3, and 13,000 RSD for children aged 3 to 7, in cities like Belgrade and Novi Sad.

Recognizing the financial burden ECEC fees can impose, all countries in the region have implemented support mechanisms aimed at alleviating costs for socio-economically disadvantaged families and marginalized groups. In Albania, Kosovo, North Macedonia, and Montenegro children from these groups can enroll in public preschools free of charge. In Serbia and RS, reduced costs are available. These measures are crucial in promoting equity and accessibility, ensuring that financial constraints do not hinder educational opportunities for vulnerable populations.

Quality of ECEC provision

QUALITY STANDARDS

Quality is central to the impact of ECEC in the Western Balkans. While all countries have policies and standards in place, implementation is uneven, and quality varies widely across and within countries. This affects both child outcomes and parents' willingness to use childcare.

All six countries have official curricula or educational frameworks for pre-primary education. For example, Serbia has a "Years of Ascent" national preschool curriculum framework emphasizing holistic development. North Macedonia introduced an updated *Early Childhood Development and Learning Standards and curriculum for 0–6 in recent years* (2019), outlining what children should experience and learn. Kosovo's new law mandated development of a comprehensive curriculum covering ages 0–6, and a core curriculum for the preparatory year was already in place since 2011 (revised 2016). Albania has a unified kindergarten curriculum as well. These curricula are generally aligned with modern pedagogical approaches—play-based learning, social-emotional development, early literacy and numeracy, etc.

However, having a curriculum does not guarantee it is well-implemented. Many centers lack the trained staff or materials to deliver the curriculum as intended. In Bosnia and Herzegovina, for instance, curriculum implementation is inconsistent: some richer urban centers follow advanced programs, while elsewhere the curriculum exists only nominally due to shortage of educators and resources. Moreover, age-appropriate practices for the under-3 age group are relatively new in these systems—traditionally, formal "education" was focused on 3–6, with infant-toddler care seen more as custodial. There is a need to strengthen early stimulation and caregiving practices for the 0–3 age range in line with new standards (responsive feeding, play, early communication, etc., often delivered through nurseries or family support programs).

Group sizes and child-to-teacher ratios are critical quality indicators. Legally regulated ratios vary by country and child age. For example, North Macedonia's law indicates a maximum number of students in a class depending on the age of the children (12 for age 2; 18 for 3-year-olds; 25 over 5-year-olds). Serbia similarly caps group sizes to 12 for age 2; 16 for 3-year-olds and 26 for preschoolers. In

Montenegro, the ratios increase progressively from 1:8 for one-year olds to 1:25 for 5–6-year-olds and may vary depending on class composition. In Albania, based on [guidance](#) from the Ministry of Education and Sports, public kindergartens group vary from maximum of 25 children in urban areas to a maximum of 10 children in rural areas. With regard to preparatory classes, in urban areas they contain no fewer than 25 pupils and in rural ones no fewer than 10. Kosovo, after its new law, is also adopting ratio norms aligned with these ranges.

In practice, many centers exceed these ratios because of resource constraints and high demand, although systematic up-to-date data is—as in other areas—not always readily available. Interviews with stakeholders indicate that quality standards, like child-to-teacher ratios are sometimes not effectively enforced. In some Sarajevo Canton preschools, groups of 25 three-year-olds with one teacher were observed, due to teacher shortages. Too large group sizes strain the learning environment and reduce individual attention. On the other hand, some rural or small communities have very low enrollment per group (which can be good for quality but costly). Average pupil-teacher ratios in pre-primary are above the standards set in the law, but these seem broadly aligned with those in OECD countries: Serbia's is about 11:1 (Serbia Statistical Office), whereas Albania's is around 13:1 in public preschools and 11:1 in private ones (Eurydice, 2025). Among OECD countries, the average is 13:1 (OECD 2025).

Quality also depends on having safe, child-friendly facilities and adequate educational materials (toys, books, playgrounds, etc.). Many preschools in the region operate in old buildings that need renovation. Safety standards (for example, emergency exits, childproofing⁵, sanitation) are sometimes not fully met, especially in repurposed venues. Meeting adequate standards requires modernizing premises as countries like North Macedonia, Montenegro, and Serbia have done in recent years. Interviews with diverse stakeholders for this report often highlighted rural facilities often lack heating or insulation, playground equipment that is absent or unsafe, and classrooms that can be sparsely furnished. Teaching and play materials are often also limited by tight budgets. School meals are also an important element of quality in ECE. Meals are provided in many full-day programs, so nutritional quality is part of overall quality.

MONITORING OF ECEC PROVISION

A structured system to monitor quality (inspections, accreditation, feedback loops) is essential for maintaining standards, but many Western Balkan countries have underdeveloped quality assurance for ECEC, while at the same time having overlapped or complex mandates across institutions. Only a few have a dedicated preschool

5. Childproofing refers to the process of ensuring a space is safe for children by preventing their access to or contact with potentially hazardous objects or areas.

inspectorate or similar mechanism. Montenegro has an Education Inspectorate that includes preschool oversight, and North Macedonia recently empowered a State Inspectorate for ECEC to conduct visits and enforce standards, with protocols for reporting and correcting issues. Serbia integrates preschool inspection into its broader education quality assurance system (the school inspectorate and a quality evaluation framework). Kosovo is establishing new mechanisms under the 2023 law, but monitoring is currently weak. BIH lacks a unified system; quality control, if any, is handled at the entity/canton level and is inconsistent (some cantons have preschool pedagogical advisors, others do not, for example) (Eurydice, 2025).

In some countries, there is an absence of formal assessment mechanisms for children's progress in ECEC. In Serbia, for example, there is no formative or summative assessment during ECEC programs. Instead, personal records of progress for each child are maintained and updated within ECEC institutions (Eurydice, 2025). In Kosovo, there are currently no systematic mechanisms for monitoring child growth and development, although educators and teachers in early childhood education centers have reference points for tracking children's progress. The new national quality assurance framework is being designed in Kosovo, but it is at the nascent stage of development. Consequently, data on child development in cognitive, linguistic, and social-emotional dimensions are not readily available (Gomez Tamayo and Shmis, 2026).

In Bosnia and Herzegovina, there is no standardized assessment, but records of children's progress are maintained and evaluated. The assessment is prescribed by laws governing the competent education authorities. Educators record important information during the program's implementation, including the child's participation, potential problems, and suggestions for improvement. At the end of the preschool program, educators provide parents with feedback on the child's achievements. Teachers, along with expert teams, monitor and evaluate each child's creativity and the application of modern educational methods. However, there is no unified set of standards across BIH, with approximately 15 documents regulating preschool education (Eurydice, 2025; UN Women, 2023).

Lastly, North Macedonia and Montenegro follow a more standardized approach to assessing children's development through portfolio systems. In Montenegro, the portfolio provides a compilation of information about a child's development and progression, covering key areas such as sensory and motor skills, cognitive abilities, social and emotional development, and communication. The portfolio is developed and updated over several years while the child is in preschool, involving systematic information collection from parents, preschool teachers, nurses, and professional associates. Tools such as developmental maps, assessment scales, checklists, and questionnaires are used to monitor and evaluate each child's progress (Eurydice, 2025). In North Macedonia, child progress has been monitored through a teacher-compiled child development portfolio, which has been part of the curriculum since 2014. This portfolio assesses children's achievement of outcomes defined in the Early Learning and Development Standards, documenting strengths, abilities, and

interests. It covers physical, cognitive, language, and social development domains for children aged 2–6 years.

MONITORING TEACHING AND LEARNING OUTCOMES

Efforts to assess early learning quality are emerging in the region, although they remain very limited. In North Macedonia, the Measuring Early Learning Quality and Outcomes (MELQO) provided the first nationally comparable data, showing most children perform well, and pointing to a positive correlation between children's development scores and the quality of teaching practices, further underscoring the pivotal contribution of teachers to ECE quality. However, improvements are needed in school readiness skills like literacy and numeracy. Roma children score lower than ethnic Macedonian peers across all domains; other minorities score lower in language and communication domains (World Bank, 2023). Complementary evidence from the TEACH ECEC classroom observation conducted in Kosovo in 2024 points to generally solid teaching practices, particularly in classroom culture, but weaker performance in fostering children's socio-emotional and core skills (Gomez Tamayo and Shmis, 2026). Pooled TEACH ECEC data from Bulgaria, Romania, and Kosovo further suggest that teaching quality varies by geographic location and experience, and that teachers tend to be more effective at creating supportive classroom environments than at developing children's key skills (see Box 2).

Box 2. What do classroom observations tell us about ECEC teaching quality in Eastern Europe?

Recent classroom observations conducted in Bulgaria, Romania, North Macedonia, and Kosovo provide new insights into ECEC teaching quality and early pathways for improvement. Drawing on data collected through the TEACH ECEC tool in Bulgaria, Romania, and Kosovo, and the MELQO instruments in North Macedonia, the analysis captures key dimensions of teaching quality by observing teachers' practices in real classroom settings. The availability of data across four countries enables a regional perspective on ECEC process quality and offers an evidence base to support policymakers in strengthening access to quality ECEC and building effective ECEC teaching workforces.

Initial findings point to several common patterns across countries. Teaching quality tends to be lower in rural than in urban areas, and teachers are generally more effective at creating supportive and respectful classroom environments than at fostering children's critical thinking and socio-emotional skills. These findings are broadly aligned with global TEACH ECE results.

Pooled TEACH ECEC data from Bulgaria, Romania, and Kosovo also suggest that teacher experience matters, with educators with long tenure consistently demonstrating higher levels of teaching quality across all observed domains. These patterns are broadly aligned with global evidence from TEACH ECEC assessments. Evidence from North Macedonia further underscores the importance of teaching quality for child development. MELQO results show a positive correlation between the quality of teaching practices and children's developmental outcomes.

Together, findings from TEACH ECEC and MELQO highlight both strengths to build on, particularly in classroom culture, and priority areas for policy action, including targeted support to improve instructional practices that promote children's core and socio-emotional skills.

Source: Avitabile et al., 2025.

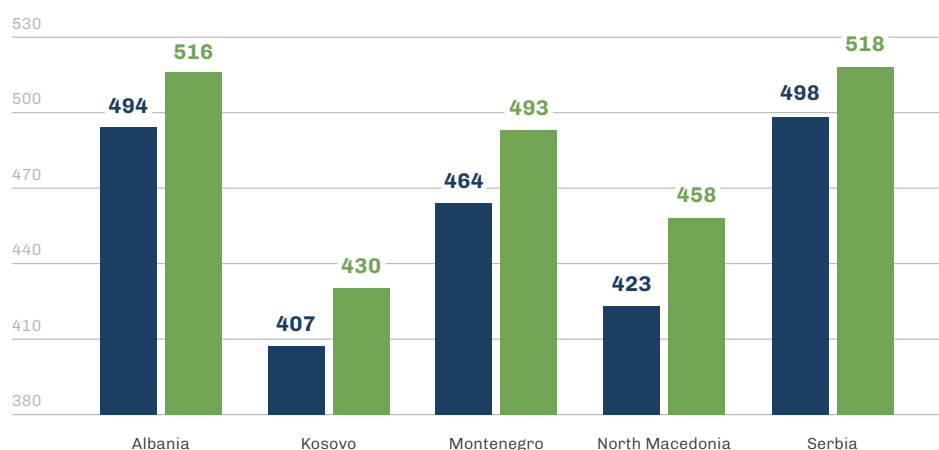
Given the overall lack of comparable assessments, we turn to international assessments to address the current level of quality of ECEC provision in the Western Balkans. For example, according to the new Human Capital Index Plus (HCI+), the human capital performance of Kosovo at 171 points is significantly below the European Union level of 246 points. Improvement of two indicators in Kosovo's education system to the European levels (i) Expected Years of Preschool from 0.1 to 1.0, and (ii) School quality (HLO) from 396 to 504 could bring Kosovo HCI+ score to 204 points—much closer to EU levels (See Annex 1 for HCI+ levels across Western Balkans). Without accelerated improvements in human capital development, convergence of WeBa with EU human capital levels may not be achieved until 2076 (OECD, 2023). These low levels of human capital are linked with currently weak learning outcomes in primary and secondary education, stemming in part from lower average time spent in school, widespread digital distractions, and a limited ability to sustain the gains made during early childhood education (Shmis et al., 2024).

International assessments provide a nuanced view of ECEC's effectiveness in the Western Balkans. Results from the Progress in International Reading Literacy Study (PIRLS) 2021 study, which measures reading literacy among fourth-grade students, show that preschool attendance is associated with positive reading outcomes in the region, but with large differences across countries (Figure 9). Studies in the region show that children who attend preschool perform better academically—for example, participation in preschool is associated with 20+ point higher reading scores in 4th grade (equivalent to roughly one year of learning) across Western Balkan countries. In North Macedonia, the advantage was even larger (35 points, ~1.5 years of learning) (Shmis, 2024). In fact, the benefits of preschool participation on reading scores are comparable to those observed in other PIRLS-participating

countries. Importantly, the data allow for differentiation between daycare and pre-school participation, with findings suggesting that while preschool attendance improves reading comprehension, children who attended only daycare did not experience the same benefits.

Figure 9. Participation in childcare and learning outcomes in Western Balkan countries

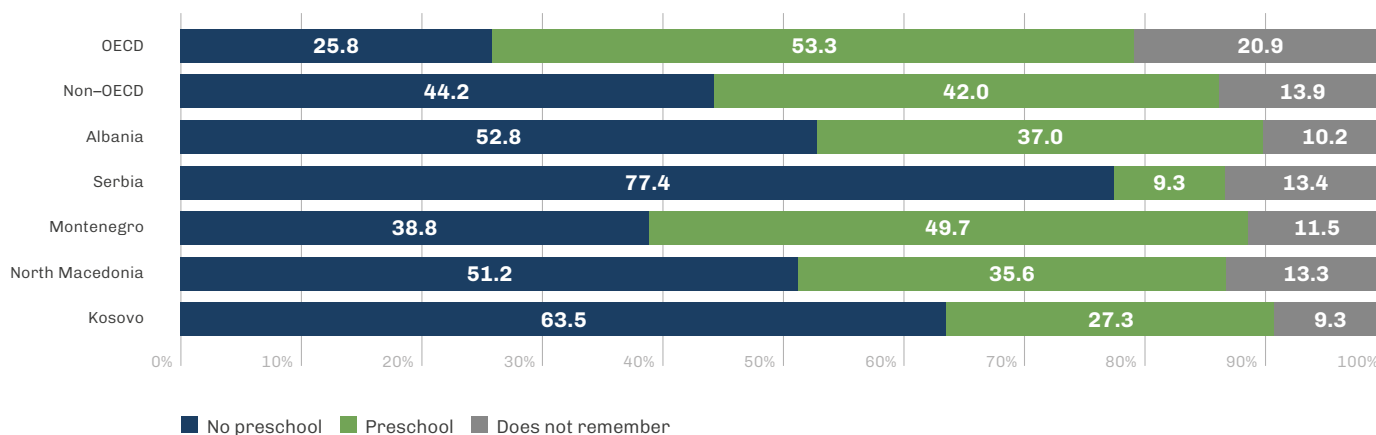
■ PIRLS Mean Scores – Did not participate in any ECE
■ PIRLS Mean Scores – Participated in ECE



Source: taken from Shmis et al. 2024.

Nonetheless, access to ECEC remains limited across the Western Balkans compared to OECD standards. According to PISA 2022 data, only 25 percent of OECD students reported not having attended preschool, whereas this figure was significantly higher in the Western Balkans, reaching 39 percent in Montenegro and as high as 77 percent in Serbia (Figure 10). This suggests that a large proportion of students in the region are entering school without the foundational skills and social experiences that preschool education typically provides.

Figure 10. Preschool Attendance of Students Sampled in PISA 2022.



Source: taken from Shmis et al. 2024.

ECEC workforce

The ECEC teacher workforce across the Western Balkans varies in size, gender composition, and geographic distribution. As of the most recent data, North Macedonia employs approximately 5,365 ECEC teachers (State Statistics Office, 2024), followed by Albania with 4,346 (UNESCO, 2021), Bosnia and Herzegovina with 3,181 (Agency for Statistics of Bosnia and Herzegovina, 2023), and Kosovo with 769 (Gomez Tamayo and Shmis, 2026). The workforce is overwhelmingly female, 92% in North Macedonia, 94% in Bosnia and Herzegovina, and 99% in Kosovo, highlighting both the gendered nature of the profession and potential challenges in workforce diversification. Bosnia and Herzegovina also reports an additional 2,338 staff working in other roles within ECEC, while Kosovo records 97 administrative and 256 support staff. A key regional issue is the concentration of ECEC teachers in urban areas, leaving rural and remote communities underserved (Gomez Tamayo and Shmis, 2026).

WORKFORCE QUALIFICATIONS

Across the Western Balkan countries, there are generally two main types of early childhood educators: those trained to work with very young children (typically aged 0–3 years), and those prepared to work with preschool-aged children (3 years and above). The qualification requirements for these two groups differ significantly, with higher educational standards usually required for those working with older children (Eurydice, 2025).

In North Macedonia, for example, ECEC staff working with children under 3 years old must have completed at least secondary education and hold a valid caregiver license, granted after passing a professional exam administered by the Ministry of Labor and Social Policy. In Albania, nursery educators—who care for children below the age of 3—are not formally designated as teachers and are hired through a municipal process involving paper applications and interviews. Although hiring criteria are set by each municipality, these educators typically hold bachelor's degrees in fields such as social sciences, psychology, nursing, or pedagogy. In Serbia, staff working with children from 6 months to 3 years of age are allowed to hold qualifications below the bachelor's level. In Kosovo, while there are no formal legal requirements for a degree in ECEC for those teaching children under 3, educators in practice often possess a degree in early childhood education.

In contrast, requirements for educators working with children aged 3 and older are more rigorous. In Albania, teachers must complete a first-cycle bachelor's program in pre-school education, pass a state exam, and complete a three-month practicum, and a new framework for evaluating psycho-social workers has been approved, which provides the necessary means for assessing in-service psychologists and social workers within the pre-university education system (UNESCO, 2024; Eurydice, 2025). In North Macedonia, ECEC teachers working with children aged 3 and above are required to have at least an ISCED level 6 qualification (bachelor's

level) in initial teacher training. In Kosovo and Serbia, educators working with children aged 3 to 6 must also possess a bachelor's degree in early childhood education.

Montenegro and Bosnia and Herzegovina are notable exceptions to this split system. In both countries, the qualification requirements for all preschool teachers are uniform regardless of the age group they work with. In Montenegro, a preschool teacher must complete at minimum a three-year higher education program in preschool education, equivalent to a bachelor's degree. In BIH, educators must have at least a first-cycle higher education degree and a professional qualification in a relevant field, alongside passing a professional exam and meeting basic health requirements.

In practice, a review of existing studies and interviews conducted in the region suggests that most urban preschool teachers do hold a post-secondary qualification, but historically many nurseries (for under-3s) and rural childcare centers employed staff with only high-school level training (such as a secondary vocational diploma in childcare). This seems to be slowly changing as older staff retire, and new graduates are hired. However, capacity of training institutions can be a bottleneck: the number of graduates in early childhood education each year is limited. Universities in Belgrade, Skopje, Tirana, etc., have ECE programs, but it is common to hear that there are not enough graduates to fill the gap if a major expansion were to take place. Moreover, there is also anecdotal evidence that private childcare centers sometimes employ staff without the mandated degrees, due to lack of enforcement or shortage of applicants—a risk to quality.

CONTINUOUS PROFESSIONAL DEVELOPMENT

Across the region, systems for advancement and continuing professional development (CPD) for ECEC staff are emerging, though their structure, implementation, and overall impact remain uneven. Many teachers have not received in-service training in modern ECE techniques or inclusive education, as evidenced by the emphasis in recent projects in these areas.

The lack of training is probably a reflection of financial constraints as well as lack of incentives to invest in upskilling. In Montenegro and Serbia, structured career ladders link advancement directly to CPD participation and performance. In Montenegro, the CPD model is based on institutional needs assessments and individualized development plans, with training funded by the government. Teachers can progress through a formal ranking system—from teacher to mentor, adviser, senior adviser, and researcher—encouraging lifelong learning and practical application of new knowledge (General Law on Education, Montenegro). In Serbia, all ECEC and school staff must complete at least 44 hours of CPD annually, including participation in at least one accredited training and one professional event. These are required for promotion along a career pathway that includes various pedagogical adviser levels (Bylaw on CPD, Serbia). In Bosnia and Herzegovina (BIH), regular participation in CPD is also necessary for career progression, including promotion to mentor or advisory roles. However, financing and access to training vary significantly by canton or entity, reflecting

broader administrative decentralization. Overall, a lack of data on CPD makes it difficult to assess whether the links to career advancement exist in practice or not.

In contrast, while CPD frameworks exist in other Western Balkan countries, their ties to career advancement are often weak or undefined, even on paper. In North Macedonia, CPD is mandatory and linked to license renewal every five years. The CPD structure is somewhat developed, offering both generic (e.g., administrative, communication) and specialized (e.g., early childhood development, child protection) training. Training courses are classified into basic, advanced, and trainer-level formats, yet the link to promotion remains limited (State Statistics Office, 2024). In Albania, structured professional development is scarce. Upskilling often occurs informally, such as peer coaching by experienced educators. Formal CPD is rarely linked to career progression, and specialized training, especially for working with children with disabilities, is notably lacking. In Kosovo, training systems are weakly institutionalized and often unavailable for private providers. While public educators do participate in training sessions, including those on methodology and curriculum, there is no systematic needs assessment to guide content or delivery. Instead, CPD offerings are based on available funding and pre-existing training modules, rather than strategic planning or educator demand.

Typically, high-performing systems ensure ongoing mentoring and education for ECE staff (OECD 2025b). The Western Balkans are at an early stage of building such support systems.

SALARIES AND WORKING CONDITIONS

Salary levels for ECEC staff in the Western Balkans are generally modest and often lower than those in other professional sectors (OECD, 2024a). Comparable up-to-date data does not exist, but as of 2021 overall (starting) teacher salaries for all Western Balkan countries were below levels in the rest of Europe in PPP terms. Starting salaries for teachers were just 1.5 times minimum wage levels in Albania, North Macedonia, and Serbia (Eurydice 2022). In Albania, preschool teachers' statutory salaries are similar to those of clerical staff and significantly lower than other professionals, with salaries after 15 years of experience reaching only about 1.0 times GDP per capita, compared to 1.3 times GDP per capita for upper secondary teachers (UNESCO, 2024). In Kosovo, the salary for ECEC teachers is about 8% lower than that of primary teachers, despite having equivalent background requirements (Gomez Tamayo and Shmis, 2026). In North Macedonia, salaries are determined using a point-based system, where teachers with a bachelor's degree begin at 255 points with a starting salary of about €600 (2021), with bonuses and incremental increases based on experience and annual performance evaluations. Core care staff start with fewer points and thus receive lower wages, with the starting salary being equivalent at around €450 in 2021 (Eurydice, 2025). In Serbia, average ECEC teacher salaries are roughly 69% of those earned by other tertiary-educated workers and, despite recent increases (World Bank, 2022).

The child-to-teacher ratio in preschool institutions is diverse across countries, with regulations often setting maximum limits that are not strictly adhered to, especially in urban areas with high demand. Kosovo allows for some flexibility in group sizes, with adjustments made for children with Kosovo follows MESTI guidelines, with ratios ranging from 5 to 12 children per teacher, depending on age, and classroom sizes defined by square meters per child. In Bosnia and Herzegovina, the regulations governing child-to-teacher ratios in preschool education are defined by laws on preschool education, which set specific limits for different age groups. For nursery groups, the maximum number of children per class ranges from 6 to 15, while kindergarten groups have higher limits, with up to 25 children for ages 5 to 6 years. The ratio of staff to children varies depending on the type of group, with typically two teachers per group, unless it is a full-time or mixed group, in which case two teachers or a teacher and a professional associate are required. In North Macedonia, the Child Protection Law does not define any child-teacher ratios, but it does define the maximum number of children per class, with these ranging from 8 children for those under 12 months to 25 children for those over 5 years. Montenegro has similar regulations, with classroom ratios increasing as children age, and special provisions for mixed groups and children with disabilities (Eurydice, 2025; Gomez Tamayo and Shmis, 2026).

4. Main Challenges to ECEC provision

Recognizing the high stakes involved in investing in ECEC, governments in the Western Balkans have begun to put childcare more at the center of their policy agenda. Many have adopted strategies or laws on early childhood education in recent years, often as part of broader social or educational reforms (e.g., a new Early Childhood Education Law in Kosovo in 2023, a Social Protection Law in North Macedonia in 2019 that prioritized expansion of ECEC services, etc.). However, much work remains to build comprehensive childcare systems. The region still trails well behind European standards on most indicators of access, quality and public investment in early childhood services.

ECEC systems in the Western Balkans face persistent common challenges—limited access, equity, and quality. Coverage remains low compared to EU benchmarks, particularly among children under three and those from disadvantaged backgrounds such as low-income, Roma, and rural communities. Public provision alone has struggled to keep pace with rising demand, while private and community-based providers remain underdeveloped due to financing and regulatory constraints. In parallel, lack of an adequate workforce often constrains services and quality; wages are relatively low, and the workforce benefits from limited in-service training, and weak incentives. Finally, financing mechanisms are often fragmented, inequitable, and insufficient to support the expansion of inclusive and high-quality services. In this section, we examine these constraints in greater detail to better understand the root causes of the region's ECEC gaps and identify strategic entry points for investment and reform.

Insufficient use of childcare services outside the home

As has been presented throughout this report, ECEC enrollment in the Western Balkans is low, with challenges for expansion stemming from a combination of supply- and demand-side limitations. On the demand side, low parental uptake presents constraints to the growth and improvement of the childcare sector. This limited demand is driven by factors such as financial barriers, limited awareness of the long-term benefits of ECEC, and prevailing cultural norms regarding the care of young children. On the supply side, there is an insufficient availability of high-quality ECEC services. This shortage also means limited options available to families, and undermines parents' ability to access reliable and developmentally appropriate care and education for their young children. Together, these factors inhibit the development of a dynamic and responsive childcare market that meets the needs of families and supports early learning outcomes.

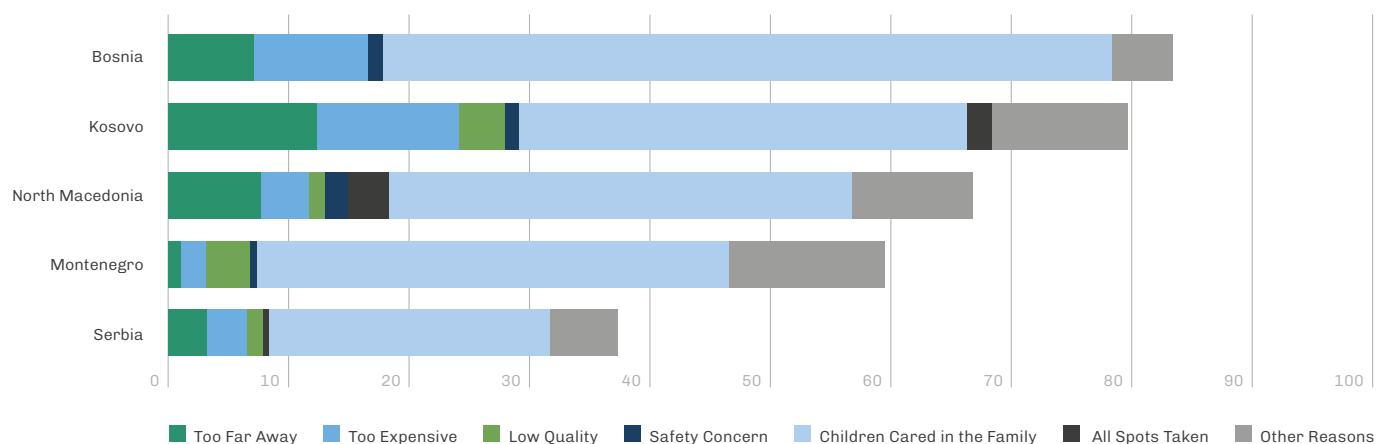
DEMAND-SIDE CONSTRAINTS

Despite efforts to expand childcare provision, many families across the Western Balkans do not use formal ECEC services, even if available. According to Fruttero et al. (2026), also prepared as background for this report, around 56 percent of households with children aged 0–6 and 65 percent of those with children aged 0–3, on average across Western Balkan countries, do not utilize formal childcare. Their analysis discusses the reasons for this, pointing to the presence of persistent demand-side barriers that go beyond the physical availability of services.

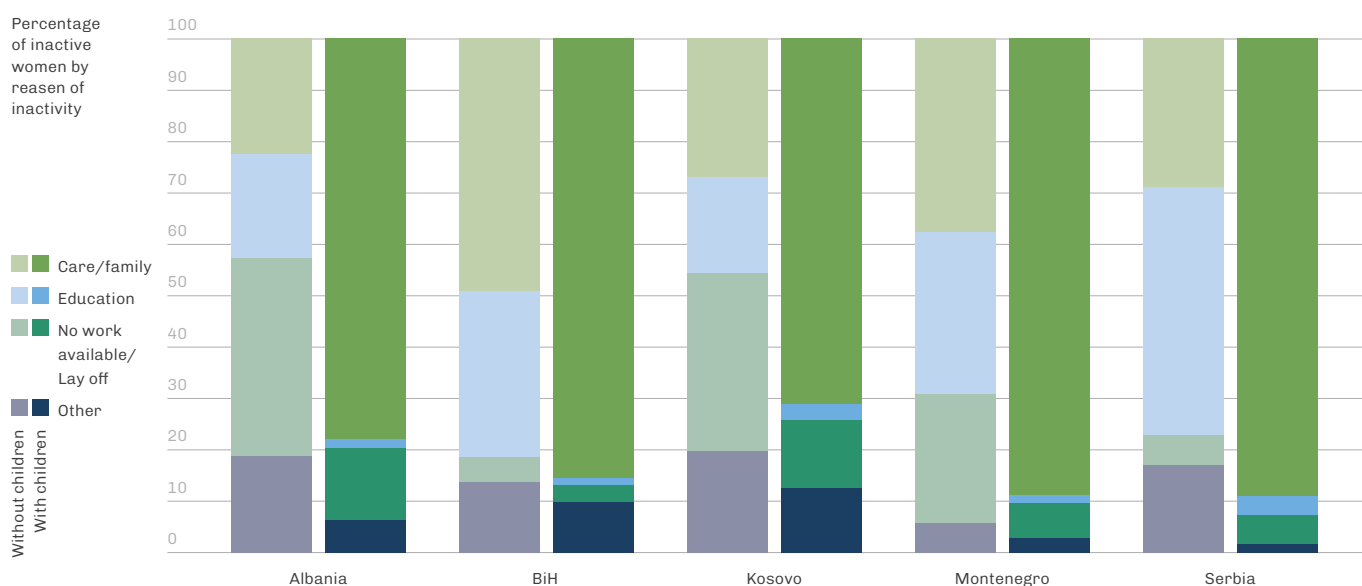
A predominant reason parents cite for not enrolling their children in childcare is the availability of care within the household. Across the region, traditional caregiving responsibilities are deeply gendered, with expectations that women, regardless of their employment status, will assume primary responsibility for childrearing. According to Fruttero et al., the share of families reporting that they do not use childcare facilities because children are cared for by relatives ranges from around 40 percent in Albania to nearly 70 percent in Bosnia and Herzegovina (Figure 11). This preference for in-home or kin-based care reflects deeply rooted norms regarding maternal responsibility and uncertainty about external care arrangements, particularly for very young children.

These dynamics can translate into labor market inactivity for women, especially those of childbearing age, or women choosing lower productivity, but more flexible, forms of employment if they do work. Across the region, caregiving responsibilities, primarily childcare, is the most commonly cited reason for women's absence from the labor force, particularly among women aged 25 to 34 who have children (Figure 13) (Fruttero et al., 2026).

In addition to social norms, a number of other barriers further constrain parental demand for ECEC. Distance to facilities and lack of transportation infrastructure also play a role in discouraging use of formal childcare services, particularly for

Figure 11. Share of households not using childcare facilities, by main reason

Taken from Fruttero et al., 2026.

Figure 12. Reasons for inactivity for women between 25 and 34 years old, with or without children 6 years old or younger

Taken from Fruttero et al., 2026.

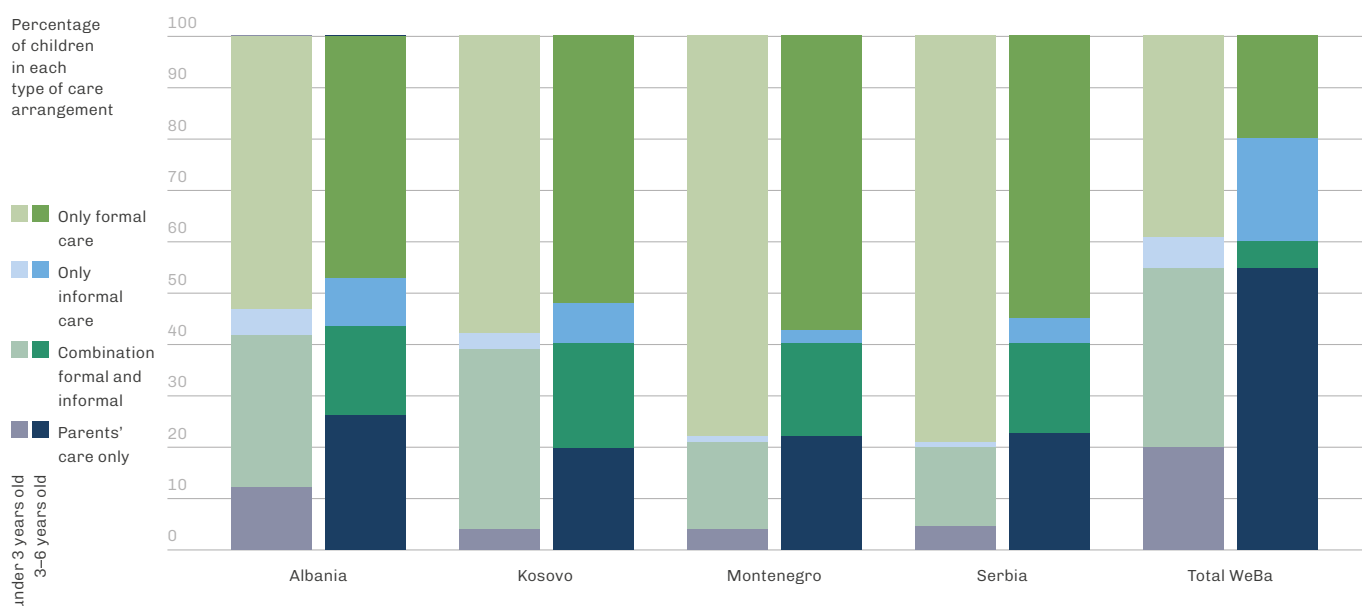
Note: no data was available for North Macedonia.

rural families for which centers are not close by (Figure 12). In Kosovo and Serbia, many rural families face long commutes to the nearest ECEC center, with no guaranteed transportation (World Bank, 2022). In Albania, children who live more than two kilometers from a kindergarten are entitled to free transport, but this assistance is managed locally and applied unevenly. Costs are also often cited as a reason for lack of enrollment in countries such as Kosovo and BiH.

While quality concerns are not the most frequently cited reason, they are nevertheless important. Parents in Serbia, for instance, report dissatisfaction with the responsiveness and practical operation of services—including opening hours and the perceived sensitivity of educators to children's needs (World Bank, 2017). In Kosovo, qualitative data also reveal some mistrust in ECEC institutions. According to parental interviews, 45.5% of respondents cited general mistrust in service quality as a reason for not enrolling their children.

For children under the age of three, the preference for informal care, whether by a parent, grandparent, or other family member, is especially strong. Fruttero et al. report that over 50 percent of families with children in this age group rely exclusively on informal arrangements for children in this age group (Figure 14). In Kosovo, for example, many parents view children under three as too young to attend kindergarten, and they do not see an additional value of sending children to external care providers.

Figure 13. Share of children by type of care arrangement and age group



Taken from Fruttero et al., 2026. Recent data not available for BIH and North Macedonia.

Nevertheless, attitudes are not uniform across countries. In Albania, focus group discussions with parents and grandparents reflect more favorable views toward early childcare, particularly among working mothers. Many parents reported enrolling their children in nursery care shortly after the end of maternity leave, sometimes even before, in order to return to work. Early enrollment was seen not only as a necessity, but also as beneficial to children's social development and later adjustment to kindergarten. The presence of grandparents in the household was viewed as a complementary, rather than substitutive, source of care, useful for evenings

and weekends or for assisting with transportation, but not necessarily replacing nursery enrollment.

SUPPLY-SIDE CONSTRAINTS

In many countries, the supply of public preschool slots has simply not kept up with demand or population needs. For example, as of 2023 Kosovo had only 54 public preschool institutions nationwide for its 38 municipalities, leading to severe under-supply (Gomez Tamayo and Shmis, 2026). Even in Serbia, which has an extensive network, major cities like Belgrade and Novi Sad have historically had thousands of children on waiting lists for public kindergartens (though this has improved recently with new construction). Age-appropriate infrastructure is another issue: some existing facilities are old or not designed for young children (e.g. repurposed school classrooms lacking child-friendly toilets or play space). Where public provision is lacking, private childcare has emerged—but this often means high fees that exclude low-income families.

On the supply side, significant barriers continue to restrict the availability of ECEC services across the Western Balkans. While the number of nurseries, kindergartens, and pre-school educators has increased in recent years, overall coverage remains low, especially for children aged 0 to 3.

These low enrollment rates are partly explained by low availability, with large waiting lists across countries. In the capital of Albania, Tirana, where there are 39 public nurseries, demand still exceeds supply, with over 400 children on waiting lists in recent years. In Bosnia and Herzegovina, 6,605 children aged 3–6 were waiting for a place in a preschool institution in 2022, equivalent to 17 percent of the total number of enrolled children in that age group (Agency for Statistics of Bosnia and Herzegovina, 2023). And in Kosovo, the current sector capacity meets only about 30% of the total childcare demand.

These challenges are compounded by severe geographic disparities in service availability. In Kosovo, nine out of thirty-eight municipalities lack any ECEC institutions. In North Macedonia, 13 out of 80 municipalities have no formal ECEC provision (World Bank, 2023). In Bosnia and Herzegovina, the situation is particularly dire in rural and remote areas, where public kindergartens are either nonexistent or extremely difficult to access. Cities typically offer some public or private options, but these are often oversubscribed, and rural regions remain deeply underserved (UN Women, 2023). In Albania, in some municipalities such as Shkodra and Durrës, the number of public nurseries is strikingly low, with only 6 and 4 facilities respectively—two of which in Durrës remain damaged following the 2019 earthquake. Lastly, in Montenegro, 10 out of 25 municipalities, mostly those in rural areas and in the northern region, lack sufficient childcare institutions with overcrowded classrooms or lack of services altogether.

Limited program duration also reduces accessibility. In Kosovo, most community-based ECEC centers operate with shortened hours that may not be sufficient for

working parents. In Bosnia and Herzegovina's Republika Srpska, mandatory pre-school lasts only 120 hours annually, while in North Macedonia, full-day programs (typically 9 hours) are generally available only to children whose parents are both employed, excluding those with different working arrangements (Eurydice, 2025). Staff shortages further strain the system, particularly in Kosovo and Bosnia and Herzegovina, where the number of trained childcare professionals is insufficient to meet growing demand.

As formal systems struggle to meet growing demand, informal and unregulated childcare options are proliferating. In Bosnia and Herzegovina, these include unregistered day centers or associations of citizens that operate outside of the national preschool framework, lacking any oversight or standardized quality controls. Similarly, Kosovo has nearly as many unlicensed childcare centers as licensed ones, raising serious concerns about safety, pedagogy, and equity in early learning.

Low coverage of vulnerable families and limited affordable childcare

Access to ECEC services remains unequal across the Western Balkans, particularly for vulnerable groups such as ethnic minorities, rural households, children with disabilities, and children from low-income or households with unemployed parents.

Urban-rural disparities in enrollment are particularly notable. In every Western Balkan country, ECEC facilities are concentrated in cities and larger towns, leaving rural areas underserved. This results in much lower enrollment outside urban centers. On average across countries, 58% of urban households with children aged 0–6 use childcare services, compared to only 30% in rural households (Fruttero et al., 2026). In North Macedonia, children in urban areas are more than twice as likely to be enrolled in preschool (47%) than those in rural areas (20%) (World Bank, 2023). In Kosovo, the enrollment gap for children 3–4 years old is also pronounced —26 percent in urban areas versus 8 percent in non-urban locations (UNICEF, 2020), as it is in Montenegro where 80% of children are enrolled in urban areas, while rural areas have enrollment rates below 40% (UNICEF, 2022), and in Serbia, where only 25% of children aged 3 to 5.5 in rural areas participate in ECEC services. In Albania, while the number of public crèches rose by 25 percent between 2016 and 2023 —from 96 to 127— the distribution remains highly uneven. Tirana accounts for 48 percent of the national total, while rural municipalities are significantly underserved. Around 30 percent of municipalities (18) have no public crèches at all (World Bank 2025b).

Enrollment rates among minority populations remain significantly below national averages. In Kosovo, only 10 percent of children from Roma, Ashkali, and Egyptian (RAE) communities participate in ECEC, making up just 3% of total enrollees in public institutions (MESTI, 2024). Similar disparities exist in Albania, where Roma children

—who face compounding socioeconomic and linguistic barriers— make up only 0.8% of children in pre–primary education and are overrepresented in dropout statistics. In North Macedonia, participation in ECEC for children aged 3–6 is 54 percent among ethnic Macedonians but drops to 14 percent for ethnic Albanians and just 12 percent for Roma children (World Bank, 2023). In Serbia, only 7 percent of Roma children are enrolled in preschool (World Bank, 2022), while in Montenegro, the rate is between 20 and 30% for Roma and Egyptian children compared to 57 percent for the general population (UNICEF, 2022). Barriers to access include limited infrastructure in marginalized areas, lack of documentation, language obstacles, social norms, and discriminatory practices.

Access to ECEC for children with disabilities is similarly constrained. In North Macedonia, less than 5 percent of children with disabilities are enrolled in ECEC (UNICEF, 2021). In Albania, parents report insufficient support services for children with disabilities—such as psychologists, teaching aides, and social workers—alongside overcrowded classrooms and low educator–to–child ratios. And in Bosnia and Herzegovina, challenges include outdated skills among providers and the absence of a harmonized definition of disability, which make provision of ECEC services for this group challenging.

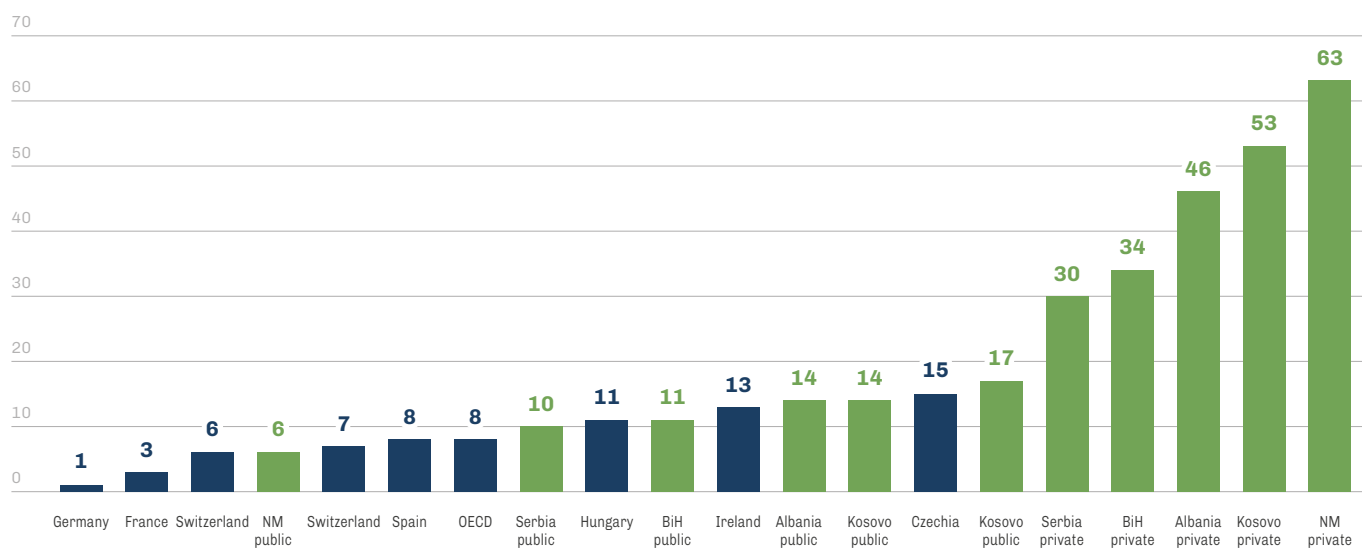
As discussed earlier, there are several factors, beyond the availability of services, that may explain these outcomes. One of the key reasons behind the lack of effective demand for childcare services among the most vulnerable is affordability. Without strong subsidy mechanisms, affordability remains a barrier, especially for larger families or single parents.

In Bosnia and Herzegovina, despite rising public support for private providers in the Federation, government subsidies per child remain significantly lower than in public preschools. With public provision unable to meet demand, many families turn to private care, often at great financial sacrifice (UNICEF, 2023). Fees in the private sector are significantly higher than in the public sector—around double in BIH and as much as 16 times higher in North Macedonia (Table 2). For families with two children and only one employed parent, this means spending between 30% of their income in Serbia and 63% in North Macedonia on private childcare. Accessing public childcare, in contrast, would require only 10% and 6% of their income respectively (Figure 14).

Partly reflecting limited public financing, the use of childcare facilities depends on households' capacity to pay. Higher–income households (top 60 percent) make greater use of childcare than lower–income households (bottom 40 percent), as observed in Figure 16. Among higher–income families with children in the relevant age group, 54 percent of those with children ages 0–6 and 36 percent of those with children ages 0–3 are enrolled in childcare (Figure 15). In comparison, among the lowest–income families, it is 42 percent among those with children ages 0–6 and 35 percent among families with children ages 0–3 attend (Fruttero et al., 2026).

This issue is often aggravated by the fact that many ECEC systems prioritize enrollment for children of working parents, which can then crowd out spaces for

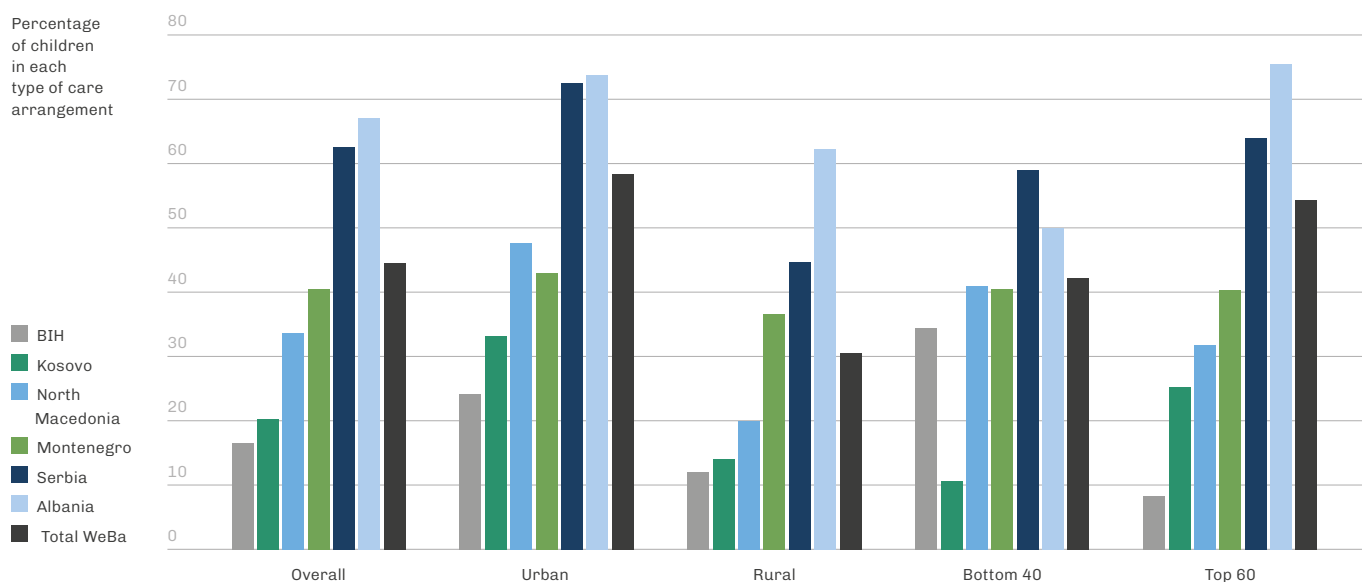
Figure 14. Childcare costs for a single parent with two children as a percentage of the income, considering no benefits designed to reduce the cost of childcare fees



Note: using the latest data available. The prices for the Western Balkan countries are calculated based on the lowest end of the fee ranges. For the calculation, the wage data from the wiiw Institute was used.

Source: OECD, 2025; wiiw institute.

Figure 15. Use of childcare facilities among households with only children 0–6 years old



Taken from Fruttero et al., forthcoming.

children from vulnerable groups. This system also effectively excludes those children whose caregivers are unemployed, are looking for work, or work in the informal sector. In Serbia, for example, institutions with long waitlists often apply non-transparent admission practices, favoring children of employed parents despite bylaws advocating for broader inclusion (World Bank, 2017). In North Macedonia, full-day care is typically reserved for children whose parents are employed full-time, though municipalities may extend access to other groups based on capacity (MoLSP, 2022). In the Federation of BiH, a points-based system governs enrollment, often privileging dual-earner households. In 2021, 85 percent of children enrolled in ECEC came from families with two working parents, compared to just 1 percent from households where both parents were unemployed (UNICEF, 2023). A similar practice is also observed in Kosovo.

Prioritization practices, limited availability of public preschool spaces, and parental preferences collectively contribute to making economic status a key determinant of access to ECEC. In Kosovo, only 3 percent of children from the poorest quintile were enrolled in ECEC programs as of 2020. In BiH, enrollment in preschool is heavily skewed toward wealthier families: just 7 percent of children in the lowest income quintile attended kindergarten in 2018, compared to 67 percent of children in the highest (World Bank, 2023). Serbia shows similar patterns, with over 80 percent of children from the wealthiest quintile enrolled, versus just 11 percent from the poorest (World Bank, 2022). In North Macedonia, the disparity is even starker—only 1 in 300 children from low-income families attend preschool (UNICEF, 2021).

Insufficient financing

Adequate financing is the foundation for expanding and sustaining childcare services. In the Western Balkans, however, public investment in ECEC has historically been low (see Figure 8), resulting in funding shortfalls for infrastructure, staff, and subsidies. Families that turn to private providers often shoulder significant costs, which can make formal childcare unaffordable for many.

Most countries in the region fall short of the international benchmarks outlined in the Education 2030 Framework for Action, which recommends spending at least 15–20% of total government expenditure or 4–6% of GDP on education. Instead, education spending averages just 3.9% of GDP—over 20% below the OECD and EU averages (OECD, 2024a). This underinvestment directly affects the ECEC sector, where public financing remains limited, and the funding that is available is often absorbed by recurrent costs, especially salaries, leaving little room for expanding access, upgrading infrastructure, or improving service quality (OECD, 2024a). Funding shortages often translate into overcrowded public kindergartens and long waiting lists, while private institutions—though more flexible and often better equipped—are priced beyond the reach of most low- and middle-income families.

Fragmentation at the central level and between central and local levels, exacerbates the financing challenge. In North Macedonia, the central government is the primary funder of ECEC services, channeled mainly through the Ministry of Social Policy. However, a lack of transparency in inter-ministerial financial flows makes it difficult to track spending and assess whether it meets local needs. Municipal contributions remain limited due to budget constraints and legal restrictions (e.g., the inability to top up teacher salaries), resulting in minimal local capacity to fill funding gaps (Eurydice, 2025). A uniform funding formula exacerbates regional disparities by failing to account for differences in costs and needs. Similarly, in BIH, affordability challenges are compounded by fragmented and unequal financing across the entity, cantonal, and municipal levels. While some areas —like Sarajevo Canton— subsidize private center fees or offer direct grants, many municipalities lack the fiscal capacity to do so. As a result, household out-of-pocket spending remains high and access to services uneven.

Where local governments subsidize fees, budget constraints can lead to fee hikes or cuts in service hours. For example, in some BIH cantons, kindergartens have had to shorten their working hours or freeze enrollments due to lack of funds —pushing parents towards private options or informal care. In Kosovo, public pre-primary classes in schools could be operating for only 2–2.5 hours per day (due to limited funds and space), which does not meet working parents' needs, often forcing them to pay for additional private childcare or rely on family.

Limited public financing not only limits possible financial support to families but also undermines efforts to expand the ECEC workforce and improve service quality. Without targeted investments in staff recruitment, training, and adequate remuneration, expanding access may come at the cost of quality. This is particularly relevant given the region's low enrollment rates among vulnerable children and the increasing recognition that quality matters most for these groups (Cascio 2015). Parents interviewed in public centers stressed the need to raise educators' salaries to reflect the responsibility entrusted to them, suggesting that inadequate compensation is undermining the attractiveness of the profession and limiting staff retention. So not only the existence of services, but the extent and quality of services provided, are tied to financing levels (we will discuss quality later, but it's worth noting how financing and quality interact).

Fragmented institutional frameworks

The lack of clear, workable institutional arrangements has been identified as a constraint in every country in the region. The institutional complexity —marked by overlapping mandates, uneven decentralization, and weak coordination— undermines efforts to ensure coherent policy planning, implementation, and accountability. As a representative from the National Institute for Social Protection in Serbia put it,

“Cooperation exists but is challenging, as integration of social protection, education, and health sectors is complex and ongoing”. This limited cooperation also creates potential barriers for private investment in the sector.

In Bosnia and Herzegovina, governance fragmentation is particularly acute. The country is divided into three administrative units with distinct legal and institutional frameworks, and within the Federation of BiH, further complexity arises as each canton and municipality implements ECEC policy separately. Despite the adoption of the Framework Law on Preschool Upbringing and Education, harmonization of legislation across jurisdictions remains incomplete. As of 2022, several education authorities had yet to align their local laws with the Framework Law—more than a decade past the original deadline (Ministry of Civil Affairs, 2022). Some cantons are still drafting the necessary laws, while others have yet to adopt them, and there is no mechanism to hold authorities accountable for inaction. This legal setup results in unequal access to core services, such as inclusive education for children with special needs or mandatory preschool programs. Moreover, in the absence of a unified curriculum, ECEC programs vary widely in quality and content across and within administrative units, with services often tailored to local norms and capacities rather than national equity goals.

Albania has undergone a decentralization process that shifted responsibility for ECEC infrastructure and day-to-day operations to local governments, while the Ministry of Education and Sport retained control over staffing and oversight (UNESCO, 2024). Despite the creation of regional and local education offices, this dual structure has created coordination challenges, as responsibilities remain ambiguously distributed. Local governments are often under-resourced and lack the capacity to oversee education quality effectively—particularly in larger municipalities. While national institutions such as the General Directorate of Pre-University Education and the Agency for Quality Assurance exist to guide and evaluate the system, overlapping mandates and insufficient staff for inspection and monitoring limit their effectiveness. Interview data suggest that although rules and regulations are generally seen as adequate, clarity in individual roles—particularly at the regional level—is low. Stakeholders note that implementation suffers from short-term focus, with an overburdened Ministry of Education lacking a long-term strategic vision (UNESCO, 2024).

Similarly, in North Macedonia, ECEC quality assurance is split between the Ministry of Education and Science and the Ministry of Social Policy, Youth and Demography, leading to institutional overlaps and ambiguous lines of accountability. Monitoring and evaluation tools are underdeveloped, and there is limited analytical capacity to support evidence-based decision-making. Stakeholders highlighted the need for stronger intersectoral cooperation, particularly in data sharing, between the ministries of Education, Health, and Social Protection. The lack of strong data culture hampers planning and the development of targeted policies.

In Kosovo, the legal framework prioritizes vulnerable children, but implementation lags. Children aged 3–5 are often neglected in policy execution. Moreover, the absence of a national curriculum, combined with limited training for educators,

further erodes the system's ability to ensure quality and consistency across providers. Fragmentation also impedes the translation of legal commitments into practice, with insufficient cooperation between ministries and limited capacity among providers to serve marginalized groups effectively. Similar coordination issues across ministries are observed in Serbia, where coordination among education, health, and social sectors is limited, resulting in fragmented service delivery, with representatives from the National Institute for Social Protection expressing that "cooperation exists but is challenging, as integration of social protection, education, and health sectors is complex and ongoing".

These governance challenges could be particularly acute in the very early years. In Albania, for example, crèches are not formally recognized as educational institutions under the relevant law on the Pre-University Education System. The fragmented structure has left children under age three without formal oversight or quality assurance mechanisms (World Bank 2025b).

Gaps in human resources and quality assurance

Research shows that teacher–child interactions are the single most important determinant of quality in ECEC. The effectiveness of ECEC systems in the Western Balkans is significantly constrained by systemic weaknesses in both quality assurance mechanisms and the development and retention of qualified human resources. While a few countries have made notable strides, progress remains uneven and fragmented across the region. Focus group discussions and ad-hoc reports on parents' feedback indicate that parents with children in established urban public kindergartens often express satisfaction with the care and learning their children receive, which indicates that those centers meet a basic quality threshold (trained teachers, caring environment). However, quality is not consistent: for example, it can vary drastically between an urban center that serves as a model and an underfunded rural group; the few systematic assessments that exist in the region tell this story of uneven quality, particularly affecting the most vulnerable. In focus groups in the Balkans, parents often cite caring and dedicated teachers as a strength of their local kindergarten, but they also worry when they see staff overstretched or untrained in certain areas (e.g., how to deal with a child's challenging behavior). Building a supported and capable workforce with a minimum level of quality everywhere is, hence, a defining challenge in the region.

Underpinning this challenge are some structural and process quality elements that appear weak: classes can be overcrowded, not all countries require kindergarten teachers to have higher education, continuous training is limited, support for children with special needs is minimal, and there is little systematic evaluation of child outcomes in ECE. In a number of countries in the region, including Albania, Serbia, and Kosovo, formal mechanisms to assess children's progress in ECEC are lacking.

As mentioned by a Representative from the National Institute for Social Protection, Serbia, “While quality standards do exist, they are fragmented and insufficiently developed, particularly in areas specific to childcare such as group sizes, staff–child ratios, safety, and nutrition”. Furthermore, these standards are often inconsistently applied or disconnected from broader strategies for system improvement. Typical monitoring activities include annual supervision visits and data reporting, but there is limited systematic use of parental feedback and self–evaluation practices. In Kosovo, for example, monitoring and evaluation frameworks for ECEC are poorly defined, resulting in inconsistent oversight and a lack of uniform standards across institutions. Although Bosnia and Herzegovina employs professional pedagogical supervision to ensure regulatory compliance, national standards are not applied at all, and annual supervision visits are unevenly conducted, resulting in large quality gaps. In Albania, while there are national institutions that oversee education quality, the absence of a cohesive, ECEC–specific national strategy undermines consistent quality assurance in the early years. The issue is particularly salient for ECEC for those aged 3 and below, where the Agency for the Assurance of Quality in Pre–University Education only evaluates services for children aged 3–6. While Parent Councils have a legal role in monitoring both crèches and kindergartens, most municipalities lack the capacity to implement this effectively (World Bank 2025b).

One emerging area of focus is the content and innovation in curriculum—for instance, integrating modern themes like digital skills, STEM, and socio–emotional learning even at the preschool level. The Western Balkans are starting to incorporate these. Some programs have introduced innovative pedagogies. Serbia, for example, introduced “Years of Ascent” in 2018, a national preschool framework for local institutions to develop their own curricula. The framework emphasizes a life learning culture, project–based learning, and universal design for learning (adjusting the learning environment to meet the needs of all learners). Implementing these innovations consistently at scale will require substantial teacher training and resources.

Formal inspection systems are weak in some places. Ideally, an inspectorate would periodically visit each childcare provider to assess compliance with standards (group size, safety, curriculum delivery, etc.) and provide feedback. The frequency of inspections has often been low due to resource constraints. For example, in some countries, a preschool might be officially inspected only once every several years, if at all. Private providers until now were often only inspected at licensing and rarely thereafter, unless a complaint arises. Where inspection exists, it often lacks specialization—inspectors might be general education officers, not specifically trained in early childhood development. This can limit their effectiveness in identifying issues unique to ECE (like interactions quality or play–based curriculum fidelity).

The lack of quality assurance is further compounded by large gaps in the human resources for ECEC provision. In the Western Balkans, the workforce faces several issues: shortages in some areas, uneven qualifications, low wages in many cases, and limited professional development opportunities.

Challenges start with difficulties in recruiting and retaining qualified staff, especially in rural or under-resourced areas. As noted before, some countries face teacher shortages—not necessarily in absolute numbers at the national level, but in specific regions or for expansion plans. Migration and attrition contribute to shortages and turnover. In Albania, for example, small schools in rural regions face difficulties managing staffing needs despite incentives like transportation compensation (UNESCO, 2024). In Bosnia and Herzegovina, a shortage of preschool educators—particularly in private kindergartens—forces institutions to raise fees to retain staff.

A crucial dimension here is the attractiveness of the childcare profession. In many Western Balkan societies, salaries for ECE teachers are often below those of primary or secondary teachers and below the average for the whole economy. Low pay levels demotivate workers and lead to talent attrition, with many educators seeking better-paying jobs in public institutions or abroad, particularly in EU countries like Germany. Enrollment in preschool education university programs is declining in areas such as Sarajevo Canton, indicating waning interest in the profession (Nezavisne novine, 2023).

A notable issue is the lack of consistency in educational profiles and job titles, creating inefficiencies and confusion. Furthermore, a significant gap exists between theoretical training and practical application. Many professionals enter the workforce with strong academic backgrounds but insufficient hands-on experience, leaving them unprepared for the realities of ECEC institutions. Practicum programs, which are essential for bridging this gap, remain underdeveloped, with limited collaboration between training faculties and ECEC centers. Given the lack of training opportunities, it is also difficult for professionals to keep up with developments in the field.

Continuing professional development for ECEC staff in the Western Balkans is generally fragmented, weakly institutionalized, and often disconnected from career advancement. While Montenegro, Serbia, and North Macedonia have relatively more structured systems—with North Macedonia requiring license renewal every five years and offering tiered, specialized training—there is still limited linkage between CPD participation and professional progression. In other countries, such as Albania and Kosovo, CPD remains largely informal, often relying on peer coaching or ad hoc donor-funded initiatives. Training is rarely based on systematic needs assessments and is especially lacking for inclusive education and support for children with disabilities or from marginalized groups. Private sector educators in Kosovo face particularly limited training opportunities, contributing to high turnover. Across the region, low and uncompetitive salaries further hinder efforts to attract and retain qualified staff, particularly in under-resourced municipalities where education departments lack capacity and funding (OECD, 2024a).

5. Improving childcare provision and growing the childcare economy in the Western Balkans

To expand access to affordable, quality childcare across the Western Balkans, it is essential to address the key challenges outlined above and pursue targeted policy reforms and investments that reflect the diverse needs of families and young children. Doing so will not only improve child development and support family well-being but can also create jobs and enable more women to participate in the workforce and contribute to greater opportunity across the region—both now and for future generations.

To provide guidance on how governments can strengthen their childcare system to achieve these goals, we focus on five policy goals that map closely to the aspects discussed in previous sections (Figure 16):



- 1. Expanding access through diverse service provision:** ensuring that childcare options cater to varying family needs is essential. By offering a range of services and for an adequate number of hours, the system can attract families from different backgrounds as well as funding, thereby broadening access. Expanding access in the region would benefit from not only public provision but also expanded private provision, even if attendance—particularly for the most vulnerable—is subsidized.



- 2. Prioritizing coverage for vulnerable families:** equitable access to childcare requires targeted government support to provide low-cost or free options for vulnerable families. This approach is critical to ensuring that all children, regardless of their socio-economic background, can benefit from quality childcare.



3. Securing sufficient funding: adequate funding is necessary to keep childcare affordable while maintaining high-quality standards. This involves mobilizing resources to support the infrastructure and operations of childcare services. This calls for not only putting more resources into the system but also using resources more effectively. This, in turn, should start by strengthening the data collection, monitoring, and evaluation functions of the system as well as reviewing funding mechanisms to ensure they support the primary goals of the system.

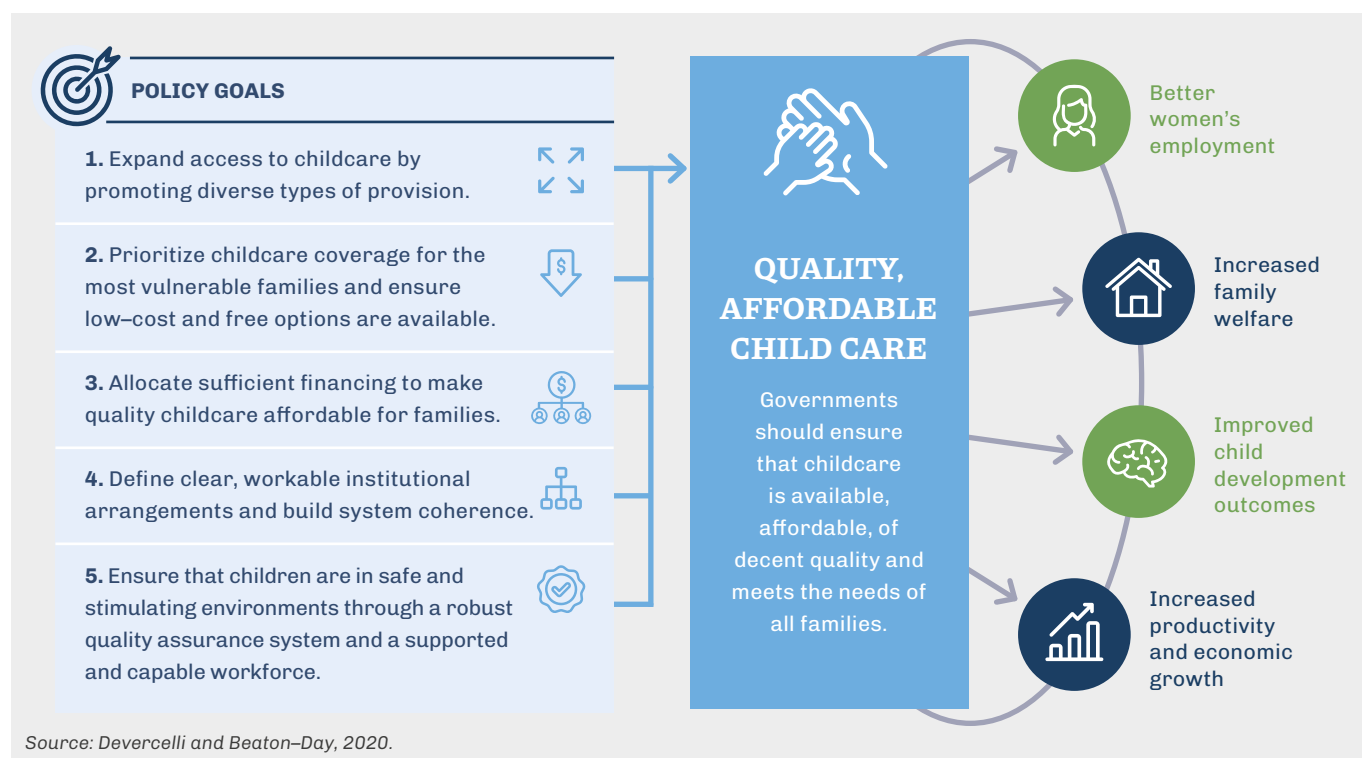


4. Establishing clear institutional frameworks and system coherence: addressing policy fragmentation and improving planning are essential for a coherent childcare system. Clear institutional frameworks help streamline processes and enhance the effectiveness of childcare policies.



5. Ensuring safe and stimulating environments with a well-supported workforce: creating safe and stimulating environments is key to encouraging parental uptake and maximizing the developmental benefits of childcare. A sufficient and well-supported workforce, equipped with the necessary skills and resources, is fundamental to delivering high-quality childcare services.

Figure 16. Policy goals to improve access to affordable and quality ECEC



In this section, we discuss different approaches to meeting these goals, drawing on both regional findings and international best practices (particularly lessons from OECD countries). For instance, Slovenia's experience (as a former Yugoslav peer that now has very high enrollment and an integrated ECEC system) is a model frequently discussed, including practices, like combining nursery and kindergarten under one roof and heavy municipal involvement with strong state support. This section highlights these examples but also emerging practices in the Western Balkans itself—including diverse service models, public–private partnerships, and technology or program innovations—and how they contribute to the evolution of childcare systems in the region.

Meeting goal 1: Expanding access through diverse service provision by supporting private and community-based provision

SUPPLY-SIDE INTERVENTIONS

Governments in the region continue to make significant strides in expanding public ECEC provision. For example, Serbia has built new ECE facilities and repurposed existing infrastructure in disadvantaged areas with the support of the World Bank, resulting in a significant increase in ECEC enrollment from 52% in 2018 to 74% in 2024 in the regions exposed to the investments. To implement the new preschool curriculum, over 21,000 preschool teachers (95% of all preschool teachers) and 3,000 primary school pedagogical staff have been trained in child-centered, play-based pedagogy (World Bank, 2025a).

Similarly, Kosovo has expanded its kindergarten provision, with four new kindergartens completed in 2021, 26 under construction, three school buildings being adapted for ECEC use, and eight additional kindergartens in the tendering phase (Gomez Tamayo and Shmis, 2026). North Macedonia also has plans to expand its public preschool provision, aiming to build and equip 110 public preschool classrooms, adding 2,200 new preschool spaces by 2027. As part of this effort, the country is piloting a range of childcare provision models with the support of the World Bank, developing the enactment of a licensing system, strengthening caregiver training, establishing workable institutional arrangements, and developing a robust monitoring mechanism (World Bank, 2023).

In addition to building new facilities to expand public provision, governments in the region have also innovated and adapted their provision to reach more children. For instance, Serbia's Law on Preschool Education allows for the establishment of separate units in rural areas or the use of specially equipped buses to reach children in remote locations (Eurydice, 2025).

Despite these efforts, ECEC infrastructure is still insufficient (too few centers and classrooms to serve all communities) and the system faces capacity constraints

(facilities that do exist often have long waiting lists, especially in urban areas). The demand for ECEC services remains high, and the current provision is not sufficient to meet the needs of all children. This is evident in the long waitlists for public kindergartens and the limited availability of private ECEC services, particularly in rural and disadvantaged areas. Parents also make this issue evident, with parents in a focus group in Serbia expressing that “Waiting lists exist, especially for children without parental care”.

To address this issue, it is essential to continue increasing public provision, for example by repurposing public spaces, integrating childcare into schools, and supporting flexible models (e.g. mobile units). Repurposing existing public spaces and using underutilized school facilities, in particular, can make the expansion more efficient, given demographic trends. This is a model being followed in North Macedonia and Serbia, for example Kosovo is investing in modular kindergarten centers, built using prefabricated parts assembled at designated locations, a method that could reduce costs and time of the initial construction but that could, however, come at the expense of durability and quality.

Integrating childcare into schools, in turn, would involve adapting current classrooms to suit the needs of younger children and investing in appropriate teaching materials and outdoor areas for young children. Serbia and Albania have both started doing this: e.g., opening preparatory preschool classes in primary schools, or even co-locating full kindergarten units in school premises so that facilities (playgrounds, heating) are shared. This approach can indeed be more cost-effective and quicker to implement than constructing new buildings. It also has the potential to provide a seamless educational transition for children as they grow older. However, careful planning is needed to ensure that integration meets the specific developmental needs of early learners and that the quality of care and education is maintained or enhanced. This would likely involve additional training for teachers, appropriate curriculum development, and possibly the hiring of specialists in early childhood education (Shmis 2024).

Flexible models, including mobile teams and community or home-based services, are also expanding and can do so further. Mobile teams in North Macedonia (part of the EU Child Guarantee Pilot project) that visit remote villages to conduct early childhood sessions for children and parents—a form of mobile kindergarten—bring services closer to families who cannot reach a distant center. These, as well as half-day programs, have been introduced on a pilot basis in remote communities, although coverage remains uneven. Given shortages of formal centers, some countries are trying community or home-based solutions. For example, Kosovo has community-based early childhood centers in areas without public kindergartens, often run by NGOs or local initiatives in rented spaces. These may be part-day programs focusing on school readiness and play. Providing home-based childcare networks is another strategy. This would call for training and certifying home-based child-minders (perhaps mothers in the community) to care for small groups of children in

their homes and include them in the official system. This approach, used in Austria, France, and Canada, for example, increases reach in a community setting.

The expansion of services is necessary not only in terms of coverage and modalities but also in terms of operation hours, particularly when parents are seeking employment or working. In several countries, even minimum hours of operation are not regulated (not for public nor private institutions); when they are, they typically stand at 4 hours (Annex 2: Childcare–relevant legislation in Western Balkans).

Making all these investments will require additional resources. For example, a recent review of public expenditure on ECEC in Albania (World Bank 2025b) uses data from Expertise France, which has estimated the average cost per child for crèche (0–3) repairs and construction in the country. The findings indicate that the crèche repair cost per child is approximately USD 2,915 while new construction would cost approximately USD 10,767 per child. If all children not enrolled in 2023 (56,355) were to be accommodated, the total investment necessary would amount to 2 percent of public expenditure for the repair option and 8 percent of public expenditure for new construction.

Supporting the expansion of the private sector

Governments can also explore other strategies to expand access to ECEC services, particularly by supporting the expansion of non–state ECEC provision. The private sector plays a vital role in expanding access to ECEC services, particularly in countries where public provision is limited. In Serbia, the private sector accounts for 78% of the growth in total ECEC enrollments in the past few years, highlighting its importance in ensuring equitable access (World Bank, 2022). Bosnia and Herzegovina has also seen significant growth in private preschool enrollment, with a 69% increase between 2018 and 2022 in the Republika Srpska (UNICEF, 2023). Beneficiary feedback in Kosovo shows less concerns with private kindergartens' quality of provision than expected and sends a positive message to policymakers (Gomez Tamayo and Shmis, 2026).

To support the private sector, it is important to ensure that the regulatory systems support entry into the sector while also ensuring quality and supporting equity. To start, it would be important to conduct a thorough review and consultations with for–profit and not–for–profit organizations active and interested in the sector to understand constraints to entering the sector and growing, with a particular focus on constraints that affect hard–to–serve segments of the market. For instance, the government might consider implementing targeted financing (like vouchers —see Box 3), supporting providers to secure their financial sustainability, and potentially providing tax incentives. The work in Kosovo on the analysis of private providers suggests these as potential actions for improvement.

The engagement with various stakeholders, including the private sector, can help mobilize resources for childcare broadly. For example, employers can provide or subsidize childcare for employees, donate materials, or provide relevant expertise. There

may be scope, particularly for larger employers or employment clusters, to increase employer–provided childcare. Countries like Germany and Japan have used tax incentives to boost employer contributions to childcare. This is not yet common in the Western Balkans, but there are examples: a few large companies in Serbia and North Macedonia have set up on-site daycare for employees' children. Regulations in the region typically do not mandate this (Annex 2: Childcare–relevant legislation in Western Balkans), but for example, North Macedonia does mandate employers to either provide it, subsidize it, or allow employees flexible work arrangements. While enforcement is limited, it has spurred some companies to take action. A few big employers (like banks or telecom companies in Skopje) have set up on-site daycare or partnered with private nurseries to reserve slots for their employees. Elsewhere, uptake is low, but the concept is on the table region wide as policymakers see encouraging employer involvement as a way to increase provision and support working mothers.⁶

Governments are beginning to consider tax incentives or partnerships to encourage more employer–supported childcare (following OECD examples where such incentives exist). However, in practice, this is still nascent, and significant disincentives and barriers exist. For example, in BIH, despite ongoing pilots, scaling up employer–provided childcare, even if successful, is going to be limited as employers' provision of childcare services to their employees is treated as a taxable non-salary benefit, which can represent additional costs to companies.

Box 3. Triple goals of the Kosovo childcare voucher program

- 1) **Increase equity in access to childcare.** As this program targets Social Assistance Scheme (SAS) population with children of 3–5 years, it increases the provision among this group and helps reach out to the most vulnerable.
- 2) **Stimulate female labor force participation.** This is one of the goals for the project and for the voucher sub-component, as vouchers are provided for childcare services. By definition, childcare means a long period of care, allowing parents to work.
- 3) **Stimulate private provision.** This is one of the first large-scale programs supporting the government financing of the private providers. Only licensed providers can be eligible, and it also stimulates those preschools that operate without a license to obtain one.

Source: authors.

6. See some examples here, for example: <https://www.helvetas.org/en/eastern-europe/insights-and-opportunities/resources/helvetas-mosaic/article/March2021/increasing-employers-role-in-childcare-development>

Furthermore, there is also interest in leveraging the private sector through Public–Private Partnerships (PPPs). Governments can consider tendering out the construction and operation of preschool facilities to private operators, with the state subsidizing fees. Municipalities could rent out or lease on favorable terms existing buildings to private kindergarten operators, expanding the support modalities of the private sector and making use of currently underutilized assets. The state can also pay for spaces in private ECE centers. The Netherlands and Belgium do this, for example. This is what the Bosnia’s Sarajevo Canton has done by contracting some private daycare centers to take in children from the public waitlist, effectively purchasing spaces. These arrangements, if well-regulated, can expand capacity quickly, but need to be accompanied by the strengthening of the regulatory framework to ensure quality and equity in PPPs is still underway. Similarly, North Macedonia has increasingly contracted NGOs and private providers to deliver, for example, day care center services for children with disabilities on behalf of the state, with the aim of quickly expanding access where public provision is thin.

Working with the private sector and through PPPs can expand childcare provision, but it also carries significant risks linked to the differing incentives of public and private actors. Private providers often prioritize financial returns or operational efficiency, whereas governments aim to ensure equitable access and maintain high educational quality. This misalignment can encourage cost-cutting that undermines pedagogy, teacher working conditions, or essential services for children. It may also exacerbate inequalities if private operators “cream-skim,” selectively admitting easier-to-serve children while public institutions are left to accommodate those with greater needs or vulnerabilities (Adamson and Taneja, 2025). In addition, negotiating and managing agreements with private providers is complex and requires substantial government capacity; without strong oversight and careful contract design, governments may inadvertently assume financial risks or fail to enforce standards, weakening the expected benefits of collaboration.

To minimize these risks, partnerships with the private sector must be grounded in clear regulatory safeguards. Governments should establish contractual frameworks that define roles, responsibilities, performance targets, accountability measures, and sanctions for non-compliance. Agreements should adhere to legal, curricular, and quality standards; regulate or cap parent fees to prevent profiteering; and include requirements ensuring inclusion of disadvantaged and marginalized children (Adamson and Taneja, 2025).

Such collaboration is most effective when embedded within a coherent national education strategy. Governments need to clearly articulate the role of private providers in the broader system, select partners through transparent and competitive processes, and design policies that recognize and incentivize high-quality private provision (Aslam et al., 2018). Building trust between sectors is also crucial: public authorities must fulfill their commitments, ensure timely payments, and support private operators in meeting quality standards. Policy frameworks should include

exit strategies, contingency plans, and mechanisms to ensure continuity of services during disruptions.

DEMAND–SIDE INTERVENTIONS

In many cases, expanding the supply of ECEC services can be a necessary but insufficient step toward increasing enrollment. In many countries in the Western Balkans, cultural and social norms favor family–based care, with many parents believing that ECEC services offer little more value than basic daycare. This perception, coupled with a lack of awareness about the long–term benefits of early education, presents a significant barrier to demanding childcare services. Therefore, demand–side interventions must be prioritized alongside infrastructure development and service expansion to ensure that families actually enroll their children in ECEC programs. This is particularly important among the most vulnerable who stand to benefit the most from ECEC and who often may be less willing to use these services.

Governments can offer demand–side financial incentives, such as tax reliefs, and subsidies for parents who enroll their children in these centers, especially given the high costs that such services have in the region. For example, Serbia has introduced vouchers, which have led to increased enrollment in several cities. Similarly, in Kosovo, the government is introducing a subsidy scheme that targets low–income families, aiming to increase access to ECEC services. This approach would help alleviate financial barriers to enrollment, thereby increasing demand and supporting provider growth. Public subsidies need to follow the students and strengthen incentives to deliver quality services to all relevant populations.

Additionally, governments can provide professional development opportunities for private kindergarten staff, enhancing the quality of education and attracting more qualified staff to these institutions, thus increasing trust from parents. This can be achieved by offering private kindergarten staff the possibility of participating in professional development programs available to public sector educators.

Social attitudes toward caregiving, particularly the expectation that childcare is primarily a mother's responsibility, have a direct impact on ECEC uptake. Addressing well–entrenched social norms is not easy, but there is evidence of interventions that have been shown to be successful in changing social norms around childcare and women's family role more generally. One evidence–based, scalable approach is to engage not only women but also men and extended families in redefining norms around childcare and work. For example, a study from northern India showed that presenting video testimonials to husbands and in–laws about women's work opportunities led to increased female labor force participation (Halim et al., 2023). Such intervention could lead to finding alternative ways of providing childcare outside the home. These principles can be applied in the Western Balkans to address traditional views about childcare and motherhood.

Furthermore, to shift perceptions and encourage ECEC enrollment, it is crucial to actively communicate the long–term developmental and social benefits of these

services. Many families are either uninformed or skeptical about the value of ECEC, especially in rural or economically disadvantaged areas. Highlighting how early education prepares children for school, enhances social and cognitive skills, and improves future learning outcomes can help change attitudes. Moreover, for families who rely on one parent (usually mothers) to provide full-time care, emphasizing the economic benefits—such as the potential to return to work or access employment opportunities—can be a persuasive incentive. Clear communication about how ECEC can support household income generation and long-term stability can help overcome reluctance. Evidence from the UK (HM Revenue and Customs UK, 2018) shows that providing unemployed parents with targeted information about the benefits of ECEC and simplified guidance on how to enroll significantly increased participation rates. This underscores the importance of not just building services but also ensuring that families understand both *why* and *how* to use them.

Personal experiences and peer validation can have a powerful influence on parental decision-making. Campaigns that feature testimonials from other parents, especially those from similar socio-cultural or economic backgrounds, can effectively build trust and encourage ECEC utilization. In the UK, for example, exposure to quotes and perceptions from parents who had used ECEC services helped persuade those who had previously not considered such care for their children (HM Revenues and Customs UK, 2018).

Several countries in the Western Balkans have begun implementing targeted communication campaigns to increase demand for ECEC services. UNICEF and the Ministry of Education in Montenegro, for example, implemented a public campaign “Everybody in kindergarten” to promote early childhood education in five municipalities in the north of the country with the lowest enrollment rate (Eurydice, 2025). One notable example is Serbia, where the World Bank supported a nationwide initiative in 2017 aimed at raising awareness about the importance of early childhood development. The campaign focused on:

1. Promoting early stimulation, play, positive parent–child interactions, and health and nutrition practices at home.
2. Informing families about available ECEC services and eligibility for social protection and early learning programs.
3. Encouraging preschool attendance through various communication channels, including mass media and social media, as well as printed materials in places frequently visited by families.

A key strength of the Serbian campaign was its focus on engaging fathers, grandparents, and other caregivers—not just mothers—using role models and public figures as advocates. This inclusive approach helped shift attitudes at the community level and encouraged broader acceptance of ECEC services.

Similarly, to increase childcare enrollment, particularly under the newly launched Voucher Program, Kosovo has implemented a comprehensive information campaign to raise awareness among eligible families. The campaign provides parents with clear and accessible information on the benefits of ECEC and on how the voucher program works. To reach as many Social Assistance Scheme beneficiaries as possible, door-to-door outreach and community-based engagements have been carried out by MESTI, Centers for Social Work, and municipal teams, who jointly provide guidance, answer questions, and collect basic demographic information and concerns reported by families. A tailored brochure and an animated video were developed for this purpose, explaining the program's objectives, eligibility criteria, application steps, and available support channels, including contact details and a simple step-by-step guide for applicants (Gomez Tamayo and Shmis, 2026).

Figure 17. Brochure for communication campaign in Kosovo



Source: Ministry of Education, Science, Technology, and Innovation of Kosovo

Overall, increasing demand for ECEC involves more than just expanding infrastructure or introducing financial incentives—it requires understanding and responding to the cultural, informational, and attitudinal factors that shape parental decisions. The experiences of countries like Serbia and Kosovo suggest that a well-planned, inclusive communication strategy can be a meaningful step toward

fostering greater engagement with early childhood services, and should be considered as possible tools for further expansion across the region.

In sum, meeting the first goal of expanding access to ECEC via diverse provision models, would entail:

1. **Investing in scaling up infrastructure and services, especially in underserved areas.** All countries should make expanding the supply of childcare slots a top priority, whether it is new or repurposed infrastructure.
2. **Embracing public–private partnerships (PPPs) and community–based solutions to increase provision.** Governments should enable and actively encourage non–state childcare providers to operate—not as a replacement for public services, but as a complement to reach more children quickly. Concretely, this means streamlining licensing for private and NGO–run centers, and offering incentives for their establishment in underserved localities. Employer–supported childcare should also be fostered, particularly among larger employers. North Macedonia’s requirement for large employers to provide childcare is a bold step; other countries could institute voluntary incentive schemes if not mandates. More on the PPP arrangements for childcare can be found in Kosovo deep dive prepared as part of this analysis (Gomez Tamayo and Shmis, 2026).
3. **Offering flexible and part–time program options to meet diverse family needs.** Governments should support alternative program modalities: for instance, half–day preschools or “playgroups” in communities where full–day demand is low; seasonal or occasional care programs during peak agricultural seasons to support rural families; and extended–hour or shift childcare in urban areas for parents working non–standard hours. Providing home–based childcare networks is another strategy.
4. **Strengthening demand–side efforts to go alongside supply increases in order to boost enrollment.** This is particularly relevant for the most vulnerable and include not only addressing cost or transport constraints, but also addressing social norms that may limit the demand for childcare services outside the home, particularly for younger children.

Meeting goal 2: Prioritizing ECEC coverage for vulnerable families

Efforts to expand quality early learning should focus first on children from disadvantaged families, as they benefit most from quality ECEC (Cascio 2015; Yoshikawa et al. 2013). Despite challenges, targeting these groups can yield the highest investment returns. Research (Ganimian et al 2024; Martinez et al 2017) shows that even small increases in ECE access significantly enhance learning for the most disadvantaged, making this approach highly cost–effective. Ensuring equitable access to ECEC that

includes children from low-income families, rural areas, minority groups, including Roma and Egyptians, and those with disabilities is also essential for addressing systemic disparities and fostering inclusive development.

Prioritizing childcare options for vulnerable families requires thinking broadly about allocated spaces, targeted provision, financing, communication campaigns and outreach. Moreover, meeting this challenge requires a dual focus: improving targeting mechanisms and service design while also balancing access with quality to ensure inclusion is meaningful in practice.

To reach everyone, it is important to encourage the creation of flexible childcare models, particularly focusing on the unique needs of rural and marginalized communities. These models should be sensitive to the socio-economic challenges faced by these populations. For example, opening child groups in adapted premises allocated by the community; arranging the centralized delivery for remote locations while transportation is arranged by community members; or arranging for trained community members to serve as caregivers, could be models worth exploring. Mobile services, discussed in the previous section, can also help fill some gaps, albeit mostly in a temporary manner.

For children with disabilities or development delays, it would be necessary to develop specialized support programs, offering tailored educational frameworks and resources. Countries in the region are exploring different approaches to address the low inclusion of children with disabilities. For instance, in Serbia, in selected settings, there are childcare groups that include children with disabilities with higher support, integrated within mainstream kindergarten settings. This model moves away from segregated special institutions toward inclusive practice, using itinerant specialists (speech therapists, etc.) who travel to support children in regular kindergartens. North Macedonia has also made efforts on inclusive education particularly in primary school, efforts that could be expanded to early years. There, the system relies on inclusion resource centers that support teachers with strategies and assistants for children with special needs. Over the past four years, in North Macedonia, the number of students with disabilities attending mainstream schools has doubled, increasing from an average of four students per school in the 2019/20 school year to nine students per school in the 2023/24 academic year (UNICEF 2024b). These are new ways of organizing support that depart from the past practice of either exclusion or separate special preschools.

The challenge here is significant since most countries lack the infrastructure and trained staff for inclusive early education. For example, in Kosovo's capital city, only a handful of children with disabilities are enrolled in public kindergartens (and almost none in private). Often these children are either kept at home or attend specialized day-care centers (if available) rather than inclusive preschools. Montenegro, for example, has made progress in deinstitutionalizing childcare—it eliminated institutional care for children under 3—but ensuring those children can enter community-based ECEC with appropriate support is still a challenge (World Bank

and UNICEF 2023). Across the region, there is an urgent need for more inclusive approaches so that disability is not a barrier to early education.

Several countries have made efforts to better target and support disadvantaged groups. In Serbia, for example, the Ministry of Education has defined a comprehensive list of priority groups—such as children from single-parent families, those with disabilities, and children of war veterans—ensuring they are given first access when spaces become available (Eurydice, 2025). Additionally, a municipal grants program has supported tailored initiatives to engage parents and introduce flexible preschool options aimed specifically at increasing participation among socially disadvantaged and marginalized communities. Also in Serbia, there are Roma Education Fund-supported preschools and dedicated enrollment quotas in some municipalities, but the persistent gaps clearly indicate that these efforts have been insufficient. Challenges remain, for example, in ensuring that these funds reach the intended beneficiaries and that outreach and intervention programs are fully implemented. The lack of sufficient infrastructure and resources, particularly in rural areas, hampers the broader inclusion of vulnerable children in ECEC programs in the country.

Experience from outside the Western Balkans can also be informative. Uzbekistan introduced a community-based “one-stop” model offering free preschool services, including home-based learning for children with disabilities. This model also utilized the Mahalla (community) system to identify families in need and reached those in remote areas through mobile kindergarten buses (World Bank, 2025a). In other European contexts, progressive pricing models and targeted fee waivers have shown promise in improving access to ECEC for vulnerable populations. Countries such as Luxembourg, Lithuania, and Romania offer 10 to 20 hours of free ECEC per week, typically for all children but often with special attention to disadvantaged groups. In Norway, free entitlement is reserved for low-income families, aligning fiscal support with need (OECD, 2024b). These approaches not only reduce financial barriers but also help equalize ECEC participation across social groups.

The importance of trust-building and community engagement cannot be overstated when working with minority populations. In Bulgaria, an impact evaluation of a kindergarten access project revealed that removing user fees increased participation among Roma children but failed to improve developmental outcomes—highlighting the need for quality improvements alongside expanded access. The project also underscored the value of having community mediators—often Roma social workers or educators—who act as bridges between the education system and families. This strategy has been successfully implemented in Albania and North Macedonia, where mediators and outreach workers help retain children in the system, encourage re-enrollment for dropouts, and provide culturally sensitive support to Roma communities (Huillery et al, 2020). In Montenegro, the “Caring Family” parenting program expanded its reach by training ECEC staff to engage effectively with Roma and Egyptian families, strengthening the connection between early childhood institutions and underserved households (UN, 2021).

For countries in the Western Balkans, there may be available opportunities to build upon existing programs that serve vulnerable populations (e.g., using them to identify target populations and/or piggyback on services). As part of this process, countries in the region can start by strengthening referral systems linked to broader social services to take advantage of reforms and improvements that are taking place in the broader social protection system. In North Macedonia, for example, Centers for Social Welfare and kindergartens are currently coordinating to improve understanding of the importance of sending young children to preschool among households receiving social assistance in an effort to increase their enrollment (World Bank 2023). A pilot project has recently been initiated in North Macedonia to deliver new early childhood development services. These services will be collaboratively provided by trained professionals from health and rehabilitation centers, kindergartens, school resource centers, and licensed social service providers in the City of Skopje (UNICEF 2025).

Other entry points can also be relevant. Parenting programs, in particular, are critical in supporting children's early development, particularly among the most vulnerable (Bendini and Devercelli 2022), and can be a natural mechanism to reach this population. Countries in the region are strengthening these programs to increase parental outreach and early stimulation at home, and these efforts should be strengthened and used as a platform to expand demand for and access to ECE. North Macedonia has been implementing the Read@Home program that helped boost children's reading assessment scores in the early grades, reaching the poorest 10 percent of families with storybooks and activities to encourage reading at home.⁷ The guidance includes toolkits for the parents to support stimulation of early reading. Kosovo and North Macedonia are starting to implement parenting education modules as part of social services or health visits. Albania has run small-scale parenting programs where trained facilitators hold group sessions with parents (especially mothers) of young kids in communities, teaching them about child development and activities to do at home. Initiatives that integrate childcare into other existing public programs can also provide useful entry points for supporting childcare access among the most vulnerable (e.g. childcare alongside training or public works programs to maximize participation, for example).

Particular attention can be paid to the transition to preschool and primary school. Countries in the region can consider specialized support programs that help marginalized children transition into preschool and succeed there. Examples include language support for children who do not speak the majority language at home; adaptive materials and trained supportive staff for children with disabilities integrated into regular preschools; and parent engagement initiatives to build trust.

Scaling and sustaining innovations is the next challenge. Many of the above efforts are pilot or small-scale. The region often relies on donor projects to introduce new concepts (like community-based preschools or new curricula). A key is whether

7. <https://blogs.worldbank.org/en/education/readhome-effective-partnerships-reach-vulnerable-children-north-macedonia>

governments can institutionalize and scale up successful innovations, which would require strengthening the other elements of the proposed policy framework, including in terms of financing, human resources, and governance.

In short, prioritizing the most vulnerable families for ECEC will require:

1. **Providing financial support to families to reduce the opportunity cost of child-care.** Even with free preschool, very poor families may face indirect costs (transport, clothing, etc.) or may keep older siblings at home to care for younger ones. To counter these barriers, governments could pilot conditional cash transfers or incentives for families to use ECE services.
2. **Informing vulnerable populations.** As mentioned earlier, demand-side interventions are specifically important for vulnerable groups. Therefore, continuous and consistent information sharing, campaigns, and other incentives will remain critical for Western Balkan countries to ensure that children from the most vulnerable families attend preschools. This type of outreach programs can ensure that marginalized children are actively recruited instead of waiting for them to enroll.
3. **Targeted interventions to bridge equity gaps.** First, adopt a policy of fee waivers or heavy fee subsidies for low-income families in both public and private childcare. This is already partly in place, but should be expanded and well-communicated so that no child is kept out due to inability to pay. Means-testing and sliding fee scales can ensure that the most vulnerable attend free of charge or at a symbolic fee. Governments can reimburse providers for these waivers. Second, expand specialized support programs that help marginalized children transition into preschool. For this, countries will need to allocate additional resources (grants) to centers enrolling high numbers of vulnerable kids.

Meeting goal 3: Securing sufficient funding

In the Western Balkans, particularly in Albania, public investment in education — especially in ECEC— remains low relative to national GDP and lags behind other countries in the region. This low expenditure is the result of both a relatively small overall government budget and a low proportion of that budget allocated to education. Given the foundational role of early childhood development in shaping lifelong learning, health, and economic outcomes, increasing public financing for ECEC is critical. Some countries have signaled intent to raise pre-primary funding, but these increases start from a low base—even a doubling of ECE spending would still leave most countries below OECD spending levels.

A growing body of economic research, most notably by Heckman (2006), underscores that investments in early childhood yield the highest returns compared to any other stage of education or human capital development. This is especially true for disadvantaged children, for whom high-quality ECEC can act as a powerful

equalizer, closing early developmental gaps and setting a trajectory for school success and economic participation.

Countries across the globe have acknowledged this importance and increased investment in early childhood education, especially in OECD countries. Between 2015 and 2021, public expenditure on ECEC as a share of GDP grew by 9%, a significant increase compared to other education levels. Enrolment rates in early childhood education have also risen consistently, with 83% of 3–5-year-olds now enrolled in pre-primary education across the OECD (up from 79% in 2013). In 19 OECD countries, pre-primary education has now become compulsory, demonstrating the policy priority being placed in the early years (OECD, 2024b).

In countries with more integrated ECEC systems, such as Denmark and Sweden, strong public financing ensures widespread access to childcare for even the youngest children. In Sweden, the vast majority of ECEC funding comes from municipal budgets, and parents contribute only a small, income-dependent fee, capped at a maximum amount. In Denmark, municipalities guarantee a place for all children older than 26 weeks, resulting in enrollment rates over 85% by age 2 (OECD, 2025). Combining targeted support with universal provision has also been effective in several countries. Sweden, for instance, operates a progressive fee structure: parents pay no fees if their household income is below the national poverty line, and the percentage they pay decreases with each additional child. A similar structure exists in Finland, Estonia, and some German regions, where affordability and access are balanced through a mix of subsidies and capped fees (OECD, 2025).

A longer-term issue is that under-investment now can incur higher costs later —children who miss out on early learning often require more support in basic education. Together with the high returns to ECEC, this argues for increasing public financing upfront. Governments in the region are beginning to recognize that spending on childcare is an investment, not just a cost, but this mindset shift is still in progress amid competing budget priorities.

In the Western Balkans, the current funding landscape for ECEC, thus, remains a constraint on quality, access, and equity. Increasing both the overall size of the education budget and the proportion allocated to early childhood services could dramatically improve opportunities for young children and better prepare the next generation for the demands of the 21st-century economy.

To align with international best practices, governments in the region could consider:

- Introducing targeted and progressive fee structures that make ECEC affordable for low-income families while ensuring broad-based access.
- Ensuring free or heavily subsidized ECEC starting at age 3, with earlier access for vulnerable populations —this has been done to a certain extent with the voucher programs aforementioned.
- Allocating additional funding to providers serving high numbers of disadvantaged children to maintain quality.

Given fiscal constraints, limited funds need to be used efficiently, and this requires more effective targeting of public subsidies, continued expenditure reviews, and reviewing funding formulas to tie more closely to the most critical policy goals of the sector. In 2019, Albania revised its preschool funding formula for municipalities to allocate 60% based on student numbers and 40% on teacher numbers (from before being almost fully based on the number of teachers), aiming to boost coverage (World Bank 2025b).

Additional resources and better targeting of those resources need to be accompanied by the strengthening of the financing and the capacity at the local level when service delivery is devolved to that level. This would require developing funding mechanisms for quality provision at the local/municipal level by, for example, improving per-capita funding allocation while building mechanisms of accountability. It also requires stronger fiscal management across planning, execution, and monitoring processes for municipalities. For example, municipalities in Albania do not have a dedicated budget line for ECEC services, making funding and expenditure tracking difficult (World Bank 2025b). Strengthening these functions can support not only overall provision and quality but also address inequalities that emerge from differences in local level capacities.

Ultimately, adequate financing starts with careful financial planning and predictability. This has broader financial management implications, but across the region, data systems can make this difficult. In Albania, vaccination registers are used to estimate the number of young children, but these figures are unreliable, and there is no monitoring system for crèches. The State Agency for the Rights and Protection of the Child (SAPRC) collects limited data without a validated methodology (World Bank 2025b).

Technology more broadly holds some promise, although investments in this area need to be carefully managed to avoid cost overruns and ineffective systems. Some systems and centers have begun using digital platforms for administration and even pedagogical support. For instance, Serbia's education management information system module for preschools allows online registration of children, tracking attendance, etc. North Macedonia is piloting an app for parents to receive updates from kindergarten (photos, notes) to increase engagement. Given the need to train many staff, countries are exploring online training modules, building on the COVID-19 experience. Countries are also running parenting apps that help them support child development and contribute meaningfully to school readiness and early numeracy and literacy (see Albania's Bebo app, for example).

In sum, increasing financing and making childcare affordable calls for:

1. **Raising public investment to better align with international benchmarks while improving efficiency.** Governments should commit to gradually increasing budget allocations for childcare/ECEC as a share of GDP and of the education budget. A realistic target for pre-primary, for example, could be to reach 0.5% of GDP within 5 years (up from the current ~0.3%), moving toward the OECD average of

0.8%. This will require high-level acknowledgement that early childhood is as critical as other levels of education—a shift already starting under human capital agendas. Even within constrained budgets, prioritizing ECE yields high returns, so this rebalancing is justified. Governments can also leverage international funding. A strong economic case for ECE should be presented to finance ministries—evidence shows every dollar invested in quality preschool can return upwards of \$6–\$17 in long-term benefits (a result found in the US Perry Preschool study and echoed in other contexts). Finally, it is critical to assess whether there are efficiency improvements that could be made. For instance, countries could look to bundle procurement of learning materials or playground equipment at a national level to lower unit costs with bulk orders, freeing resources for other needs.

2. Adopting innovative financing mechanisms to expand resources for childcare.

In addition to traditional budgeting, consider new financing approaches such as social impact funds or public–private investment funds for ECD to help pool funds from government, international partners, foundations, and possibly corporate social responsibility contributions into a dedicated ECEC expansion fund. Similarly, municipal incentives that introduce matching grants where the central government matches or multiplies municipal spending on new childcare projects, to encourage local investment, could be used. Similarly, there is also space for cost-sharing with parents on a sliding scale to ensure the system recovers some costs from higher-income users, freeing up public funds to subsidize the poor.

3. Ensuring affordability for families through fee policies and financial aid. No child should be excluded due to cost. Concretely, countries could consider caps on the fees that can be charged in public (and even private) childcare as a percentage of family income, following OECD practices. It will also be important to continue exploring mechanisms that give access to students to private options where public options are lacking, including voucher schemes.

Meeting goal 4: Establishing clear institutional frameworks and system coherence

The governance structure of childcare—i.e., which institutions are responsible for overseeing, providing, and regulating services—can have a big impact on how the system functions. In the Western Balkans, governance tends to be fragmented, with responsibilities sometimes split between different ministries and levels of government. International evidence consistently shows that fragmented ECEC governance structures hinder access and contribute to uneven quality. When responsibilities for financing, regulation, curriculum, and workforce development are dispersed across multiple ministries or agencies without strong coordination, systems face governance instability, inconsistent standards, and slower expansion of services. Research further indicates that complex or “split” governance models lead to gaps

in monitoring, weak implementation of quality frameworks, and inefficiencies that undermine cohesive service delivery and erode parental trust—ultimately limiting participation and equity (He et al., 2026; OECD, 2025c).

These findings underscore that governance fragmentation is a core structural constraint contributing to low enrollment and persistent quality disparities across countries in the region. Addressing these issues requires reforms that align governance frameworks, clarify institutional roles, and embed strong mechanisms for quality assurance and accountability. To achieve this, there is a push toward more coherent systems—whether that means unifying oversight under one ministry, or establishing strong inter-ministerial coordination bodies, and ensuring local levels have the capacity and accountability to deliver services.

The first objective is to improve coordination across ministries. The lack of a centralized coordinating body for ECEC is a recurring issue across the Western Balkans, particularly where responsibilities are shared across multiple ministries or administrative units. The challenge is even greater if the focus goes beyond education services to more holistically engage in early childhood development and consider health and labor market aspects, for example. The necessary links between the health and the education system are a priority here. It would also take a whole-of-government approach to optimize programs and policies to promote both child development and women's employment and ensure system coherence (taking into account other complementary policies such as child benefits and parental leave, or to implement clear policies on employer-supported childcare).

To address this, national governments should establish or strengthen dedicated ECEC coordination units that sit either within or across ministries and are in contact with all administrative levels. These units, in a broader context that incentivizes inter-sectoral collaboration, should be tasked with harmonizing policies between ministries and municipalities, ensuring inter-agency cooperation, particularly in data collection and sharing, monitoring implementation across levels of governance, and coordinating support for vulnerable children through early intervention and inclusive education. A starting point, in countries at this stage, is to recognize this multi-sector when preparing strategic documents. For example, in Kosovo, its ECE strategy aims to align efforts of education, health, and social sectors to operationalize the new law. Strengthening coordination also requires investing in data systems, as North Macedonia and Serbia have started to do. In due time, it would be desirable to designate a lead institutional anchor for childcare—either a single ministry or a high-level coordinating body—so that fragmentation is reduced. In OECD countries, for example, the ECEC for 0–6 is mostly found under ministries of education.

The second objective is to accompany the decentralization of service provision with adequate support. Decentralizing responsibility to municipalities (as seen in Albania, BIH, North Macedonia, Kosovo and Serbia to an extent) can bring services closer to communities, but it can also widen disparities if poorer municipalities cannot deliver. The decentralization model in Albania, and to a certain extent in Bosnia

and Herzegovina, has created a situation where local governments are responsible for ECEC delivery but often lack the capacity or funding to manage it effectively. Similarly, in BIH, legal alignment with the Framework Law on Preschool Education has been delayed, with some cantons still in the process of drafting and adopting laws more than a decade after the deadline. This raises the issue of how central governments ensure minimum standards and equitable access nationwide. In response, governments should clearly define institutional mandates and ensure adequate legal compliance, support lagging cantons or municipalities through additional financial support, technical assistance and capacity-building programs, introduce accountability mechanisms to track implementation at the local level, and strengthen the role of regional education offices to support municipalities with policy implementation, quality monitoring, and financial oversight.

Governance reforms should also include reforms to clarify the overall regulations as they apply to different parts of the sector. A clear example is in Albania. Including services for children aged 0–3 in the pre-university system would clarify responsibilities, enable integrated funding, and enhance delivery (World Bank 2025b).

Finally, it is important to buttress policy-making on a stronger evidence base. In the Western Balkans, the monitoring and evaluation (M&E) systems for childcare are in early stages of development. Data availability is improving (especially enrollment and input data), but quality metrics and child outcome data are still sparse. Despite progress, gaps remain in data coverage: Many private centers do not regularly report their data to authorities (and some authorities do not systematically request it). As of 2023, not all countries have reliable figures of children in private or NGO childcare, though this is improving with new licensing rules. Also, indicators on equity (like disaggregating enrollment by urban/rural, by ethnicity, by disability) have not been routinely available. Without such data, it is difficult to monitor inclusion. Some recent surveys and studies have filled those gaps, but these need to be institutionalized into official monitoring. Just as significant is the lack of data on quality and its accessibility to relevant stakeholders. This applies to both data coming from existing quality assurance mechanisms, like inspections, or child assessments.

Reform efforts are ongoing. For example, several countries are integrating preschool into education Management Information Systems (EMIS), allowing more systematic data capture. Serbia included preschools in its Unified Education Information System (called JISP), so now every child, including those in the pre-primary preparatory program, is assigned an ID and tracked. North Macedonia is developing a database for social services that includes ECEC participation and is working on linking education and social data to see, for instance, preschool participation by social assistance beneficiary status. Kosovo's new ECE law mandates creation of a central ECE database with data from all providers (public and private) and connected to the health and social protection systems, although work on this has not yet started. As discussed in the quality section, initial investments are also being made in children's assessments.

Strengthening ECEC data systems—including coverage, staffing, assessments, infrastructure, and finance— supports effective planning and monitoring locally and nationally. Data systems need to collect the right information and be able to exchange information between sectors to allow for immediate actions for children and family wellbeing. For example, information systems in each sector need to allow for interoperability and data reference. The capacity and systems then need to be strengthened to use these data systems to improve monitoring quality and efficiency, focusing on analysis and evaluation.

In short, the following steps could help strengthen governance and system coherence for ECEC in the region:

1. **Establishing clear institutional leadership and coordination for early childhood policy.** Each country should designate a lead ministry or agency with overarching responsibility for the childcare/ECEC sector and empower it with the mandate and resources to drive reforms. If feasible, consolidate 0–6 ECEC under one ministry. If full consolidation is not immediately possible, create a high-level inter-ministerial council on Early Childhood Development, chaired by a senior government official (e.g., Deputy Prime Minister or similar), that brings together Education, Social Protection, Health, and Finance to ensure policies and actions are coordinated. Roles between central and local governments also need to be better delineated, starting with updating legal frameworks to specify who is accountable for what.
2. **Improving multi-level governance by building capacity and accountability at the local level.** Since municipalities play a key role in service delivery, it is necessary to invest in strengthening their capacity to plan, implement, and monitor childcare services. This would benefit not only from training but also peer learning among municipalities by, for example, twinning a well-performing city with a lagging one to transfer knowledge on how to boost outreach, manage finances, etc. This could also be done at the center level. It would be useful to also set up a system of performance monitoring for municipalities, tracking key indicators and publishing these in a comparative format. This transparency can pinpoint where to focus support. Over time, the system could even incorporate minimal performance targets into municipal budgets to increase accountability—e.g., link some portion of central funding to achievement of agreed coverage or quality improvements (output-based transfers).
3. **Updating and enforcing regulatory frameworks to support diverse providers while maintaining quality control.** Governance must evolve to accommodate the diversity of actors present in ECE. This starts with modernizing licensing criteria for private and community-based childcare providers to be stringent on safety and quality, but not overly bureaucratic. Create simple guidelines and one-stop application processes so credible NGOs or private entities can quickly become licensed. Then, enforce registration: all existing unregistered daycare centers should be brought into the licensing net or closed if non-compliant. Launch a

time-bound campaign to license private providers under the new system (perhaps offering technical assistance to help them meet standards). Quality and efficiency could also improve if the monitoring of all providers (public, private, NGOs) is done under the same inspection regime. This should be complemented by reporting obligations so that private centers supply enrollment and quality data to authorities—tying license renewal to compliance with reporting.

4. **Enhancing inter-sectoral linkages, especially between childcare, health, and social protection services.** For a holistic approach, improve systems so that health services (like pediatricians or visiting nurses) actively promote and refer families to childcare and social protection programs collaborate with ECE. This process can then be supported by the development of data-sharing protocols between sectors. Over time, countries could consider integrated service delivery by, for example, co-locating child health and development services at preschool sites.

Meeting goal 5: Ensuring safe and stimulating environments with a well-supported workforce

IMPROVING QUALITY ASSURANCE MECHANISMS

For investment in ECE to improve learning, the pace of ECE expansion shouldn't outstrip the ability to maintain a basic standard of quality. High-quality ECE matters not just for children's outcomes but also for earning parents' confidence in external childcare—if parents worry about poor quality or safety, they might keep their children at home, even when places are available. Therefore, improving quality goes hand in hand with expanding access.

All countries now legally allow private childcare centers, but regulatory oversight is still developing. Often, the same ministry that runs public services also regulates private ones, which can lead to conflicts or lax enforcement if capacity is low. For example, Kosovo's new law establishes that all providers (public or private) must be licensed under unified standards, which is a good step, but now the ministry must develop the capacity to inspect and enforce those standards (previously, many private centers operated with little oversight from municipalities).

Priority should be given to investments that directly enhance children's learning. Bendini and Devecelli (2022) discuss in detail what this entails. Beyond promoting instruction in the mother tongue, research increasingly shows that successful interventions depend on aligning curricula, teaching methods, and teacher development (Pianta et al. 2017; Weiland et al. 2018). Children benefit most when classrooms encourage engaging interactions, provide safe and stimulating environments, and maintain reasonable ratios of children to teachers as well as manageable group sizes (von Suchodoletz et al. 2017; Yoshikawa et al. 2013). Importantly, effective strategies to improve classroom quality—such as strengthening the current early childhood education workforce, implementing age-appropriate teaching approaches, and ensuring safe

learning spaces— can be both affordable and straightforward. Bendini and Dervicelli (2022) highlight various proven methods adopted by low- and middle-income countries to gradually enhance quality while considering budget and capacity constraints.

To ensure the quality of ECEC services and avoid deterioration as services expand, the countries in the region need to implement clear, enforceable standards and regular monitoring to support accountability, improvement, and transparency. As the expansion of ECEC services gains momentum, regular and more frequent quality monitoring becomes essential to ensure that newly established or scaled-up services maintain the expected standards (OECD., 2017). Montenegro and Serbia do conduct inspections: in Serbia, a School Inspectorate covers preschools and can issue findings; Serbia also has introduced a self-evaluation requirement where each preschool institution must evaluate its own quality against set criteria, and then external evaluators review it periodically. North Macedonia's State Inspectorate for ECEC (under MLSP) is relatively new and still building capacity for regular visits. Kosovo has historically lacked a specific inspectorate for early education (the education inspectorate focused on schools), but the new law calls for expanded inspection to ECEC. Additionally, expanding the communication of inspection outcomes to the public can empower parents to make informed choices and create incentives for providers to improve service quality. Improving this inspection system requires significant capacity investments, not only to include the number and the breadth of inspections, but also to improve the quality, given the lack of specialization on ECEC among inspectors.

An effective quality framework also includes a transparent and incentivized rating system, as seen in North Carolina (United States). The state operates a five-star licensing system, managed by the North Carolina Rated License Assessment Project (NCRLAP), where ECEC providers are assessed based on quality indicators and awarded ratings from one to five stars. This model has proven effective in encouraging providers to improve service quality in order to achieve higher ratings and could be adapted to suit national ECEC policy contexts in the Western Balkans (OECD., 2017).

A foundational step toward improving quality is the institutionalization of national systems to regularly measure child outcomes and the quality of learning environments. This includes structural aspects, such as the physical environment, group characteristics, and caregiver qualifications, as well as process dimensions, including caregiver to child and child to child interactions, curriculum implementation, and the quality of daily routines. Without systematic measurement, meaningful assessment is not possible. Regular child outcome assessments and observational studies provide critical insights into teaching quality and pathways for improvement, and serve as a reference for policymakers aiming to strengthen access to quality ECEC and build effective ECEC workforces. Without such systems, poor quality ECEC may persist, with evidence showing that low quality provision can be ineffective or even harmful to children's development and safety (Avitabile et al., 2026 [forthcoming]).

Internal mechanisms for feedback —like parent satisfaction surveys, community scorecards, or even child feedback (for older preschoolers who can express

views)— are generally not institutionalized. Some ECE centers do engage parents, but a routine system of gathering user feedback is lacking.

Given implementation and capacity constraints, it is important to develop comprehensive and coherent quality standards, but to do so progressively, with clear minimum standards and progressive pathways to improve over time. A key dimension of quality assurance is the regulation of child–teacher and child–staff ratios—a key indicator of the level of individualized care and educational support children receive. In half of the countries in the region, this is not clearly regulated in the relevant law. This is also the case for maximum group sizes (see Annex 2: Childcare–relevant legislation in Western Balkans). Enforcing achievable standards (like maximum class sizes) should be a priority. Research shows that smaller ratios can improve the quality of educator–child interactions, increase engagement, and reduce disruptions. In OECD countries, the average is 15 children per teacher in pre–primary education, though the ideal number typically decreases for younger children, particularly those under the age of three. Regulating these ratios across the Western Balkans—focusing over time on the actual number of children per adult caregiver rather than merely classroom size, as is the case in most countries— can significantly enhance the overall quality of early learning environments.

A similar progressive approach can be followed with licensing and registration requirements for nonstate providers. Bendini and Devecelli (2022) make the case that to boost registration rates and support quality assurance, standards should remain achievable while keeping children safe and discuss the example of Jamaica’s Early Childhood Commission which requires centers to meet three key criteria for registration and provides ongoing guidance to improve quality over time.

Finally, it is also important to strengthen the capacity of governments to use the quality assurance system to improve planning and learning. In Australia, for example, centers must produce a quality improvement plan that includes a self–assessment against national standards and targets areas for development. In the Czech Republic, monitoring reports provide feedback on each setting’s performance, identifying strengths and weaknesses and offering targeted recommendations. Iceland goes a step further by requiring settings to produce a reform plan that outlines how they intend to address identified issues (OECD, 2021).

In the Western Balkans, countries need to continue to build on the investments they are making in data systems to more systematically inform policy decisions. For example, at a very basic level, governments in Kosovo, North Macedonia and Serbia have used better data to identify municipalities that are “hot spots” for low enrollments in ECEC or where there are supply constraints and have used these to inform investment plans. Beyond aggregate numbers, countries are starting to also be more deliberate about identifying gaps among particular socio–economic or ethnic groups. Kosovo’s childcare law, for example, plans to link with the social registry to target fee subsidies.

Finally, countries might find it useful to establish a clear, visible target for ECEC that can be used to focus attention and prioritize ECEC. Very few countries publish

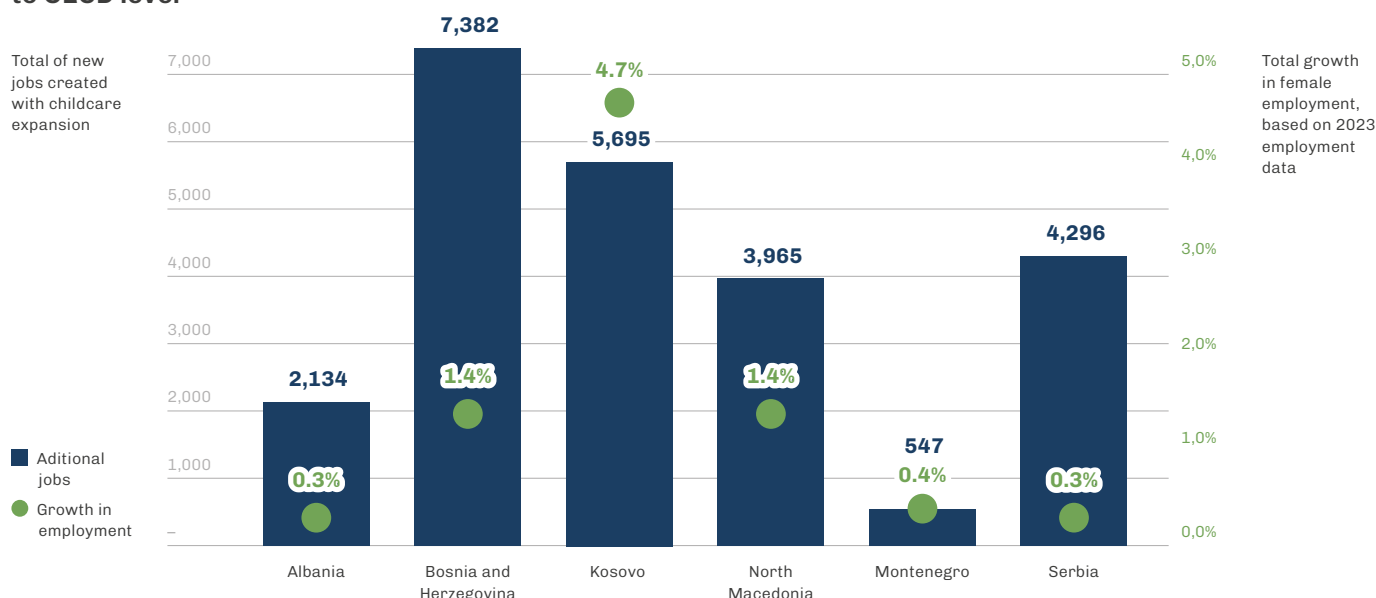
an annual report on ECE progress or have a dashboard accessible to stakeholders. The European Commission's regular reports often mention ECEC enrollment as an indicator, but, domestically, however, the profile of ECEC data is often lower. Establishing a clear target for ECE (like "increase preschool enrollment to X% by year Y"), which then can be monitored could be helpful as it can serve as an implicit accountability mechanism and can help concentrate minds and efforts on making progress on ECEC.⁸ Albania's National Education Strategy includes a target for pre-primary gross enrollment; Kosovo's Education Strategy does too. If prioritized and monitored publicly, this can be a good place to start for wider system reforms.

INCENTIVIZING PROFESSIONAL DEVELOPMENT AND GROWING THE ECEC SECTOR

To evaluate the potential of childcare expansion for Western Balkan countries, we rely on the recommended benchmarks of the OECD (which align with the EU). Taking it into account, we assume that Western Balkan ECEC enrollment would need to reach the OECD's benchmarks of 32 percent enrollment for children aged 0–3 and 86 percent for children aged 3–6. To achieve those levels, countries would need to expand their workforce substantially. Based on current children-to-teacher and support-staff-to-teacher ratios, our modelling demonstrates that achieving these enrollment goals would require the creation of approximately 9,400 new teaching positions and around 4,700 jobs for administrative and support staff in the Western Balkans, as illustrated in Table 4. Furthermore, aligning ECEC provision with OECD standards for children below 3 years old could result in the creation of approximately 6,600 new teaching positions and around 3,300 jobs for administrative and support staff, as illustrated in Table 5.

Because women currently make up most of the employees in ECEC (92% in North Macedonia to 99% in Kosovo), these roles are anticipated to be filled by women. The creation of these 24,000 jobs represents an increase of 1% in the female employment in the region, with larger increases in Kosovo (5%), Bosnia and Herzegovina (1.4%), and North Macedonia (1.4%), and smaller ones in Albania (0.3%), Montenegro (0.4%), and Serbia (0.3%) (Figure 18). In addition to the direct job creation effect, expanding ECEC coverage would also generate significant indirect labor market benefits for mothers. By enabling more parents, especially mothers, to enroll their children in ECEC, these policies would free up time and increase mothers' availability for paid work. Evidence from Uzbekistan shows that approximately 12 percent of mothers enter the labor force and employment once reliable childcare becomes available (Abdurazzakova et al., 2025).

8. Because ECD spans health, nutrition, and education, a holistic monitoring would consider indicators from multiple sectors (like % of children who received developmental screening, % in preschool, % with adequate nutrition, etc.), but to start, a single, simple indicator, could be useful.

Figure 18. Estimates of job creation and total female employment growth given a childcare expansion to OECD level

Source: Employment data taken from ILOSTAT (2025), estimates calculated by authors, see Tables 4 and 5.

Table 4. Estimates of staff expansion for children between 3 and compulsory education

COUNTRY	Number of children between 3 and 5 years old in 2023*	Current enrollment rate between 3 and 5 years old, and compulsory education in 2022**	Children already enrolled	Additional children to enroll to meet the OECD level of 86%	New teachers ***	Other ECEC staff ≈ ½ teacher head-count	TOTAL new jobs
Albania	≈90,000	79.5%	≈ 71,550	≈ 5,850	≈ 390	≈ 195	≈ 585
North Macedonia	≈61,000	46.1%	≈ 28,121	≈ 24,339	≈ 1,623	≈ 811	≈ 2,434
Montenegro	≈21,000	78.3%	≈ 16,443	≈ 1,617	≈ 108	≈ 54	≈ 162
Serbia	≈129,000	71.6%	≈ 92,364	≈ 18,576	≈ 1,872	≈ 936	≈ 2,808
Bosnia and Herzegovina	≈55,000	26.4%	≈ 14,520	≈ 32,780	≈ 3,233	≈ 1,617	≈ 4,850
Kosovo	≈42,000	18.4%	≈ 7,644	≈ 28,476	≈ 2,143	≈ 1,072	≈ 3,215
Total					≈ 9,369	≈ 4,684	≈ 14,053

*Children population estimates are taken from the UN (2024).

**Enrollment data for North Macedonia, Montenegro, and Serbia is taken from Eurostat and corresponds to 2023; data for Albania is taken from UNICEF (2025) for 2023 and reports gross ratio; data for BiH and Kosovo is calculated by taking the absolute number of children enrolled according to the Agency for Statistics of each country for 2023 and dividing by the total population of children in these groups using UN (2024) data.

***Calculated using mandated ratios and an average ratio of 1:15 when ratios are not available.

Table 5. Estimate of staff expansion for children between 0 and 3 years old

COUNTRY	Number of children between 0 and 2 years old*	Current enrollment rate between 0–3 years old**	Children already enrolled	Additional children to enroll to meet the OECD level of 32%	New teachers ***	Other ECEC staff $\approx \frac{1}{2}$ teacher head-count	TOTAL new jobs
Albania	$\approx 87,000$	21%	$\approx 18,545$	$\approx 9,295$	$\approx 1,033$	≈ 516	$\approx 1,549$
North Macedonia	$\approx 56,000$	16%	$\approx 8,736$	$\approx 9,184$	$\approx 1,020$	≈ 510	$\approx 1,531$
Montenegro	$\approx 21,000$	21%	$\approx 4,409$	$\approx 2,311$	≈ 257	≈ 128	≈ 385
Serbia	$\approx 186,000$	27%	$\approx 50,592$	$\approx 8,928$	≈ 992	≈ 496	$\approx 1,488$
Bosnia and Herzegovina	$\approx 76,000$	12%	$\approx 10,251$	$\approx 14,096$	$\approx 1,688$	≈ 844	$\approx 2,532$
Kosovo	$\approx 60,000$	7%	$\approx 4,320$	$\approx 14,880$	$\approx 1,653$	≈ 827	$\approx 2,480$
Total					$\approx 6,644$	$\approx 3,322$	$\approx 9,965$

*Children population estimates are taken from the UN (2024).

**Enrollment data for BiH, Kosovo, North Macedonia, and Serbia is calculated by taking the absolute number of children enrolled according to the Agency for Statistics of each country for 2023 and dividing by the total population of children in these groups using UN (2024) data. For Albania and Montenegro, where age-specific enrollment data are unavailable, 0–3 enrollment is imputed using the average 0–3/3–6 enrollment ratio observed across the remaining countries in the sample.

***Calculated using mandated ratios and an average ratio of 1:9 when ratios are not available or unclear how many teachers per group are required.

Given this evidence, governments in the Western Balkans should prioritize investment in ECEC staff not only to support children's development and school readiness, but also to advance broader economic and social objectives. Expanding and professionalizing the ECEC workforce in line with OECD standards would generate substantial employment, particularly for women, and contribute to higher female labor force participation both directly, through job creation, and indirectly, by easing care constraints for working parents. Beyond its educational benefits, investment in ECEC staff can therefore act as a catalyst for inclusive growth, women's economic empowerment, and the expansion of the care economy, delivering returns that extend well beyond the education sector.

IMPROVING QUALIFICATIONS, IN-SERVICE TRAINING, AND DEVELOPMENT OPPORTUNITIES FOR ECEC STAFF

Ensuring an adequate, stable, and well-qualified ECEC workforce is critical for long-term success and quality of services in the Western Balkans. Currently, while many ECEC staff hold tertiary qualifications, there is significant variation in educational requirements—particularly between educators working with those above three years old and those working with children under three years old in Albania, Kosovo, Serbia, and North Macedonia. This disparity not only reflects a broader

undervaluing of the care component in ECEC but can also contribute to inconsistent quality in service delivery. Establishing unified professional standards and minimum qualification requirements across ECEC settings, especially for those caring for younger children, would help bridge these gaps and promote a more cohesive and recognized profession (OECD, 2021).

Equally important are structured professional development opportunities that support all staff—regardless of educational background—to stay up to date with evolving pedagogical practices, classroom management, inclusive education, and curriculum requirements. Across the Western Balkans, systems for CPD and career advancement are beginning to take shape, though their implementation and impact vary significantly between and within countries, with only clear paths available in Montenegro and Serbia. North Macedonia is reforming its three Centers for Excellence to enhance their roles as model kindergartens and hubs for new teacher training modules. Authorities are also encouraging collaboration among ECEC institutions through peer learning, exchanges, communities of practice, and establishing supporting structures and guidelines (World Bank 2023). Similar initiatives are also expanding in Serbia, including the use of digital tools for training.

Beyond the Western Balkans, international examples provide further insight. In Luxembourg and Switzerland, professional development opportunities are increasingly tailored to staff needs through collaborative self-assessment processes and regular interactions with experts (OECD, 2021). These systems allow training to evolve in response to curriculum changes, emerging pedagogical priorities, and regional needs.

Furthermore, retention and motivation can be strengthened through both financial incentives and professional support. Short-term measures, such as offering location-based allowances, signing bonuses, or housing subsidies—particularly in rural and underserved areas—have proven effective in countries like Kazakhstan (OECD, 2017). These strategies can attract ECEC staff where they are most needed and improve service availability in regions experiencing high demand. Deeper reforms need to better align remuneration in ECE with similar fields. Some countries classify preschool teachers the same as primary teachers in the civil service, which helps (e.g., France pays *école maternelle* teachers on par with primary teachers—an OECD best practice). In the Western Balkans, there have been moves toward parity: Montenegro and Serbia now have unified pay scales for teachers across levels, though differences remain in supplements and promotion opportunities.

Finally, career progression pathways are key to long-term workforce sustainability. In several OECD countries, opportunities to move into leadership, policy, or specialized roles provide motivation for staying in the profession. In North Macedonia and Serbia, steps are already being taken to align local practices with such systems, although there remains room for further development. As seen in Finland and France, performance-based salary increases and promotions to higher leadership roles not only reward experienced staff but also affirm the importance of ECEC as a professional field (OECD, 2021). In OECD countries, the substantial difference

between starting and top salaries, nearly 60%, reinforces the potential for meaningful advancement and helps attract and retain qualified personnel (OECD, 2014).

Building a skilled, motivated, and stable ECEC workforce requires a combination of appropriate qualifications, competitive working conditions, targeted incentives, and ongoing professional development. By drawing lessons from both within and outside the region, Western Balkan countries can better position themselves to support workers, improve quality, and expand access to early childhood services sustainably.

In short, in order to improve quality assurance and workforce support, key actions will be needed across countries in the region, building on the progress that has been made in recent years:

1. **Developing and enforcing robust quality standards and monitoring systems across all childcare providers.** The goal should be to have updated quality assurance frameworks in place, covering inputs (infrastructure, materials), processes (pedagogy, interactions), and outcomes. The first step is to finalize and implement existing national quality standards/checklists. Many of these countries have standards, but they are not fully operational. In less developed systems, a place to start would be to develop simple inspection checklists from these standards and train inspectors to use them routinely, focusing especially on aspects observed to be weak. More resources will be needed to increase the frequency of inspections so that each center is visited at least once every 1–2 years and so that staff get trained on aspects specific to ECEC. Over time, countries could consider pairing inspections with mentor visits—not just punitive inspections, but an opportunity for inspectors or pedagogical advisors to coach staff on improvements. Quality assurance can also benefit from bottom-up accountability mechanisms, such as the introduction of quality rating or recognition systems published to encourage improvement and inform parents, and the engagement of parents in quality monitoring through mechanisms for parent feedback and grievance redress.
2. **Expanding the ECEC workforce through improved training, recruitment, and retention strategies.** The goal should be to ensure an adequate supply of well-trained, motivated, and equitably distributed ECEC professionals across all types of providers. The first step is to assess current workforce gaps in terms of numbers, qualifications, and geographic distribution, and to develop a national ECEC workforce strategy aligned with service expansion plans. Many countries face shortages of qualified staff, particularly in underserved areas, due to low wages, limited career progression, and insufficient training opportunities. To address this, countries should expand pre-service training capacity (e.g., through vocational schools, teacher training institutes, and accredited private providers). Furthermore, improving compensation, working conditions, and recognition of ECEC professionals will be critical to attract and retain staff. Targeted incentives

could be used to encourage recruitment in rural and low-income areas. Finally, mentoring and coaching systems, including peer learning networks and on-site pedagogical support, can help translate training into improved classroom practice and reduce turnover.

3. **Strengthening the ECEC workforce through improved professional development and career incentives.** The quality of childcare stands or falls with its workforce. Key recommendations:

1. Elevate qualification requirements with support: If not already, move towards requiring tertiary education (at least an appropriate 2–3 year degree) for lead preschool teachers across the region. But accompany this with transitional provisions and with measures to help current staff upgrade their credentials (scholarships, paid study leave, onsite training, bridging programs). At the same time, revise teacher training curricula in universities in consultation with international best practices.
2. Expand the resources dedicated to and availability of in-service training and mentoring, using blended learning and incentivizing peer learning when possible.
3. Professionalize and build career pathways. This could start by gradually aligning pay scales and status of at least preschool teachers with primary school teachers. Where this has not been done, it would be helpful to create realistic career ladders: e.g., positions like Senior Teacher, Preschool Principal, Early Childhood Mentor, etc., with corresponding promotion criteria and salary increments.
4. Recruit and train specialized staff for support roles: Increase the number of pedagogical coaches, inclusion specialists, and teaching assistants in the system. This can be an opportunity to bring in younger trainees or community members under supervision, which also helps with workforce shortages.
5. Foster a community of practice and recognition: Encourage networks like national preschool teacher associations. Host annual conferences or innovation fairs where educators can share best practices and be recognized for their work. Award excellence—e.g., a “Teacher of the Year” award for ECEC educators nationally—to raise the profile of the profession and incentivize quality.

3. **Modernizing the curriculum and learning materials to reflect best practices and future skills.** Nearly all Western Balkan countries have updated curricula in recent years and now the focus needs to be on implementation, including: providing ample, developmentally appropriate learning materials and play equipment to all centers, including those in remote or poor areas, maybe allocating a dedicated budget per child for learning materials; incorporating innovative content such as foundational STEM, creativity, and socio-emotional learning into daily activities; monitoring curriculum implementation quality—not in a heavy-handed way, but via the inspection/mentoring system. Create classroom observation tools for mentors/inspectors to systematically assess the quality of

interactions. Use these observations to feed back into coaching for teachers on improving instructional techniques.

4. **Strengthening monitoring and evaluation for continuous improvement.** In summary, for quality, track progress on quality indicators, institutionalize periodic evaluations of major initiatives, and engage in international assessments or benchmarking.

By implementing these recommendations, Western Balkan countries can make significant strides toward a childcare system that is accessible to all, adequately financed, well-governed, high-quality, and ultimately beneficial to children, families, and society at large. The experience of OECD countries and of the Balkans itself underscores that such improvements are feasible and yield substantial returns from higher human capital to greater gender equality, jobs, and economic growth.

6. Conclusions

Now is an opportune moment for the Western Balkans to scale up investment and reform in childcare. With supportive demographic trends and strong backing from international partners, governments can act boldly on this agenda. As recognized in the Growth Plans of the EU for the Western Balkans, ECEC plays a foundational role in shaping lifelong learning trajectories, promoting equitable development, and supporting inclusive economic and social growth. As discussed in this report, investment in quality ECEC services leads not only to improved cognitive and socio-emotional outcomes for children but also contributes to increased labor force participation—particularly for women—as well as long-term national economic development through job creation and a more skilled and productive workforce. Expanding ECEC in the Western Balkans could create over 24,000 new jobs, mostly for women.

Despite the clear economic and developmental benefits of ECEC, provision within the Western Balkans remains uneven, insufficient in many areas, and often inaccessible to the most vulnerable populations. Enrollment averages about 51% for children aged 3 to school entry, but is much lower for under-threes. While Serbia, Montenegro, and Albania have made notable improvements in enrollment (especially for the pre-primary year), Kosovo, North Macedonia, and BIH still face the core challenge of scaling up their childcare systems so that a majority—not a minority—of children can participate. Urban-rural and ethnic disparities are significant, with marginalized groups like Roma and children with disabilities underrepresented. There are also important gaps and inequalities in terms of the quality of provision. Overall, financing remains too limited, and institutional capacity, particularly at the local level, needs to be strengthened. In addition, parental preferences indicate the need to address demand-side constraints such as cultural norms, affordability, and trust in the ECEC system.

The region has made some progress in recent years in expanding public provision, developing private sector engagement, and implementing policy reforms aimed at inclusion and system efficiency. In Kosovo, North Macedonia, and Serbia, for example, governments have constructed and renovated ECEC facilities. Public–Private Partnerships have emerged as a viable mechanism for expanding services, particularly where financial incentives, subsidies, and professional development opportunities for private sector staff are in place.

However, broader systemic challenges persist. Western Balkan countries spend too little public money on childcare to ensure broad access and quality. The financing burden falls disproportionately on local authorities and families, leading to unequal service provision and many children being priced out of enrollment. Strengthening the financial foundation of the childcare system —via higher government allocations, smarter subsidies, and engaging additional funding sources— is imperative for any substantial improvement in access and outcomes.

In many countries, the lack of robust governance structures continues to hinder coherent policy implementation, especially where responsibilities are fragmented across multiple ministries and local levels, as seen in Albania and Bosnia and Herzegovina. Quality assurance systems are often underdeveloped or inconsistently applied, and professional development and career advancement opportunities for ECEC workers remain limited, contributing to challenges in recruitment and retention.

To build a more inclusive, equitable, and high-performing ECEC system across the Western Balkans, governments must act on multiple fronts. First, public investment in ECEC must increase significantly, with a clear focus on equitable access, affordability for the vulnerable, and long-term sustainability. This includes not only increasing the total education budget but also ensuring a greater allocation for early childhood services, especially for children aged 0–3. The use of resources needs to be based on a stronger data and monitoring system and better aligned with the goals of the system, giving priority in public spending to the most vulnerable.

Second, the provision of ECEC must be expanded, especially in rural and marginalized areas, through a mix of government infrastructure investment and support for private providers. At the same time, demand-side barriers must be addressed through targeted communication campaigns, engagement with fathers and extended families, and the promotion of ECEC as a valuable and accessible resource that provides long-term benefits.

Third, establishing unified, enforceable quality standards and robust monitoring systems will help ensure consistent, high-quality early childhood services nationwide. This includes standardizing curriculum and child assessment tools, regulating child-to-educator ratios, and building a more professionalized and motivated ECEC workforce through improved wages, recognition, and training.

Finally, the institutional and governance environment must be strengthened to support cross-sectoral coordination, transparency, and accountability. Establishing central ECEC coordination units, streamlining decentralized responsibilities, and

improving data systems for decision-making are essential steps toward ensuring that policy intentions translate into real outcomes on the ground.

While many fundamentals of the childcare system need strengthening, countries in the Western Balkans are experimenting with new approaches to overcome constraints: new service models (mobile, community, employer-based) to expand reach; partnerships and incentives to mobilize non-government resources; modern pedagogies and inclusion techniques to improve quality and equity; technology for training and parent engagement; more data-driven management for better decision making. These innovations are gradually transforming the landscape of childcare. The challenge is to take successful pilots to scale and ensure that innovative practices become standard practices. In this report, we have discussed how governments can foster and institutionalize such innovations—for example, by adjusting regulations to accommodate flexible models, providing funding streams for alternative providers, and learning systematically from pilot experiences.

In sum, transforming childcare in the Western Balkans will require a gradual, phased process while maintaining a sense of urgency. Countries have ECEC systems at different levels of maturity, but new reforms and investments can follow a natural progression that ensures expansion with quality, particularly for the most vulnerable. In the short term, establishing coordination bodies and launching programs in underserved areas can lay the groundwork for more equitable access and improved governance. Investments and reforms that focus on quality and assessments to help identify progress and gaps are important here as well. Medium-term goals should focus on increasing public spending and developing inclusive curricula, ensuring that resources and educational content reach all children, especially those from marginalized groups. The long-term vision is to achieve universal access to quality childcare through integrated, sustainable systems that are well-financed, inclusive, and governed by coherent policies. This strategic progression—from immediate coordination and pilots, through expanded investment and curriculum reform, to a comprehensive, universally accessible system—will help realize the region's potential for inclusive human capital development and social progress.

7.

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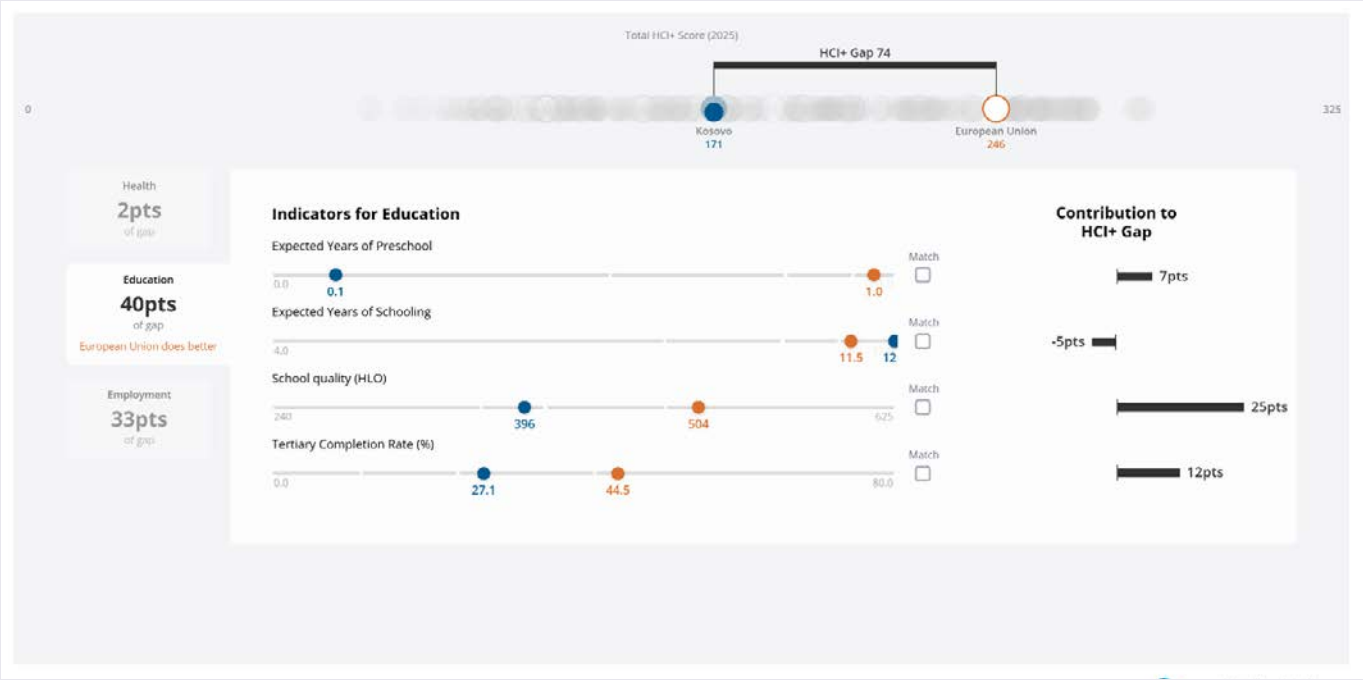
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Annexes

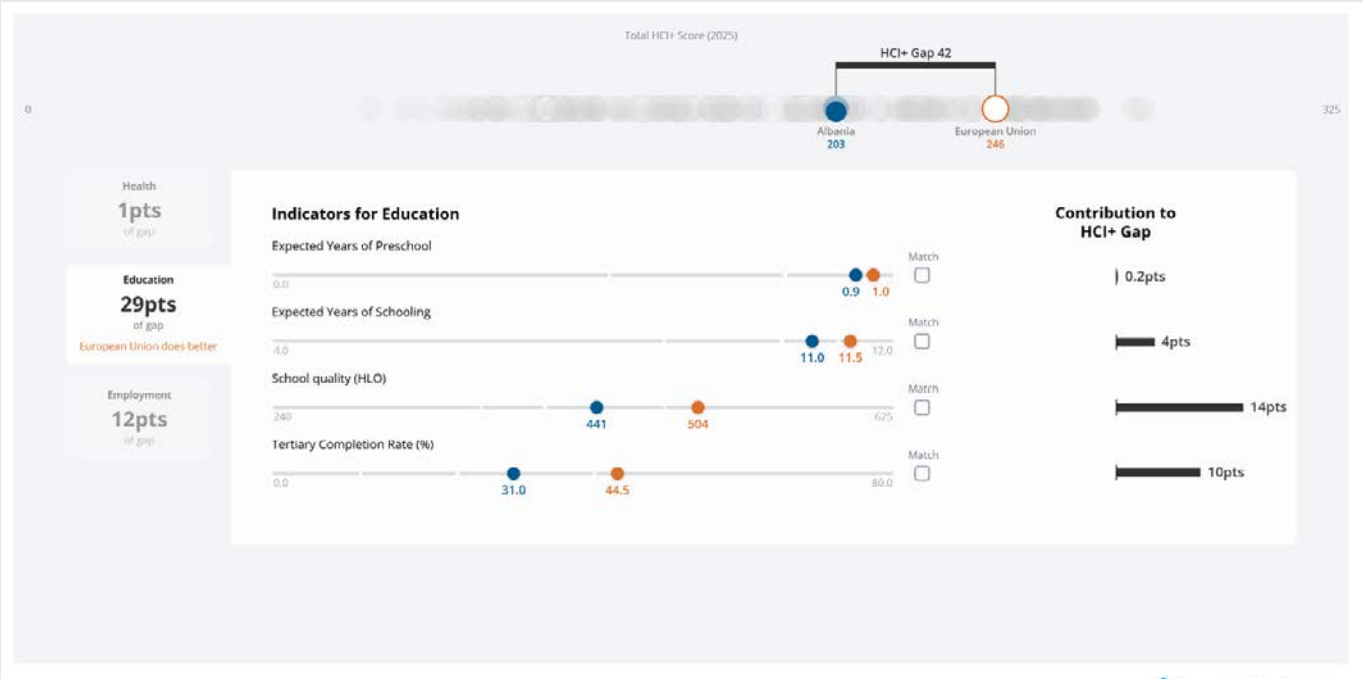
Annex 1. HCI+ for Western Balkan Countries and EU

Figure A1. Lifetime Human Capital Index (2025) and GDP Per Capita (2025).
Kosovo's LHCI compared to European Union



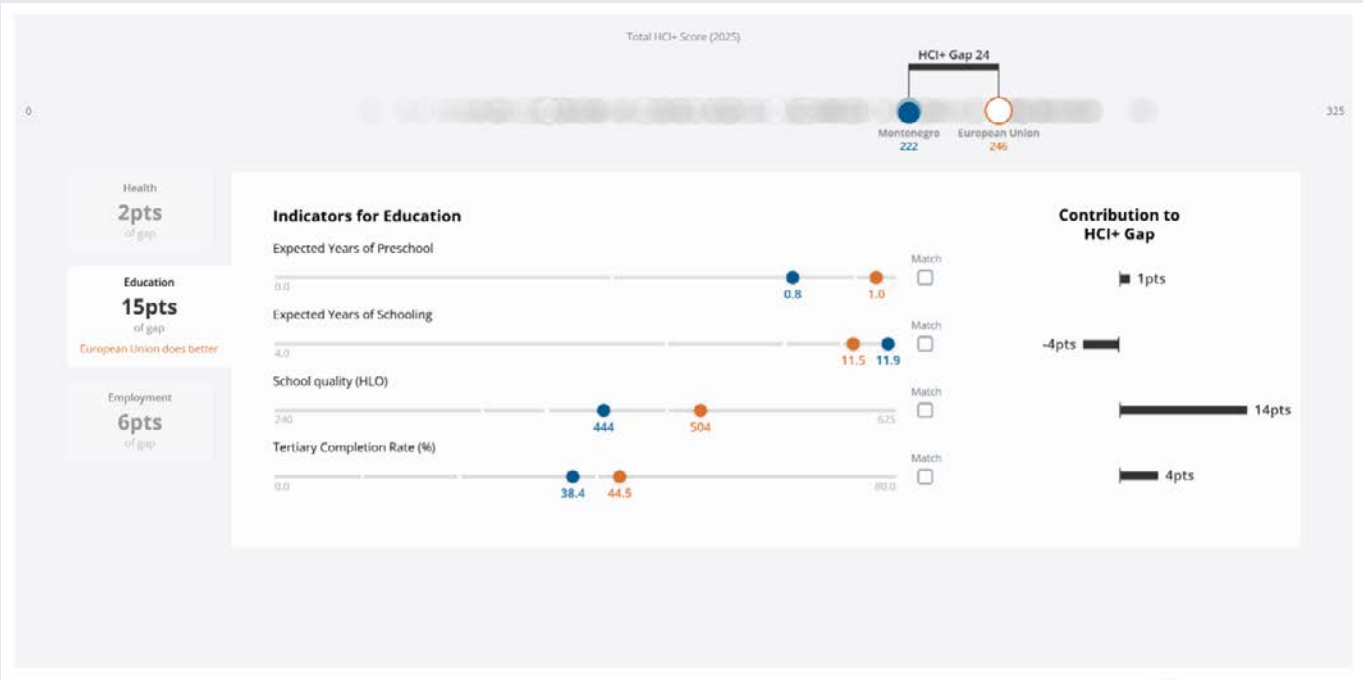
Source: World Bank Indicators.

**Figure A2. Lifetime Human Capital Index (2025) and GDP Per Capita (2025).
Albania’s LHCI compared to European Union**



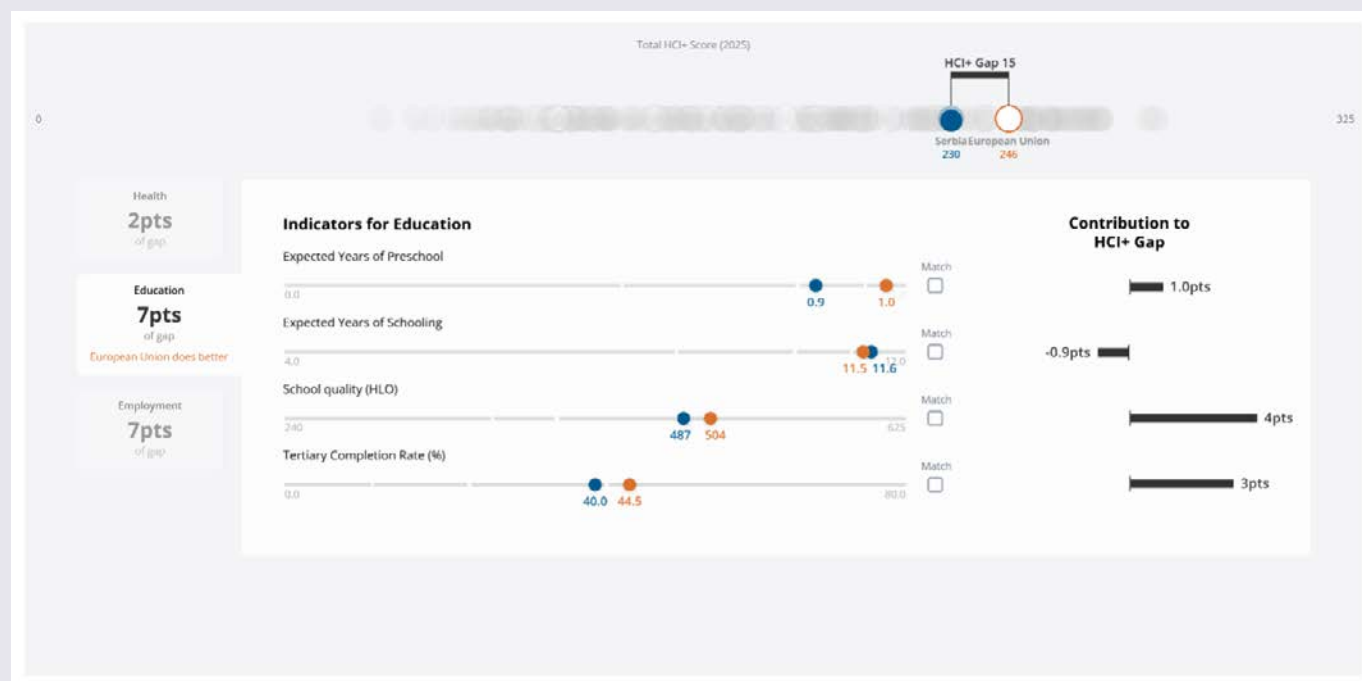
Source: World Bank Indicators.

**Figure A3. Lifetime Human Capital Index (2025) and GDP Per Capita (2025).
Montenegro’s LHCI compared to European Union**



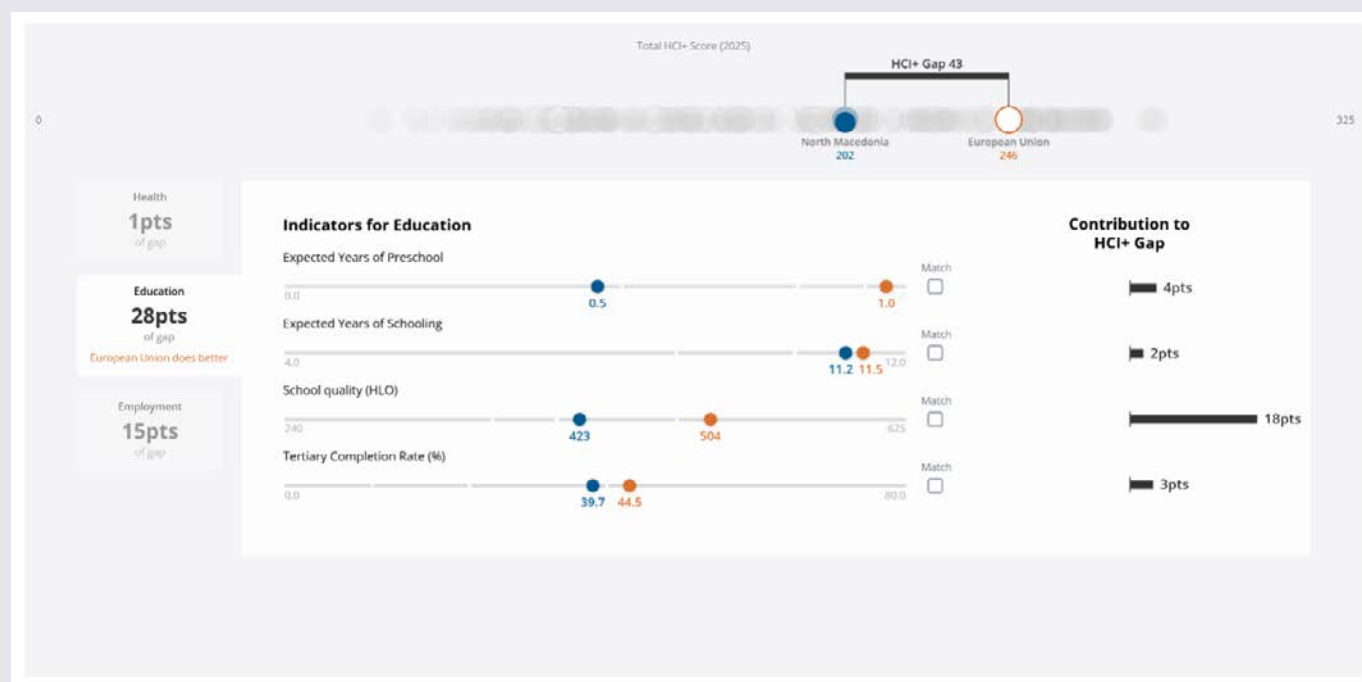
Source: World Bank Indicators.

**Figure A4. Lifetime Human Capital Index (2025) and GDP Per Capita (2025).
Serbia's LHCI compared to European Union**



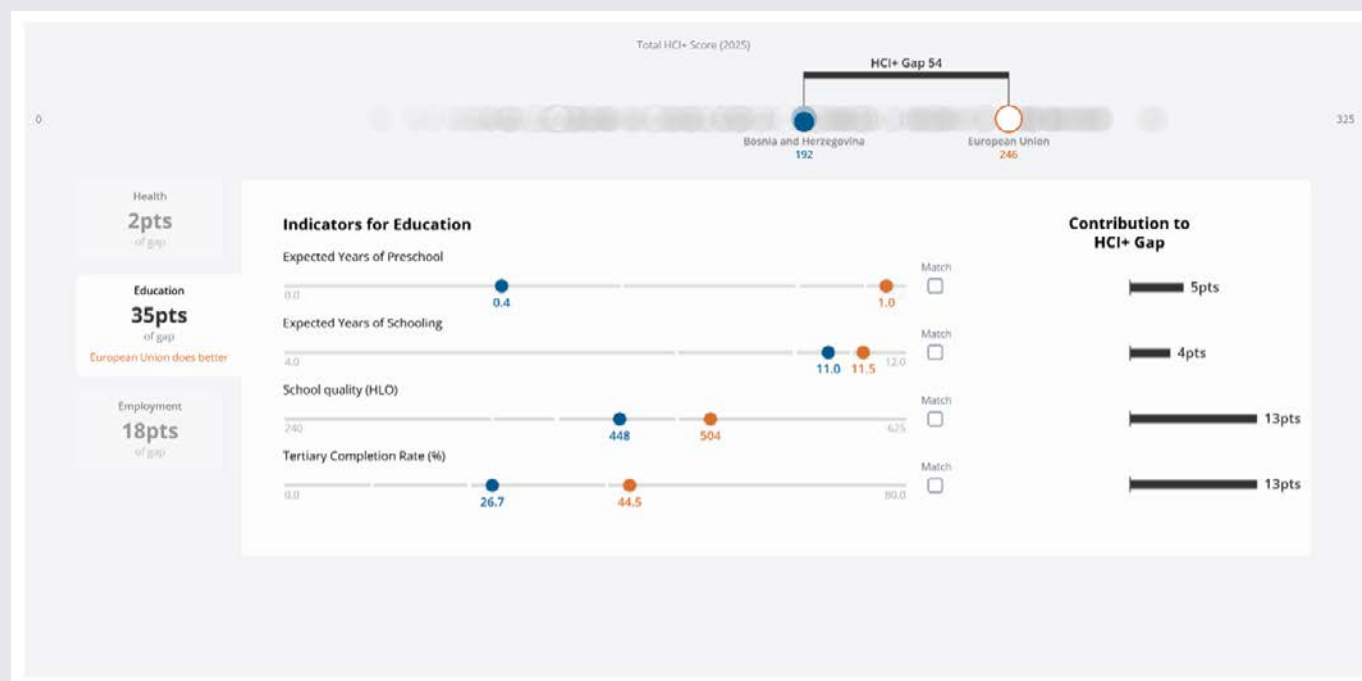
Source: World Bank Indicators.

**Figure A5. Lifetime Human Capital Index (2025) and GDP Per Capita (2025).
North Macedonia's LHCI compared to European Union**



Source: World Bank Indicators.

**Figure A6. Lifetime Human Capital Index (2025) and GDP Per Capita (2025).
Bosnia and Herzegovina's LHCI compared to European Union**



Source: World Bank Indicators.

Annex 2. Childcare–relevant legislation in Western Balkans

AVAILABILITY	Albania	Bosnia and Herzegovina	Kosovo	Montenegro	North Macedonia	Serbia
Does the law regulate public provision of childcare services?	Yes, the law in Albania regulates public provision of childcare services in various ways.	Yes, in the Law on Preschool Education in Bosnia and Herzegovina	Yes, in the law on Early Childhood Education	Yes, in the Law on Preschool Education nr.40/11	Yes, in the Law on Child Protection Official Gazette of the Republic of Macedonia, No. 164/17	Yes, in the Law on Preschool Education nr.129/2021 regulates the provision of childcare services
Does the law regulate private provision of childcare services?	Yes, within the Law on Social Care Services No. 121/2016.	Yes, in the Law on Preschool Education in Bosnia and Herzegovina	Yes, in the law on Early Childhood Education	Yes, in the Law on Preschool Education nr.40/11	Yes, in the Law on Child Protection Official Gazette of the Republic of Macedonia, No. 164/17	Yes. The Law on Preschool Education nr.129/2021, article 10 regulates the provision of private childcare services.



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AVAILABILITY	Albania	Bosnia and Herzegovina	Kosovo	Montenegro	North Macedonia	Serbia
Does the law mandate employers to provide/support childcare services?	No.	No.		No.	According to the Law on Labor Relations, employers in North Macedonia are obliged to provide or support childcare services for their employees who have children up to six years of age. This obligation applies to both public and private sector employers, regardless of the size or type of their business. Employers can fulfil this obligation by either establishing their own childcare facilities, subsidizing the costs of external childcare services, or granting flexible working hours to the parents.	No.
Does the law provide flexible hours at public childcare centers?	No.	No.	Yes. Programs in Early Childhood Education institutions are full-time and part-time programs; (Article 14.1)	Yes. Article 16 of the Law allows flexible hours of public childcare centers		Article 27 of the Law allows flexible hours at public daycare centers
Does the law provide for flexible hours at private childcare centers?	No.	No.	Programs in Early Childhood Education institutions are full-time and part-time programs; (Article 14.1)	Yes. Article 16 of the Law allows flexible hours of private childcare centers	No.	Article 27 of the Law allows flexible hours at private daycare centers
Does the law mandate min. operation hours at public childcare centers?	No.	No info	This matter will be regulated with bylaws since the law has been recently approved.	Yes. Article 14 of the Law allows flexible hours of public childcare centers	No info	Article 27 of the Law considers 4 hours –part time, minimum operation hours at public daycare centers.
Does the law mandate min. operation hours at private childcare centers?	No.	No.	This matter will be regulated with bylaws since the law has been recently approved.	The Law doesn't mandate the min. operation hours at private childcare centers	According to the Law on Child Protection of North Macedonia, private childcare centers are required to operate at least 8 hours per day, from Monday to Friday	Article 27 of the Law considers 4 hours –part time, minimum operation hours at public daycare centers.
Is there paid parental leave?	Yes. According to the Albanian Labor Code, employees are entitled to 365 days of paid maternity leave. 35 days should be taken before the expected due date, and a minimum of 63 days must be taken after.	Yes. According to the Law on Paid Leave, parents of children up to 10 years old can take up to 7 days of paid leave per year if both parents are working. Additionally, mothers are entitled to one year of maternity leave, which can be partially transferred to fathers in some cases.	Yes. According to the Law on Labor No.03/L –212 article 49.1 an employed woman is entitled to twelve (12) months of maternity leave.	Yes. Law on Labor (Article 126) allows 98 days of paid maternal leave.	Yes, mothers are entitled to nine months of paid maternity leave, which can be extended to 12 months for multiple births.	Yes. Law on Labor (Article 94) allows 365 days of paid maternal leave.

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AVAILABILITY	Albania	Bosnia and Herzegovina	Kosovo	Montenegro	North Macedonia	Serbia
Is there paid leave available to fathers?	Yes	According to the Labor Law in, there is no paid leave available to fathers. The only exception is if the mother dies or abandons the child, in which case the father can take over the maternity leave of 365 days.	Yes. According to the Law on Labor article 39: 1.3. allows three (3) days for the birth of a child;	Yes, the Law on Labor (Article 127) allows parental leave, without specifying the number of days.	According to the Labor Law, fathers are entitled to 15 days of paid leave after the birth of their child. This leave can be used within the first six months of the child's life.	Law on Labor (Article 94) allows fathers paid leave after a child is born only in case when mother is not employed
Is paid leave of at least 14 weeks available to mothers?	Yes. According to Albanian Social Security Law, mothers are entitled to paid leave for 365 days.	Yes. According to the Labor Law, pregnant female employees are entitled to one year of fully paid maternity leave, which starts 28 days before the expected date of birth. However, they are required by law to take at least 42 days of leave after childbirth.	Yes. According to the Law on Labor No.03/L –212 article 49.1: An employed woman is entitled to twelve (12) months of maternity leave.	Yes. Law on Labor (Article 126) allows 14 weeks (98 days) of paid maternal leave	According to the Leave Laws & Holidays, an employee is entitled to 9 months of paid maternity leave.	Yes. Law on Labor (Article 94) allows 365 days of paid maternal leave
How many days do fathers have?	No info	No info	Yes. According to the Law on Labor article 39: 1.3. allows three (3) days for the birth of a child	Not specified	Fathers are entitled to 10 days of paid paternity leave for the birth of a child.	Not specified in the law apart from the case when the mother isn't employed
What is the percentage of wage they receive during parental leave?	The leave is compensated at 80 percent of their wages for the first 150 days and 50 percent for the remaining days.	It depends on the administrative entity. In the Federation of BiH, the amount of cash benefit is 40% of the average net salary. In the Republika Srpska, the amount of cash benefit is 31% of the average net salary paid in the previous year. In Brcko District, the amount of cash benefit is 50% of the average net salary paid in Bosnia and Herzegovina in the previous year.	According to the Law on Labor article 49.3: First six months of maternity leave, the payment shall be equal to seventy percent (70%) of basic salary.	The Law doesn't specify the percentage of wage received during Maternal leave	Employees who take parental leave receive 7.5% of their gross wage as a mandatory benefit. This is part of the pension insurance system that covers both maternity and paternity leave.	The Law doesn't specify the percentage of wage received during a parental leave
Does the government allocate specific funds to address the needs of vulnerable children?	Not specified in the law.	No info	Issues related to allocation of funds and other matters will be regulated with bylaws as the law has been approved recently.	There are several laws addressing this issue: Law on the Education of Children with Special Educational Needs 145/21, Rulebook on the Method, Conditions and Procedure of Guidance of Children with Special Educational Needs 60/19), Inclusive Education Strategy (2019–2025)	No info	Allocation of fund to address the needs of vulnerable children are suggested by different documents, i.e. Strategy for improving the position of Roma in the Republic of Serbia, Strategy for Reduction of Poverty in Serbia



AVAILABILITY	Albania	Bosnia and Herzegovina	Kosovo	Montenegro	North Macedonia	Serbia
Does the government allocate specific funds to address the needs of children from marginalized communities?		No info	Issues related to allocation of funds and other matters will be regulated with bylaws as the law has been approved recently.	There are several laws addressing this issue: Law on the Education of Children with Special Educational Needs 145/21, Rulebook on the Method, Conditions and Procedure of Guidance of Children with Special Educational Needs 60/19), Inclusive Education Strategy (2019–2025)	No info	Allocation of funds for these groups are suggested by different documents, i.e. Strategy for improving the position of Roma in the Republic of Serbia, Strategy for Reduction of Poverty in Serbia
Are children of vulnerable and marginalized communities provided with access to social and healthcare assistance?	No info	The government has adopted several policies and strategies to address these issues, such as the Strategy for Social Protection 2018–2021, the Strategy for Health Sector Reform 2016–2025, and the Action Plan for Children 2015–2018.	Yes. Law no. 05/I–021 on Protection from Discrimination provides access to social and healthcare assistance for anyone.	There are several laws addressing this issue: Law on the Education of Children with Special Educational Needs 145/21, Rulebook on the Method, Conditions and Procedure of Guidance of Children with Special Educational Needs 60/19), Inclusive Education Strategy (2019–2025)	No info	Yes, there are.
ACCESSIBILITY	Albania	Bosnia and Herzegovina	Kosovo	Montenegro	North Macedonia	Serbia
Does the law guarantee a universal place to preschool education for all children? If yes, at what age?	No. According to the law on pre–university education, pre–school education is not obligatory for all children, but it is offered in public and private institutions for children aged 0 to 5 years old.	No. According to the Law on Preschool Education, Article 19: From the point of view of the form of organization, preschool upbringing, and education is carried out in crèches for children from six months to the third year of age and in kindergarten from the third year of age until they start elementary school	Yes, the new Law provides universal ECEC for children from 5–6 years	The law on Preschool Education does not consider obligatory institutionalized preschool education.		There is mandatory pre–primary education for children between 5 and 6 years old.
Are there eligibility criteria to benefit full preschool education and care, e.g. both parents being employed?	Preschool education and care are available for all children aged 0 to 6 years, regardless of their parent's employment status.	Yes. According to the Law on Preschool Education, there are some eligibility criteria to benefit from full preschool education and care. One of the main criteria is that both parents must be employed or actively seeking employment.	No. Preschool education and care are available for all children, regardless of their parent's employment status.	No. Preschool education and care are available for all children, regardless of their parent's employment status.	No, full preschool education and care is available for all children aged 3 to 6, regardless of their parents' employment status. However, priority is given to children from vulnerable groups, such as those with disabilities, Roma children, or children from rural areas.	No. Preschool education and care are available for all children, regardless of their parent's employment status.





ACCESSIBILITY	Albania	Bosnia and Herzegovina	Kosovo	Montenegro	North Macedonia	Serbia
What is the earlier age to benefit from preschool education and care?	Preschool education begins at 0 years old.	Yes, according to the Law on Preschool Education, Article 19: preschool upbringing, and education is carried out in crèches for children from six months.	Preschool education starts at 9 months.	Preschool education starts at 9 months. Law on Preschool education article 5	ECEC covers children from birth until the age of 6. However, most children start attending preschool when they are 8–9 months old.	According to the Law on PE, Article 30, preschool education and care can start from the age of 6 months until first grade of elementary.
What is the earliest age for pre-primary school starting?	Preschool education begins around the age of 5 years old.	Pre-primary if for ages 5–6.	Preprimary education begins from the age of 5. Article 18.1 Law on Early childhood education	Age 5 (Article 8) Law on Preschool education		Age 5
Is preschool education compulsory? If yes, from what year?	Pre-school education is not mandatory	Pre-school education is not mandatory but pre-primary for ages 5–6 is mandatory, but not in all administrative authorities.	No. Preschool education is not mandatory, but pre-primary education is according to the new Law.	Preschool education is not compulsory according to the Law on Preschool Education	Pre-school education is not mandatory	Preschool education is not compulsory according to the Law, but pre-primary education is mandatory

AFFORDABILITY	Albania	Bosnia and Herzegovina	Kosovo	Montenegro	North Macedonia	Serbia
What is the monthly fee per child per month at public kindergarten?	Yes. Law No. 69/2012 on the Pre-University Education System, which was amended by Law No. 80/2015 determined by the local government units, based on the criteria and standards set by the Ministry of Education, Sport and Youth. The fee cannot exceed 10% of the minimum wage in Albania.	Yes. Law on Preschool Education stipulates that the fee is determined by the local authorities based on the economic and social situation of the parents, the number of children in the family, and the quality of the educational program. The law also sets the minimum and maximum amount of the fee, which can vary from 10 to 50 percent of the average net salary in the respective municipality.	According to the Administrative Instruction on inclusion of children in preschool education 03/2022, the monthly fee is determined by municipal authorities based on family incomes	The Ministry of Education decides annually on the monthly fee for public childcare centers (article 35,36, Law on Preschool education).	Yes. According to the Law on Preschool Education, the fee is determined by the local self-government units, based on the average net salary in the country and the number of children in the family. The fee cannot exceed 10% of the average net salary for one child, 15% for two children, and 20% for three or more children.	The law doesn't regulate the monthly fee for public childcare
What is the monthly fee per child per month at private and community-based kindergarten?	Not regulated and variable	Not regulated and variable	This is not regulated.	The fees are regulated by Ministry of Education according to the Law	The fee is determined by the local self-government units, based on the criteria of the Ministry of Education and Science. The fee cannot exceed 20% of the average net salary in the country	The law doesn't regulate the monthly fee for private childcare



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AFFORDABILITY	Albania	Bosnia and Herzegovina	Kosovo	Montenegro	North Macedonia	Serbia
Does the law establish free provision of childcare services?	Providing childcare services is not free.	The Law on Preschool Education does not guarantee the free provision of childcare services for all children.	Only for vulnerable groups.	The law doesn't establish free provision of childcare services.	The law does not establish free provision of childcare services.	The law doesn't establish free provision of childcare services.
Does public provision of childcare services cover meals?	Not specified. Some public ECEC providers may offer subsidized or free meals for children from vulnerable families, such as Roma children.	The meal cover depends on the type of institution and the location. Some public pre-schools provide free meals for all children, while others charge a fee as part of the overall fee.	Preschool institutions provide meals to children during their stay at institutions. The monthly fee paid by parents/guardians covers meals as well.	Preschool institutions provide meals to children during their stay at institutions. The monthly fee paid by parents/guardians covers meals as well.	There is no universal provision for meals in public preschool institutions.	Yes. Preschool institutions provide meals to children during their stay at institutions.
Does the government provide financial support to parents for childcare?	In some cases, exemption from kindergarten and nurseries fees is provided for Roma families, but at local level.	The government provides some forms financial support to parents for childcare, but these vary depending on the entity and the type of care	No, with exception of the voucher programs	No. However the government provides child allowance		No. However, the government provides child allowance
Does the law have reserved capacity quotas for children from low-income families?	No. The legislation does not have a reserved quota for children with low-income families.	No. The law on education doesn't regulate this matter.	No. The legislation does not have a reserved quota for children with low-income families.	No. The law on education doesn't regulate this matter.	Yes, according to the Law on Preschool, there is a provision for reserved capacity quotas for children from low-income families. At least 10% of the total capacity of each preschool should be reserved for socially vulnerable children	No. The law on education doesn't regulate this matter
Does the law provide exemption from fees for children from low-income families?	Low-income families are eligible for financial assistance to cover the costs of childcare services.	According to the Law in Preschool Education Article 16 of the law, children from low-income families are entitled to a full or partial exemption from fees for childcare services.	Yes. The Administrative Instruction nr. 03/2022 provides exemption from fees for children from low-income families. The fees are paid by local authorities.	No, but the government will pay their childcare services through the centers for social care	The law stipulates that children from low-income families are entitled to free or subsidized childcare services.	Yes. Social assistance is provided through the social care centers. Also, the Law on Education article 34.
Do parents receive tax benefits for using childcare services?	No	No	No	No	No	No





AFFORDABILITY	Albania	Bosnia and Herzegovina	Kosovo	Montenegro	North Macedonia	Serbia
Does the government provide private childcare with financial support?	No	No	The government doesn't provide financial support for private childcare. However, in places or communities where no public childcare exists the local authorities can establish a community –based kindergarten which is a private–public cooperation.	No	No	No
Do private childcare centers receive tax benefits?	No	No	No	No	No	No
Does providing childcare for employees result in support for employees? For example, support in form of tax benefits?	No	No	No	No	No	No
QUALITY	Albania	Bosnia and Herzegovina	Kosovo	Montenegro	North Macedonia	Serbia
Does the country have a system for quality assurance in preschool education?	The system for quality assurance in preschool education is based on a set of standards and indicators.	The country has been implementing a system for quality assurance in preschool education since 2016.	No. currently there is no system for quality assurance in preschool education.	No	The system for quality assurance is based on the National Standards for Preschool Education and the Preschool Education Curriculum Framework.	No
Is there any evaluation of the process quality in the kindergartens?	No. Currently there is no system for process quality evaluation in preschool education.	There is no official evaluation of the process quality in the kindergartens.	No. Currently there is no system for quality assurance in preschool education.	No. Currently there is no system for quality assurance in preschool education.	There is no official evaluation of the process quality.	No. Currently there is no system for quality assurance in preschool education.
Are public childcare centers required to obtain licenses/ accreditations?	No.	Yes, public childcare centers are required to obtain licenses/ accreditations from the relevant authorities.	No.	No.	No.	No.





QUALITY	Albania	Bosnia and Herzegovina	Kosovo	Montenegro	North Macedonia	Serbia
Are private childcare centers required to obtain licenses/accreditations?	Yes, private childcare centers are required to obtain licenses from the local governance units or the Ministry of Education and Sports, and local governance units.	Private childcare centers are required to obtain licenses from the cantonal ministries of education, while in Republika Srpska, they are required to obtain accreditations from the Ministry of Health and Social Welfare.	Yes. Private childcare centers are required to obtain licenses.	Yes. Through the National Council on Education	Private childcare centers are required to obtain licenses/accreditations from the Ministry of Education and Science.	Yes. Private childcare centers are required to obtain licenses.
Does the law mandate a teacher-to-child ratio for public childcare?	No.	No.	Yes. Article 5 of the Administrative Instruction nr.03/2022 provides criteria for teacher-to-child ratio.	Yes. Article 24 of the Law on Education mandates a teacher-to-child ratio for public childcare.	No.	Yes. Article 30 of the Law on Education mandates a teacher-to-child ratio for public childcare.
Does the law mandate a teacher-to-child ratio for private childcare?	No	No	Yes. Article 5 of the Administrative Instruction nr.03/2022 provides criteria for teacher-to-child ratio.	Yes. Article 24 of the Law on Education mandates a teacher-to-child ratio for private childcare.	No	Yes. Article 30 of the Law on Education mandates a teacher-to-child ratio for private childcare.
Does the law mandate a max. group size at public childcare centers?	Yes	No	Yes. Article 5 of the Administrative Instruction nr.03/2022 mandates a maximum group size.	Yes Article 24 of the Law on Education mandates a teacher-to-child ratio for public childcare.	No.	Yes. Article 30 of the Law on Education mandates a teacher-to-child ratio for public childcare.
Does the law mandate a max. group size at private childcare centers?	No	No	Yes. Article 5 of the Administrative Instruction nr.03/2022 mandates a maximum group size.	Yes Article 24 of the Law on Education mandates a teacher-to-child ratio for private childcare.	According to the Law on Preschool Education, Article 18, the maximum group size for private childcare centers is 25 children per educator.	Yes. Article 30 of the Law on Education mandates a teacher-to-child ratio for private childcare.
Does the law require mandatory training of the staff – teachers, directors, caregivers?	Yes. According to the Law on Pre-University Education, the staff of educational institutions, including teachers, directors, and caregivers, are required to undergo periodic professional development programs. Administrative guidance Continuous professional development system for education workers.	The law does not explicitly require mandatory training. However, there are some regulations and standards that imply the need for continuous professional development and improvement of the quality of services such as: the Framework Law on Preschool Education stipulates that preschool institutions should provide opportunities for staff to participate in various forms of training and education.	While the law doesn't require mandatory training of the staff– teachers, directors, caregivers it requires Preschool institutions to provide professional development for staff. (Article 9.1.10)	No.	For the ECEC sector the Law on Child Protection prescribes that the employees in this sector are obliged to get involved in CPD and that the forms of the CPD are prescribed by the Minister and are not. The Bylaw for CPD of the employees in kindergartens regulates the forms and methods of training as well as the nature of the training.	No



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QUALITY	Albania	Bosnia and Herzegovina	Kosovo	Montenegro	North Macedonia	Serbia
Does the law require educators at private centers to undergo training?	No.	No information	While the law doesn't require mandatory training of the staff, it requires Preschool institutions to provide professional development for staff.	No.	No information	No
What is the mandatory number of training hours for teachers within three years?	Administrative guidance, Article 6, regulates training hours for teachers.	No information	Not regulated yet	Not regulated	The minimum is set at 60 hours of training spread in three school years (Article 27). Out of those at least 40 are in programs accredited by Bureau for Development of Education (Article 27) and the rest are in other programs	Not regulated by law.
Does the country have a system for the accreditation of programs and providers?	Administrative guidance, Continuous professional development system for education workers, articles 8,9,10,11,12 regulate the system of accreditation of program providers.	BiH has a system for the accreditation of programs and providers for in-service teacher training. The system is based on the Law on Higher Education and the Standards and Guidelines for Quality Assurance in the European Higher Education Area.	Yes. Ministry of Education has a system of accreditation of programs and providers.	Not regulated yet		Not regulated by law.
How many hours of mandatory training should be obtained from an accredited provider?	Administrative guidance, Continuous professional development system for education workers, Article 6, regulates training hours for teachers.	Teachers are required to obtain at least 40 hours of mandatory in-service training every five years from accredited providers.	The issue of mandatory training is not regulated yet.	Not regulated yet	In North Macedonia are required to obtain at least 60 hours of mandatory in-service training per three years.	Not regulated by law.
Are the structural and process standards of services defined by law?	The structural standards of services are regulated by the Law on Public Procurement.	The structural standards of services govern the quality, safety and performance of various types of services, such as health, education, transport, energy, water and sanitation.	Yes. The Administrative instruction 03/2022 article 5.	Yes. Law on Preschool education. Article 24	The structural standards of services are defined by the Law on Public Procurement	Yes, Law on preschool education Article 30
Does the law require inspections for compliance with laws and others?	The law requires inspections for compliance with laws and other regulations in various fields of public interest.	According to the Law on Inspection Supervision, inspections are carried out to ensure compliance with laws and other regulations, standards, and norms.	Yes	Yes	The Law on Inspection Supervision states that inspections are conducted to ensure compliance with laws and other regulations, standards, and general acts.	Yes, the Ministry of Education is competent for inspections and observation, Article 48.

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QUALITY	Albania	Bosnia and Herzegovina	Kosovo	Montenegro	North Macedonia	Serbia
Does the law require inspections for compliance with laws and others and how often?	Yes	The frequency of these inspections depends on the type and origin of the goods, as well as risk assessment by the competent authorities.	Yes. According to the law on Early Childhood Education article 7 MEST provides inspections and observations for preschool education.	Yes. Through the National Council on Education and Ministry of Education	The frequency of inspections depends on the risk assessment of the inspected entities, which is determined by the competent inspection authorities.	Yes, the Ministry of Education is competent for inspections and observation. The frequency of inspections depends on the risk assessment of the inspected entities.
Does the government require reporting of information by public centers?	Centers are obliged to report information on their activities, staff, finances, and beneficiaries to the Ministry of Health and Social Protection	Public childcare centers are obliged to report information on their activities, staff, finances, and quality standards to the relevant authorities.	Yes, public childcare centers are required to provide information to central authorities—ministry of education.	Public childcare centers are required to provide information (Pedagogical evidence) to central authorities—ministry of education. Article 34	Public childcare centers are obliged to report information on their activities, finances, staff and beneficiaries to the Ministry of Labor and	Yes
Does the government require reporting of information by private centers?		Yes. The Law on Preschool Education, article 27 annual work program and work reports.	Private childcare centers are required to provide information to central authorities—ministry of education, i.e. number of children, educator-to-teacher ratio, etc.		Private childcare centers must report to the Ministry of Labor and Social Policy on their activities, staff qualifications, number of children, fees, and other relevant information.	
Are there penalties imposed for noncompliance on public centers? If yes, what kind of penalties?	If centers fail to comply with the standards, they may face administrative sanctions, such as warnings, fines, suspension or revocation of their license.	Penalties are left to the discretion of the authorities in each entity, canton or district.	The issue of noncompliance is not regulated by Law on ECE.	Yes according to the article 37.A fine of 500 to 10,000 euros will be imposed for a violation of the institution if: 1) does not implement the prescribed program of educational work (Art. 15–19); 2) fails to adopt an annual work program (Article 21); 3) performs educational activities in educational groups formed contrary to Article 24 of this law; 4) does not keep prescribed records (Article 34). For the misdemeanor referred to in paragraph 1 of this article, the responsible person in the institution will be fined from 30 to 1,000 euros.	According to the Law on Child Protection, if public and private institutions fail to comply with the requirements, they may face penalties such as fines, suspension of license, or closure of the institution.	A pre-school institution, will be fined for a misdemeanor from 50,000* to 1,000,000 dinars if: 1) does not allow the parents to declare in which language the child will receive preschool upbringing and education (Article 5, paragraph 2); 2) does not keep, improperly keeps or does not keep prescribed records on educational work (Articles 6 and 7); 3) fails to notify the parents, or other legal representative of the child* and the local self-government unit within the prescribed period, about children who have not enrolled, or are not attending the preparatory preschool program (Article 23, paragraph 2); 4) does not form educational groups in accordance with Art. 30 and 31 of this law.

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QUALITY	Albania	Bosnia and Herzegovina	Kosovo	Montenegro	North Macedonia	Serbia
Are there penalties imposed for noncompliance on private centers? If yes, what kind of penalties?	Clarification above also applies to private centers	Penalties are left to the discretion of the authorities in each entity, canton or district.	The issue of noncompliance is not regulated by Law on ECE.	Same as for public centers	Same as for public centers	Same as for public centers
Is dismissal of pregnant workers prohibited?	Yes, Law No. 7961 of 12 July 1995, Art. 105/A(2) and 107.	Yes, according to the Law on Gender Equality,	Yes. Law on Labor article 46	Yes. Law on Labor article 121	Yes	Yes, according to Law on Labor article 187
Does the country have a program or strategy for the inclusion of children with disabilities in mainstream kindergartens?	National Strategy for People with Disabilities 2016–2020, which includes a specific objective on inclusive education.	The country has adopted a Strategy for the Development of Preschool Education (2017–2022), which aims to increase the access and quality of early childhood education for all children, especially those from marginalized groups.	Inclusion of children with disabilities in mainstream kindergartens is part of the Strategy for Preschool Education.	Yes. Beside the Law regulations there a guide for children with special educational needs	The country has adopted a National Strategy for the Development of Education 2018–2025, which aims to promote inclusive education and improve the quality and accessibility of early childhood education for all children, especially marginalized groups.	
Are there specialized educational programs tailored for children with disabilities?	There are no specific programs for children with disabilities	There are no specific programs for children with disabilities	Yes. The Ministry of Education has specialized educational programs tailored for children with disabilities.	Yes. The Ministry of Education has specialized educational programs tailored for children with disabilities.	There are no specific programs for children with disabilities	Yes. The online Social Inclusion Course was developed under the project “Support for the Improvement of Social Inclusion in the Republic of Serbia”.
Is there a dedicated support system in place for vulnerable children facing socio-economic challenges?	There are no prioritized child protection and development systems.	No.	The Ministry of Education through partner organization has a dedicated support system in place for vulnerable children facing socio-economic challenges	The Ministry of Education through partner organization has a dedicated support system in place for vulnerable children facing socio-economic challenges	Partially	
Is there any early childhood intervention program in place – i.e. growth monitoring tool that evaluates/ keeps track of children's development and identifies disabilities on time	No.	No.	The Ministry of Education through partner organization has early childhood intervention initiative in place – i.e. growth monitoring tool that evaluates/keeps track of children's development and identifies disabilities.	The Ministry of Education through partner organization has early childhood intervention initiative in place – i.e. growth monitoring tool that evaluates/keeps track of children's development and identifies disabilities.	No	Yes, through international partners.



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QUALITY	Albania	Bosnia and Herzegovina	Kosovo	Montenegro	North Macedonia	Serbia
Are children with disabilities provided with appropriate healthcare services and accommodation?		No information	There are provisions with appropriate healthcare services for children with disabilities depending on availability.	There are provisions with appropriate healthcare services for children with disabilities depending on availability.	No information	There are provisions with appropriate healthcare services for children with disabilities depending on availability
Is there comprehensive training available for educators and caregivers to effectively support children with disabilities?	No. There is no comprehensive training program for educators and caregivers for supporting CwD		Yes, there is comprehensive training available for caregivers to support children with disability. Additional in-service training has been organized.	According to article 18 of the Law on PE: The special program of preschool upbringing contains educational work for children with disabilities and developmental difficulties, in accordance with a special regulation.	No information	There is comprehensive training available for educators and caregivers to effectively support children with disabilities

Annex 3. Interview guide for Central and local government representatives

INTRODUCTION

Welcome and introduction. Explanation of the purpose of the interview.

1. Gender / M F
2. What is the name of your institution?
3. What is the name of the sector you work in?
4. What is your role and responsibilities in the institution?

GENERAL INFORMATION ABOUT THE SYSTEM

1. What is the role of the institution you represent in designing and implementing system-wide:
 - 1.1. policies
 - 1.2. laws/administration instructions
 - 1.3. quality standards
 - 1.4. accreditation processes
 - 1.5. rulebooks
 - 1.6. monitoring and assessment processes

- 1.7. financing
 - 1.8. service provision itself
 - 1.9. benefits' administration and
 - 1.10. HR related to ECEC services?
2. What are the main benefits and services that the institution provides in relation to ECEC?
 - 2.1. During pregnancy to/and birth
 - 2.2. The first year
 - 2.3. Early childhood
3. What about the other central or local government institutions? (here we will probe based on the findings from the "Typology of matrices and services")?
4. What is the specific role of Ministry of Education and Ministry of Health/Social Protection?
 - 4.1. How do they cooperate?
5. How do you evaluate the intersectoral cooperation of the social, health care and education systems?
6. What are the main responsibilities of the central and local government for the provision of ECEC services?
 - 6.1. How are competencies divided between central and local government when managing ECEC services and benefits?
 - 6.2. Are there any overlapping competencies? If yes, which are they?
 - 6.3. Are there any gaps?
 - 6.4. How are gaps handled?
 - 6.5. What are the mechanisms for collaboration between central and local government? (**note to the interviewer: by mechanisms here we mean memoranda of understanding, agreements, protocols for collaborations, funding procedures from central to local government or an appointed staff member for this collaboration at both levels and other means if the interviewee mentions.*)
 - 6.6. Which aspects of this collaboration work well?
 - 6.7. What are the challenges?
7. What is the role of private sector and NGOs, are they i.e. providers of ECEC services, providers of training for professionals, providers of quality control services or other? How do they cooperate:
 - 7.1. With central government?
 - 7.2. With local government?
 - 7.3. Which aspects of the collaboration work well?
 - 7.4. What are the challenges?
8. Does your institution contract out private sector providers/NGOs for the provision of some ECEC services?

- 8.1. If yes, for which services?
 - 8.1.1. Preschools (kindergartens from 3 to 6 years old)
 - 8.1.2. Nurseries (from 0 to 3 years old)
 - 8.1.3. Day care centers
 - 8.1.4. Health Centers/Ambulatory services
 - 8.1.5. Foster Care
 - 8.1.6. Residential care when is necessary
 - 8.1.7. Childminders (when regulated by law)
 - 8.1.8. Nannies or tutors (when regulated by law)
 - 8.2. How are private providers selected for the provision of services? *Ask for: competitively or not, on what basis, for how long are they typically contracted?*
 - 8.3. How are private providers paid? *Ask if they are paid: lump sum with certain targets/specific services, per service? Per person? A mix?*
 - 8.4. Is it difficult to find quality service providers? Probe for: do you see contracts that cannot be tendered? Do you encounter issues of quality once contracts are tendered?
 - 8.5. If so, is this in general or more difficult for specific services or in specific locations? If more specific in some, in which ones?
 - 8.6. If difficult, why do you think it is difficult? Probe for: lack of interest from service providers, difficulties in completing the criteria for the bidding in terms of high standards, tight schedules or other issues (*please explore more*) or other challenges.
 - 8.7. Is their remuneration related to some measure of quality of services provided?
 - 8.8. What works well when contracting these services out?
 - 8.9. What are the challenges when contracting these services out?
9. Is there a need to improve the overall legal (normative) framework? If yes, where?

ACCESS AND EQUITY (**note to the interviewer: ask the interviewee to mention the 2 main benefits and 2 main services and discuss these in the following questions related to services and benefits*)

1. What are the eligibility criteria for benefiting from benefits and services?
 - 1.1. Are there any challenges in fulfilling the eligibility criteria (e.g. age of the child, parent's employment status)?
 - 1.2. Are there any challenges in understanding or assessing the criteria correctly, such as in a case where parents are employed in the informal sector?
 - 1.2.1. If so, what are these challenges?
 - 1.2.2. How do you resolve them?
2. Is the benefits and services package same or different throughout municipalities?
 - 2.3. If it is different, on what basis is the package provided in different municipalities? Please elaborate on what is the best/worst package.

3. Are there prioritization criteria in case the demand for services exceeds supply?
 - 3.1. If yes, what are these prioritization criteria for the different services and benefits?
4. Are there any criteria used for offering fee reductions or priority admission?
 - 4.1. If so, what are the criteria?
5. What are the primary factors that deter parents from enrolling their children in early childhood education and care (ECEC) services?
 - 5.1. Structural Quality: Could inadequate infrastructure, such as poor hygiene, overcrowded playrooms, or an unfavorable teacher–student ratio, be contributing factors?
 - 5.2. Accessibility: Is there a lack of available ECEC services within a convenient distance from family homes?
 - 5.3. Process Quality: How might an inadequate learning environment, lack of inclusivity, teacher qualifications, or learning programs impact enrollment?
 - 5.4. Social norms? (is there a belief that children should stay home with their mothers/family? Or that they are being raised better if they stay in the home?)
 - 5.5. What about the fee for ECEC and the hidden costs that parents are often asked to pay?
 - 5.6. Additionally, could you specify the sources of your insights regarding these issues? Are they based on assessments, classroom observations, inspections, or feedback from parents?

AVAILABILITY AND COVERAGE (*Note to the interviewer: Before beginning this section ask the interviewees if they have the data and can complete the accompanying list of services with the respective information.)

1. Are the current services and benefits sufficient to cover the needs of all families?
 - 1.1. Are there any differences between urban and rural areas?
 - 1.2. What are the current solutions to the potential geographical disproportional distribution of ECEC services?
 - 1.2.1. If not, what benefits/services are lacking/limited (e.g. full day kindergartens/nurseries with meals, at least 20 operating hours per week in urban and rural areas)? (**note to the interviewer: as mentioned above, focus on 2 main benefits or services*)
 - 1.2.2. Are there waiting lists with providers?
 - 1.2.3. Do you need to ration the provision of services or benefits?
 - 1.2.4. If yes, which ones?
2. Are there requirements for the minimum operating hours per week for ECEC services (20h per week or other)?
 - 2.1. Are there any differences in practice in urban and rural areas?
 - 2.2. What about between public, private and other alternative forms of service providers?
3. Do public or private ECEC centers provide flexible operating hours?

- 3.1. What about drop-in service?
 - 3.2. If yes, how is it regulated?
 - 3.3. If no, what are the barriers to provide it?
4. What needs to be done to meet all the needs of children and parents for child-care services?

AFFORDABILITY

1. What are the typical prices/ranges for the different services? *Please specify the UNIT: per service, per child, per month, per hour or another unit.*
 - 1.1. Preschools from 3 to 6 years old – Public and private
 - 1.2. Nurseries – from 0 to 3 years old – public and private
 - 1.3. Childminders
 - 1.4. Nannies or babysitters
 - 1.5. Other services
2. How affordable are public, private and other alternative forms of childcare services for families?
 - 2.1. Are there any hidden costs for parents, besides the fees?
 - 2.2. If yes, how much out-of-pocket money will a family spent to cover the hidden costs during a month?
 - 2.3. Are there any differences between urban and rural areas?
3. Are there specific efforts to make them affordable and support their provision in terms of demand and supply?
 - 3.1. *Supply*
 - 3.2. state subsidies for private childcare provision given to the private service providers
 - 3.3. *Demand*
 - 3.3.1. Fee exemptions
 - 3.3.2. Childcare tax allowances
 - 3.3.3. Education allowance or
 - 3.3.4. Initiatives from the private sector on subsidizing childcare?

MECHANISMS FOR QUALITY ASSURANCE

1. What are the criteria and process for licensing and accreditation of public and private service providers?
 - 1.1. Are there any differences in licensing or accreditation procedures between public and private service providers?
2. How long does the licensing procedure takes?
3. Have you heard of complaints of irregularities from providers applying for a license?

4. What specific quality standards are mandated for Early Childhood Education and Care (ECEC) programs?
5. Can you detail the:
 - 5.1. safety protocols
 - 5.2. infrastructure requisites, and
 - 5.3. spatial guidelines that ECEC facilities must adhere to?
6. What are the established nutritional guidelines and standards for children within ECEC settings?

*Additionally: (*note to the interviewer: the following questions on quality may need to be consulted with other staff members in the agency. In that case, if the interviewee does not have the information, send the specific questions that are not answered by email and ask them to follow up by a phone call in 3–4 days or when it is convenient for them)*

7. Structural Quality: What are the prescribed group sizes, staff-to-child ratios, and infrastructure requirements for optimal ECEC environments?
8. Program Quality: Could you elaborate on the curriculum, educational materials, program duration and intensity, as well as the extent of parental involvement expected in ECEC programs?
9. Process Quality: How are the quality of interactions between children and their caregivers, as well as among peers, assessed and ensured in ECEC settings?
10. Workforce Quality: What qualifications and competencies are considered essential for the ECEC workforce to maintain high standards of care and education? Please specify for the principal, the head teacher, the educator and assistant educator.
11. What are the mechanisms used to ensure quality assurance? Ask about:
 - 11.1. Classroom observation tool (s)? (Yes/No)
 - 11.1.1. How is it conducted? How often?
 - 11.1.2. How are the results of these observations considered for improving the quality of the service? Is there any follow-up?
 - 11.1.3. Are the results of observations tools published? If yes, where?
 - 11.2. Monitoring and/or inspection (s) (Yes/No)
 - 11.2.1. How many monitoring or inspection visits does ECEC have annually?
 - 11.2.2. Is there sufficient staff to conduct these visits?
 - 11.2.3. Is the staff specialized to conduct these types of monitoring and inspection visits?
 - 11.2.4. Are the findings of inspection or monitoring visits published somewhere? Where? (**note to the interviewer: if they mention a website please ask them to show you in your mobile the specific website*)
 - 11.2.5. What happens if childcare doesn't comply with the quality standards?

- 11.3. Self-evaluation survey (Yes/No)
 - 11.3.1. How often do ECEC facilities (nurseries/kindergartens) conduct self-evaluation surveys?
 - 11.3.2. What are the components of a self-evaluation survey?
 - 11.3.3. Are the results of the survey published somewhere? If yes, where?
 - 11.3.4. In what ways is this survey taken into consideration to improve the quality of the service?
- 11.4. Parental feedback (Yes/No)
 - 11.4.1. In what ways do ECEC facilities consider receiving parental feedback for the services?
 - 11.4.2. Is this a regular procedure? If yes, how often is it carried out?
 - 11.4.3. How is parental feedback considered for the improvement of the quality of services? How is this process documented?
- 11.5. Measuring children's outcomes – developmental and learning (Yes/No)
 - 11.5.1. Do the ECEC facilities measure developmental and learning outcomes for children?
 - 11.5.2. If yes, how often does this happen?
 - 11.5.3. In what does this process help to improve the quality of ECEC settings, processes, interactions and workforce?
- 12. Are there mechanisms in the community to raise issues linked to the quality of services provided?
 - 12.1. What are those mechanisms? Are they used?
 - 12.2. What do potential users think of them? Do they know these exist?
- 13. Is the community involved in the design of the guidelines for the curriculum?
- 14. What are the feedback mechanisms for evolving curriculum?
- 15. Is it flexible enough to change over time and who could influence the change?
- 16. Does the ECEC programs have any parental programs?
 - 16.1. What are the main topics addressed in such programs?
 - 16.2. What are the advantages of these programs?
 - 16.3. What are the challenges to deliver them?

HUMAN RESOURCES

- 1. What is the current situation of ECEC workforce, in terms of number of workforce, skills and other components? *Ask if working in ECEC is attractive, what is the influx in the profession?*
 - 1.1. Are there any unmet needs or will they potentially be any unmet needs based on the enrolment of children and influx of people in the profession?
 - 1.2. What about skills mismatches?

- 1.3. Do you conduct analysis of these issues? If yes, how often? How are the findings of the analysis used?
 - 1.4. If it is not an attractive job, what are the reasons? Are there any initiatives to change the situation?
2. Are there any minimum qualifications to become a preschool teacher, the head of an ECEC center or a childminder? *Ask for*
 - 2.1. University degree
 - 2.2. Training (s)
 - 2.3. Induction phase
 - 2.4. Other (s)
3. What are the requirements for continuous professional development?
 - 3.1. How are they being met in practice (minimum duration and nature of mandatory requirement, accreditation, periodicity)?
 - 3.2. What are the challenges?
 - 3.3. Is there a budget item for the professional development of teachers?

FINANCING AND SPENDING

1. How does the system of financing childcare services work?
 - 1.1. How is financing divided between central government and municipalities?
 - 1.2. Are there enough funds in the funding system as needed?
2. What is the mandated level of co-payment from families, if any?
3. Do families have to pay any out-of-pocket money to ECEC programs, despite the law? *Ask for payments to cover any didactic materials, for heating or others.*
4. Do you have instruments to engage with the private sector for the provision of ECEC services?
5. On what basis do you give the payments to the private sector providers? *Ask for*
 - 5.1. *Per capita basis*
 - 5.2. *Historical data*
 - 5.3. *Other ways*

BEST PRACTICES

1. Are there any best practices in the field of childcare services that you find particularly noteworthy? Please describe.
2. *Are there any other important issues to discuss about nursery/kindergarten that are not mentioned here?*
3. *Do you have any questions for me?*

Annex 4. Interview guide for directors of public/private nurseries, kindergartens, community centers, NGOs and mother/child primary health care

INTRODUCTION

1. Gender / M F
2. What is the name of your institution?
3. What is the name of the sector you work in?
4. What types of services do you offer?
 - 4.1. What are the main challenges you face in service delivery?

MAPPING OF BENEFITS AND SERVICES (**note to the interviewer: if the key informant does not have knowledge about a question you can skip it and continue with the following one*)

1. What are the main benefits and services for childcare, starting from pregnancy and birth to school age?
 - 1.1. What institution is responsible for the provision of the specific benefits/services (Health, Social Protection, Education)?
 - 1.2. Are these sufficient to cover the needs of all families?
 - 1.3. If not, what benefits/services are lacking/limited? *Ask for: full day kindergartens/nurseries with meals, at least 20 operating hours per week in urban and rural areas, immunization, medical expenses or other*

ACCESS AND EQUITY

1. What are the eligibility criteria for enrolment and for being accepted in your service?
 - 1.1. Do you have a waiting list?
 - 1.2. Are there any challenges in fulfilling the eligibility criteria (e.g. age of the child, prioritization based on parent's employment status or other)?
 - 1.3. Are there any challenges in understanding or assessing the criteria correctly, such as in a case where parents are employed in the informal market?
 - 1.3.1. If so, what are these challenges?
 - 1.3.2. How do you resolve them?
2. What are the programs to support vulnerable families to access your service, if any? Ask for:
 - 2.1. quotas for children in vulnerable situations
 - 2.2. fee exemptions for children with special needs or other vulnerable groups

- 2.3. public subsidies for families in economic assistance scheme
- 2.4. financial support/subsidy for sending children to private childcare?
- 3. Are there any criteria for offering fee reductions or priority admission?
- 4. Are there prioritization criteria in case the demand for services exceeds supply?
 - 4.1. If yes, what are these prioritization criteria for the different services and benefits?
- 5. What are the primary factors that deter parents from enrolling their children in early childhood education and care (ECEC) services?
 - 5.1. Structural Quality: Could inadequate infrastructure, such as poor hygiene, overcrowded playrooms, or an unfavorable teacher–student ratio, be contributing factors?
 - 5.2. Accessibility: Is there a lack of available ECEC services within a convenient distance from family homes?
 - 5.3. Process Quality: How might an inadequate learning environment, lack of inclusivity, teacher qualifications, or learning programs impact enrollment?
 - 5.4. Social norms: is there a belief that children should stay home with their mothers/family? Or that they are being raised better if they stay in the home?
 - 5.5. Additionally, could you specify the sources of your insights regarding these issues? Are they based on assessments, classroom observations, inspections, or feedback from parents?

AVAILABILITY AND COVERAGE

- 1. What is the current demand and supply ratio in your service and in the municipality you operate?
 - 1.1. Are there any differences between this region and other areas?
- 2. Are the current services and benefits sufficient to cover the needs of all families?
 - 2.1. If not, what benefits/services are lacking/limited (e.g. full day kindergartens/nurseries with meals, at least 20 operating hours per week in urban and rural areas)?
- 3. Do you or other service providers provide flexible operating hours? What about drop-in service?
 - 3.1. If yes, how is it regulated?
 - 3.2. If no, what are the barriers to provide it?
- 4. What needs to be done to meet all the needs of children and parents for childcare services?

AFFORDABILITY

- 1. What are the prices for your service?
- 2. How affordable are your services for families?

3. Throughout the year do parents have to contribute for the childcare service in any other way: e.g. to pay for fixing damages in the rooms, for heating/cooling, coloring pencils or other materials of this kind?
4. If yes, how much out-of-pocket money will a family spend to cover the hidden costs in a month per child?
 - 4.1. Are there any differences between urban and rural areas?
5. Are there specific efforts to make them affordable and support their provision in terms of demand and supply?
 - 5.1. *Supply*
 - 5.1.1. state subsidies for private childcare provision given to the private service providers
 - 5.2. *Demand*
 - 5.2.1. Fee exemptions
 - 5.2.2. Childcare tax allowances
 - 5.2.3. Education allowance or
 - 5.2.4. Initiatives from the private sector on subsidizing childcare?

MECHANISMS FOR QUALITY ASSURANCE

1. What are the criteria and processes for licensing and accreditation for your service? Are they the same for other providers as well?
2. How long does the licensing procedure take?
3. Have you heard/did you have any complaints of irregularities from providers applying for a license?
4. What specific quality standards are mandated for Early Childhood Education and Care (ECEC) programs?
5. How easy/difficult is it to comply with the requirements of quality standards?
6. Can you detail the:
 - 6.1. safety protocols
 - 6.2. infrastructure requisites, and
 - 6.3. spatial guidelines you must adhere to?
7. What are the established nutritional guidelines and standards for children?

Additionally:

8. Structural Quality: What are the prescribed group sizes, staff-to-child ratios, and infrastructure requirements for optimal ECEC environment?

9. Program Quality: Could you elaborate on the curriculum, educational materials, program duration and intensity, as well as the extent of parental involvement expected in your program?
10. Process Quality: How are the quality of interactions between children and their caregivers, as well as among peers, assessed and ensured in your setting?
11. Workforce Quality: What qualifications and competencies are considered essential for the ECEC workforce to maintain high standards of care and education?
12. What are the mechanisms you use to ensure quality assurance? Ask about:
 - 12.1. Classroom observation tool (s)? (Yes/No)
 - 12.1.1. How is it conducted?
 - 12.1.2. How are the results of these observations considered for improving the quality of the service? If there any follow-up?
 - 12.1.3. Are the results of observations tools published? If yes, where?
 - 12.2. Monitoring and/or inspection (s) (Yes/No)
 - 12.2.1. How many monitoring or inspection visits do you have annually?
 - 12.2.2. Are the findings of inspection or monitoring visits published somewhere? Where? (**note to the interviewer: if they mention a website please ask them to show you in your mobile the specific website*)
 - 12.2.3. What happens if you don't comply with the quality standards?
 - 12.3. Self-evaluation survey (Yes/No)
 - 12.3.1. How often do you conduct self-evaluation surveys?
 - 12.3.2. What are the components of your self-evaluation survey?
 - 12.3.3. Are the results of the survey published somewhere? If yes, where?
 - 12.3.4. In what ways are these survey results taken into consideration to improve the quality of In your service?
 - 12.4. Parental feedback (Yes/No)
 - 12.4.1. In what ways do you receive parental feedback for the service?
 - 12.4.2. Is this a regular procedure? If yes, how often is it carried out?
 - 12.4.3. How is parental feedback considered for the improvement of the quality of your service? How is this process documented?
 - 12.5. Measuring children's outcomes – developmental and learning (Yes/No)
 - 12.5.1. Do you measure developmental and learning outcomes for children?
 - 12.5.2. If yes, how often does this happen?
 - 12.5.3. In what ways does this process help to improve the quality of your setting, processes, interactions and workforce?
13. Are there mechanisms in the community to raise issues linked to the quality of your services?
 - 13.1. What are those mechanisms? Are they used?
 - 13.2. What do potential users think of them? Do they know these exist?

14. Do you implement any parental program?

- 14.1. What are the main topics addressed in such programs?
- 14.2. What are the advantages of these programs?
- 14.3. What are the challenges to deliver them?

HUMAN RESOURCES

- 1. What is the current situation of the workforce in your service?
 - 1.1. Have you faced any staff shortages?
 - 1.2. Skills mismatches?
 - 1.3. What do you do for staff retention?
- 2. What is the future of the profession and the workforce based on your experience?
- 3. Are there any minimum qualifications to become a preschool teacher, the head of an ECEC center or a childminder? *Ask for*
 - 3.1. University degree
 - 3.2. Training (s)
 - 3.3. Induction phase
 - 3.4. Other (s)
- 4. What are the requirements for continuous professional development?
 - 4.1. How are they being met in practice (minimum duration and nature of mandatory requirement, accreditation, periodicity)?
 - 4.2. What are the challenges?

FINANCING AND SPENDING

- 1. How does the system of financing ECEC services work?
- 2. Do you receive any funds from the state? If yes, what % more or less of costs is covered by these funds and what is covered by the families of the children?
 - 2.1. Are there enough funds in the funding system as needed?
 - 2.2. Do you face any challenges to receive funds on time?
- 3. What is the level of co-payment from families, if any?

BEST PRACTICES

- 1. Are there any best practices in the field of childcare services that you find particularly noteworthy? Please describe.
- 2. *Are there any other important issues to discuss about childcare services that are not mentioned here?*
- 3. *Do you have any questions for me?*

Annex 5. Guidance for focus group discussions, parents and grandparents

GENERAL INFORMATION

1. Age
2. Gender
3. Urban or rural area
4. Number of children
 - 4.1. Age of the child/ren
 - 4.2. Child/ren enrolled in a public or private nursery/kindergarten

ACCESS, EQUITY, AVAILABILITY AND AFFORDABILITY

1. Have you enrolled your child in a nursery or kindergarten?
 - 1.1. If no, why not?
2. Would you have wanted to enroll your child earlier in nursery/kindergarten?
 - 2.1. If yes, how did you organize care for the child before the nursery/kindergarten acceptance?
3. What was your experience from enrolling your child in the nursery/kindergarten?
 - 3.1. Did you face any difficulties?
 - 3.2. How did you overcome them?
4. What difficulties do you face in bringing your child to kindergarten? What do you do to overcome them?
5. Do you pay a fee for your child to attend the nursery/kindergarten?
 - 5.1. If yes, how much is it?
 - 5.2. How do you manage to pay for it?
 - 5.3. Approximately what percentage of your family's monthly income is the fee for the nursery/kindergarten?
6. How much time does it take you to go to the kindergarten/nursery in the morning?
7. What other requirements are there for a child to attend a nursery/kindergarten (clothes, food, other)?
 - 7.1. How do you meet them?
8. Do you benefit from any program to support you in covering the expenses of the nursery/kindergarten?
 - 8.1. If yes, what institution provides it?

Ask for:

- 8.2. financial support
 - 8.3. child allowance
 - 8.4. fee exemption
 - 8.5. targeted programs for children from minorities or with special needs
 - 8.6. other?
9. How does this program help you in fulfilling your family's needs to afford nursery or kindergarten?
10. How many hours per week does your child/ren attend/s nursery/kindergarten?
- 10.1. Are these hours flexible?
 - 10.2. How do you manage to bring and collect your child according to your working hours?

PERCEPTION OF THE QUALITY OF THE NURSERY/KINDERGARTEN

- 1. What type of ECEC does your child attend? Ask for: public, private or other type
- 2. What is your overall experience with kindergarten? Could you specify what you like and what you don't like?
- 3. How would you assess the overall quality of the services?
- 4. How many children are in the same group as your child? How many teachers?
 - 4.1. Do you believe the teacher–child ration is appropriate as it is?
- 5. How would you assess the quality of infrastructure, space, and safety of the building and the classes?
- 6. How would you assess the care, hygiene and food quality of the nursery/kindergarten?
- 7. How would you assess the available and used teaching and learning materials? What about the overall educational program they follow?
- 8. How is your interaction with your child's teacher (s)?
 - 8.1. What about with the kindergarten's support staff (psychologist/social worker)?
 - 8.2. And the director?
- 9. How would you assess the professionalism of the child's teacher? What about her interaction with the child?
- 10. Does the nursery/kindergarten conduct regular group meetings with parents?
 - 10.1. How often?
 - 10.2. What are the topics discussed in the meetings?
 - 10.3. Can you request an ad hoc meeting when it is needed?

11. Does the nursery/kindergarten provide any parenting programs?
 - 11.1. What are the topics discussed there?
 - 11.2. How satisfied are you with the quality of these programs?
12. What is your role in monitoring the nursery/kindergarten quality of service?
 - 12.1. Have you ever given a chance to provide your feedback for something?
 - 12.2. What happened after?

SUGGESTIONS FOR IMPROVEMENT *(if not already mentioned above)*

1. Overall, what do you believe deters parents from enrolling their children in nursery/kindergarten?
2. What would you suggest to improve access for all children in nurseries and kindergartens?
3. Overall, what do you believe is the quality of public nurseries/kindergartens?
 - 3.1. What about the private ones?
 - 3.2. What can be done to improve it?
4. *Are there any other important issues to discuss about nursery/kindergarten that are not mentioned here?*
5. *Do you have any questions for me?*

Annex 6. Guidance for focus group discussions, formal and informal paid caregivers

INTRODUCTION

Welcome and introduction. Explanation of the purpose of the interview.

1. Gender / M F
2. Age
3. Years of experience as a babysitter

CAREGIVING EXPERIENCE

1. How long have you been a babysitter for this child?
2. What are the daily caregiving tasks and responsibilities you have to do?

3. What is the age of the child? Does he/she have any special needs or medical conditions?
4. What are the challenges of being a babysitter? How do you overcome them?
5. Why did you choose to become a babysitter?
6. What is your wage as a babysitter? How is it compared to the minimum wage? Do you have social and health insurance?
7. What are your working hours? Are they fixed or flexible?
8. Were you hired through an agency or directly from the parents? If from an agency, how does the contracting system work? If directly from parents, how did they reach out to you?
9. How easy/difficult is to find a job as a babysitter? Is it an attractive profession?
10. To the extent that you know, why don't parents enroll their children in nurseries/ kindergartens? Why do they prefer babysitters?

CAREGIVER PROFESSIONAL BACKGROUND

1. What is your educational background? Do you have any previous professional experience in working with children? Were you trained by an agency to be a child's babysitter? If yes, from who?
2. Did you have to obtain a license in order to be a babysitter? If yes, what were the requirements?
3. Do you have to do something to maintain your license, e.g. to continue training and other qualifications?
4. How is your work monitored? By whom?

Are there any other issues important to discuss about your experience that are not mentioned here.



