

Busy Bees' response to the Statement of Scope for the CMA's market study into early years education and childcare services in England

1. Background and summary

- 1.1 Busy Bees welcomes the opportunity to comment on the CMA's proposed Statement of Scope for its market study into the early years education and childcare (**EYEC**) sector in England.¹ Busy Bees is committed to engaging constructively with the CMA throughout this process and trusts that its submissions - drawing on decades of operational experience - will assist the CMA in developing a thorough, evidence-based assessment.
- 1.2 Busy Bees was founded in 1983 by three families in Staffordshire and since then its operations in England have grown to over 335 centres operating under the Busy Bees, Montessori and Kids 1st brands. With its experience engaging with over 99 English local authorities, Busy Bees has a national perspective on the EYEC sector.
- 1.3 EYEC plays a vital role in society. A child's early years are the most formative for their long-term wellbeing, development and life prospects.
- 1.4 Reliable, financially sustainable, high-quality and affordable EYEC is not merely a service: it is essential for achieving economic and social objectives, enabling parental participation in the workforce and underpinning a well-functioning economy.
- 1.5 **Busy Bees recognises the importance of the service it provides and is deeply committed to giving every child the best start in life.** In pursuit of this mission, Busy Bees has made, and continues to make, significant investments in: (i) ensuring all Busy Bees' sites maintain the highest standards in safeguarding, safety and care; (ii) its own curriculum, Bee Curious, the UK's only independently evaluated early years curriculum;² (iii) workforce development - including apprenticeship programmes - to help address the skilled labour shortage that constrains the sector; and (iv) improvements to parent-facing communications, including on the scope of government-funded entitlements. These investments facilitate Busy Bees' provision of high-quality, affordable and sustainable EYEC in safe, nurturing and stimulating environments, while also giving families the information they need to make informed and confident choices about their child's care.
- 1.6 **The EYEC sector in England is highly competitive and fragmented. Families can choose from a diverse set of high-quality providers** - spanning nurseries, pre-schools, childminders and school-based settings of varying sizes, ownership

¹ Unless otherwise defined, terms used in this response have the same meaning as in the Statement of Scope.

² [Bee Curious - Welcome to the Busy Bees Curriculum](#).

models (e.g. private, public or charitable) and learning approaches - catering for a range of needs and preferences.

- 1.7 **The EYEC sector is characterised by distinctive features which shape competition and outcomes for families.** In particular, the government funding model, local authorities' administration of funding, and regulatory and legal requirements impact:
 - (a) the cost of accessing childcare for families who are eligible for government-funded hours, which is substantially determined by the level of funding provided by the government (and administered by local authorities); and
 - (b) providers' cost bases, which are mainly driven by: (i) the high - and increasing - cost of employing a skilled workforce to meet legal and regulatory obligations (e.g. staff-to-child ratios, staff qualification requirements, the National Minimum Wage, the National Living Wage and National Insurance contributions); and (ii) premises-associated costs (e.g. business rates and energy bills).
- 1.8 These features make the EYEC sector a particularly demanding operating environment. Providers are endeavouring to deliver affordable and high-quality EYEC under sustained cost and regulatory pressures, a shortage of skilled labour, and against a backdrop of rising expectations and scrutiny from families, the media, regulators and government. These conditions are exacerbated by families' misconceptions around what the government's funding model covers. Contrary to common perception, government funding does not provide "*free childcare*" for eligible families as the funding: (i) is limited to 38 weeks per year (not the 50 weeks most commonly needed by families); and (ii) does not cover consumables, food and extra optional activities.
- 1.9 **Busy Bees welcomes a rigorous, evidence-based market study and stands ready to engage fully with the CMA's process.** In particular, Busy Bees recommends that the market study focuses on areas which are likely to be the most impactful, namely:
 - (a) transparency for families, including ensuring that all stakeholders involved in the delivery of funded entitlements (including central government, local authorities and providers) communicate clearly and consistently about what families are and are not entitled to receive;
 - (b) the funding framework, to make the government funding system simpler, more consistently administered across local authority areas and more accurately reflective of the actual cost of delivering high-quality EYEC; and
 - (c) the regulatory constraints that restrict providers' ability to increase capacity and improve the availability of childcare places across England.

2. **The suggested scope of the study is appropriate and should assess evidence in the context of the EYEC sector's distinctive characteristics**
- 2.1 **Busy Bees considers that the proposed scope matches the CMA's stated aim** of assessing how the EYEC sector in England is working and identifying potential improvements. As identified in the Statement of Scope, there is a wide range of providers required to register with Ofsted and eligible to deliver funded hours. These providers are, in many respects, substitutable, and it is common for families to draw on multiple forms of childcare simultaneously and/or sequentially. For example, a family may use a childminder for two days per week and a nursery for the remaining three and/or switch to a local school-based provider for their child's final year before school.
- 2.2 **Similarly, Busy Bees agrees that the devolved nations are appropriately excluded** from the scope of the study. As the Statement of Scope itself recognises, there are substantive differences between England and the devolved nations in relation to the design of government support, the regulatory frameworks and supply-side characteristics. Those differences make any direct comparison unreliable and mean that conclusions derived from an assessment of the EYEC sector in England would not be automatically applicable to Scotland, Wales or Northern Ireland without further investigation.
- 2.3 In conducting its analysis, **the CMA should ensure that the evidence it gathers is representative and takes into account the distinctive characteristics of the EYEC sector.** In particular, the CMA should:
 - (a) **Ensure the study's evidence base reflects the full provider landscape.** The evidence base must reflect the genuine diversity of the sector rather than concentrating disproportionately on a narrow subset of providers. The top 25 nursery groups account for around 10% of registered childcare places in England based on the services in scope of the study.³ Any analysis that over-indexes on this cohort risks generating conclusions that are not representative of the EYEC sector in England as a whole. This risk is heightened if the study forms its initial conclusions based on information from certain provider groups because information from others (e.g. school-based providers) is not immediately available (e.g. due to holidays).
 - (b) **Avoid generalisations based on providers' common characteristics, including type and/or size.** The study should assess each provider's conduct, commercial model and impact on market outcomes in its own right, without extrapolating from the behaviour of one provider - or sub-category

³ The estimated number of registered childcare places in England in 2025 was 1,620,800 (see [DfE \(2025\), Childcare and early years provider survey, section 2](#)). The estimated number of places provided by the top 25 nursery groups in 2026 is 176,343 (see [Nursery World - NURSERY GROUPS REPORT 2026: New order - sizing up the UK's largest nursery groups - Nursery World](#)).

of provider - to others who may appear superficially similar. For example, size or type of ownership is not a reliable proxy for approach, ethos and/or outcomes: providers of similar scale can operate in materially different ways with materially different competitive propositions and outcomes for families and children.

- (c) **Select competition metrics appropriate to this sector and interpret them in light of the distinctive characteristics of the EYEC sector.** In commoditised markets where competition is primarily price-based - such as energy and insurance - consumer switching rates are a conventional and appropriate indicator of market health. The EYEC sector is fundamentally different in character. It is a service where the trusted relationship between provider and family is itself a valued and significant component of the service, similar to certain healthcare and professional services. To the extent they do exist, the CMA should not treat low switching rates as indicative of market failure: as with other trust-dependent services, they should instead be interpreted as a marker of market success, including parental satisfaction. Instead, what matters is that, when customers do want or need to switch provider, the process is straightforward and transparent. This is not always the case for those in receipt of government funding due to the way in which funding is administered by local authorities, which is outside Busy Bees' control. For instance, some local authorities will not fund new children and/or accept a change within area after certain points in the term (of which families are generally unaware) and consequently, families receiving government funding may need to synchronise switches with local authorities' timetables or lose out on government funding.
- (d) **Recognise the impact of the government's large and potentially expanding role in funding and the tightly defined regulatory framework on competitive dynamics.** The English EYEC sector is not a conventional consumer market: it is a government-designed system in which private, public and voluntary providers deliver a public service within a tightly defined regulatory and financial framework. This framework - and providers' legal obligations more generally - influence providers' cost bases (e.g. workforce costs driven by staff shortages, staff-to-child ratios, staff training and qualification requirements, the National Minimum Wage, the National Living Wage and National Insurance contributions, as well as build costs, inflated by the drawn-out and bureaucratic planning permission process, and business rates). It is important that the CMA conducts its analysis, including its assessment of providers' commercial behaviour and pricing practices, with this context in mind.
- (e) **Apply international evidence with appropriate caution.** Evidence from the devolved nations or other countries may offer useful analytical context,

but it cannot be transposed to the EYEC sector in England without careful account being taken of the structural, regulatory and funding differences that distinguish England from those comparators. For example, the funding system in England is fundamentally different - both in design and level of funding - to other countries. Any international evidence must therefore account for these structural differences before being used to benchmark and/or evaluate provider conduct or market outcomes in England.

- 2.4 **The EYEC sector in England is currently undergoing a period of significant change**, with multiple regulatory and policy reforms either recently implemented, in progress or under active consideration. These include the revised Early Years Foundation Stage (**EYFS**) statutory guidance⁴ and the rapid expansion of the funded entitlement in 2024/2025, the Department for Education's (**DfE**) ongoing consultation on early years funding⁵ and the previous Education Secretary's suggestion that certain elements of funded childcare should be extended to those on benefits.⁶ The sector is still adapting to these reforms and proposals. Against this backdrop, the study should: (i) approach any historic evidence with appropriate caution, recognising that conditions, cost structures and market dynamics are evolving rapidly; (ii) appreciate that recent reforms may not be fully reflected in competitive dynamics yet; and (iii) ensure that its analytical framework remains sufficiently flexible to account for the structural shifts already underway, so that its conclusions and any recommendations remain relevant to the market as it will be, not as it was.

3. **The EYEC sector functions well for most families with a wide range of choices available**

- 3.1 **Busy Bees broadly agrees with the characteristics of a well-functioning market identified in the Statement of Scope.** However, the study should have regard to provider sustainability as an explicit component of its analytical framework from the outset. Financial sustainability is not a peripheral consideration: in a market shaped fundamentally by government funding decisions and multiple onerous regulatory frameworks, providers can sustain operations only where their revenue adequately covers the costs of delivering that service and investing in high-quality EYEC. A market in which providers cannot recover their costs and invest in quality improvements cannot be well-functioning. The consequences of financially unsustainable providers are predictable and directly harmful: reduced availability of places, deteriorating quality, provider exit, increased pressure on families and, ultimately, diminished competition.

- 3.2 **The market currently displays many of the characteristics of a well-functioning market.** The sector is competitive and highly fragmented with

⁴ [DfE, Early years foundation stage statutory framework for group and school-based providers \(13 July 2026\).](#)

⁵ [Early years funding proposed changes to the entitlements funding system consultation.](#)

⁶ [Education Secretary's speech at Ruskin College - GOV.UK.](#)

providers actively competing to attract and retain families and catering to their varying needs. This competitive intensity is reflected in the breadth of provider types operating within the market - including day nurseries, pre-schools and childminders - each offering varied business models (public, voluntary, family-run, independent, private equity-backed and other privately capitalised providers) and varied learning approaches (including play-based, Montessori, Froebelian, Reggio Emilia, forest school and Steiner methods). This diversity is the hallmark of a sector in which competition is functioning as it should.

3.3 Providers are constantly incentivised to improve their offering and compete for families' custom. As an increasing proportion of providers' income is effectively set by government funding decisions - and as schools continue to expand their early years offerings - providers increasingly compete on non-price factors such as:

- (a) **Safeguarding** - first and foremost, families want to be sure that their children will be safe when they entrust them to providers. Robust and thorough safeguarding procedures, safer recruitment processes,⁷ dedicated safeguarding site leads and central safeguarding teams - all of which Busy Bees has invested in⁸ - provide additional layers of reassurance for families. A safeguarding lapse may have an immediate adverse effect on a provider's competitive position and, in serious cases, may necessitate its closure either temporarily or permanently depending on the severity of the incident.
- (b) **Safety and environment** - families require assurance that their child is cared for in a secure, hazard-free environment in which relevant protocols (e.g. hygiene) are consistently and rigorously applied. Similar to safeguarding, a safety incident may negatively impact a provider's competitive position and - in severe cases - result in closure. Busy Bees prides itself on its health and safety record and the high quality of its health and safety management system.⁹
- (c) **Quality of care** - a multi-dimensional competitive parameter comprising:
 - (i) education - providers are legally obliged to deliver early years education which meets the EYFS statutory framework. However, some providers - including Busy Bees with its Bee Curious curriculum¹⁰ - have invested significantly more than others in their educational offering to give children the best start in life. This high-quality education acts as a competitive differentiator;

⁷ [Safer Recruitment: Safer Working Practices Policy Framework - GOV.UK.](#)

⁸ [Safeguarding Children - Child Protection - Busy Bees](#)

⁹ [Let's Be Safe - Health, Safety and Welfare - Busy Bees.](#)

¹⁰ [Bee Curious - Welcome to the Busy Bees Curriculum.](#)

- (ii) staff - staff are key to children's and families' experiences of settings. Providers invest heavily in their staff to ensure appropriate experience levels, strong credentials and ongoing professional development;
 - (iii) extra-curricular activities - families value the breadth of non-academic education that settings offer their child, including sports, excursions in the community, forest school, theatre and museum trips; and
 - (iv) food - good nutrition is important to families as it provides essential building blocks for a child's physical growth and cognitive development. The EYFS statutory guidance covers nutrition,¹¹ but Busy Bees has gone one step further and is the only UK-wide EYEC provider with NHS-accredited menus, offering freshly prepared, nutritious meals made on-site by trained chefs.
- (d) **Reputation** - EYEC has features of both an "*experience service*" - in that quality cannot be assessed by a family until the child is enrolled - and a "*credence service*" - in that quality may never be fully assessed, because it is the child, not the parent, who principally experiences the service. These characteristics mean that providers compete intensely on reputation with signals including: Ofsted ratings, word-of-mouth recommendations (including from family, friends and online reviews) and in-person visits to the setting. Providers' responsiveness, transparency and engagement with families throughout their child's early years education are central to reputational positioning and, accordingly, to competitive outcomes.
- (e) **Facilities** - families place material weight on the physical environment in which their child is cared for. Adequate indoor space for safe play and outdoor space - which is particularly sought after in urban settings - are significant differentiators between competing providers.
- 3.4 Notwithstanding the competitive intensity described above, there are particular areas that the study should explore, specifically: (i) information transparency; (ii) availability of childcare, particularly in geographic "*cold spots*" where supply is materially constrained; and (iii) the funding system and regulatory frameworks. Each of these areas is considered in turn below.
- 4. Transparency enhances trust and ensures families can make the best decisions for their children**
- 4.1 Clear, easily accessible information on quality, terms and pricing is key for informed consumer decision-making. Families require comprehensive information on

¹¹ [Early Years Foundation Stage nutrition guidance.](#)

providers' offerings and their ultimate cost (taking into account any government funding), to assess the most suitable early years setting(s) for their child. Without this information, they cannot make effective comparisons or confident decisions.

- 4.2 For Busy Bees, clear communication not only facilitates families' decision-making but also enhances their experiences, building and sustaining the trusted relationships between providers and families which underpin high-quality EYEC. This has been an important focus for Busy Bees, and consequently **Busy Bees has invested significantly in the quality, accessibility and clarity of its customer communications**. Busy Bees' communications are drafted in plain English, and information is presented in a clear and consistent format across its centres. For example, a standardised itemised fee sheet, designed in compliance with the April 2026 Early Years and Childcare Statutory Guidance,¹² is used uniformly across all Busy Bees centres.
- 4.3 To ensure that families can access comprehensive and digestible information about its offering, **Busy Bees has invested significantly in giving families multiple information resources** covering:
- (a) funding, including a dedicated government funding page (available to all families, not just those with children at Busy Bees) - the most visited on the Busy Bees website - which provides a downloadable funding guide,¹³ links to government resources, funding eligibility criteria and information on how to apply;
 - (b) the quality of care, including via the Busy Bees App¹⁴ (accessible to registered families pre-joining) and the Parent Pack;¹⁵ and
 - (c) fees, including a nursery fee calculator¹⁶ and instructions on how to obtain Busy Bees' fee sheets and information on food and consumables.
- 4.4 However, it is likely that more could be done across the sector to improve transparency and enhance communication. Fees in particular could be clarified at the government, local authority and provider levels. For instance, **the funding entitlement has consistently been characterised, including in government communications, as providing "free" childcare. This positioning is a mischaracterisation**: if stretched over the 50 weeks of the year when most families need childcare, government funding covers 22.8 hours per week and does

¹² [Early education and childcare - GOV.UK](#).

¹³ This guide simplifies information on the funding framework, clarifying what government funding does and does not cover and which schemes families may be eligible for (see [funding-guide-jan-26.pdf](#)).

¹⁴ The Busy Bees App provides real-time information on a child's day, connects families with care providers, facilitates the completion of administrative tasks (e.g. booking settling-in sessions, paying invoices, etc.) and contains information on fees, including terms and conditions (see [Busy Bees App Parent Guide](#)).

¹⁵ [Request a Parent Pack - Get to Know Busy Bees - Busy Bees](#).

¹⁶ The calculator enables families to calculate their total potential childcare costs including add-ons (e.g. consumables, meals and snacks, etc.) and relevant funding (see [Nursery Fee Calculator | Calculate Childcare Fees & Funding](#)).

not cover consumables, food and extra optional activities (e.g. events, celebrations and specialist tuition).¹⁷ This inaccurate positioning: (i) generates unrealistic expectations that undermine families' ability to plan effectively for the cost of childcare; (ii) makes comparisons between providers more difficult; and (iii) creates avoidable friction between families and providers at the outset.

- 4.5 Given that families can find fees and funding confusing, improvements could be made sector-wide to how providers: (i) provide clear, accessible explanations of the funded entitlement schemes for which families may be eligible and the process of applying for them; and (ii) present clear fee information on landing pages, with indications of what add-ons cover and how they will be charged. Similarly, local authorities could do more to inform families of their local funding rates, what they do and - more importantly - do not cover and any qualifications (e.g. around when the funding does and does not take effect, such as outside of term-time).

5. Barriers to entry and expansion in the sector are generally low but there are "cold spots" where structural factors result in undersupply

- 5.1 The diversity and scale of participation in the English EYEC sector detailed above is itself indicative of generally low barriers to entry. However, there are two areas which merit closer investigation:

- (a) so-called "cold spots" where there is a shortage of places, particularly for families with certain requirements (e.g. particular working hours, affordability and other needs including special educational needs and disabilities (**SEND**)). In these locations, barriers to entry and expansion may be higher due to location-specific factors (see paragraph 5.2 below); and
- (b) operational and regulatory burdens which could be lessened to encourage entry and expansion across England. For instance, the relevant regulatory and funding frameworks could be simplified (see **Section 6** below).

- 5.2 In "cold spots" with localised undersupply - whether because of a general shortage of childcare places or a limited availability of certain types of provision (e.g. SEND) - the principal drivers are commonly structural, including one or more of the following:

- (a) **Workforce availability:** qualified staff shortages represent one of the most significant and persistent constraints on providers' ability to expand capacity. This constraint originates in: (i) the qualification thresholds required for staff to count within EYFS ratios, which limit the pool of eligible workers; and (ii) the fact that the EYEC sector competes for that restricted pool against other professions (e.g. retail). Staffing shortages are

¹⁷ [Easy explainer: early years funding rates - GOV.UK](https://www.gov.uk/guidance/early-years-funding-rates).

particularly acute in areas with high living costs and in deprived or rural areas where transport links are limited and recruitment catchment areas are compressed. Shortages may also restrict provision where there is pressure on SEND places, which - depending on a child's Education, Health and Care Plan (**EHCP**) - may require a higher staff-to-child ratio, including one-to-one care. Where providers cannot recruit and/or retain permanent staff at sustainable cost, they are obliged to rely on agency workers, whose cost per hour may be materially higher than that of permanent employees. That additional cost burden directly erodes the financial viability of a setting and can deter entry in already underserved areas.

- (b) **Premises availability and/or limitations:** in certain locations, an insufficient supply of appropriate commercial premises can make entry and expansion more difficult. Even where suitable land or buildings are identified, the planning consent process - together with build or fit-out costs and timelines (in some cases more than 18 months) - can be lengthy and burdensome. Furthermore, available premises may not be suitable for certain types of provision. For example, providers may be restricted from making the necessary adjustments to listed buildings for children with physical disabilities, while other settings may not have the space and/or layouts required to accommodate SEND children (a growing concern when SEND demand is increasing significantly year-on-year).
- (c) **The funding framework and its inconsistent application by local authorities:** these elements create significant regional variation across England and unpredictability, making it less attractive for providers to operate in certain areas. For example:
 - (i) there is variation in how local authorities use their discretion over supplementary payments - covering deprivation, rurality, flexibility, quality and English as an Additional Language factors, capped at 12% of the core funding allocation - and how much funding is retained for certain administration (often 3-4% of total funding).
 - (ii) under the DfE's Local Authority Funding Operational Guide, local authorities exercise substantial discretion over the application of the funded entitlement framework, including in relation to funding formulae, disapplication requests and the administrative retention of funding. In practice, however, the manner in which individual local authorities exercise those powers is not always consistent, predictable or transparent. Unpredictability in the funding environment can deter entry and expansion by providers.
- (d) **Demand-side characteristics:** in a small number of areas, the commercial case for entry is weakened by demand-side features. For example, in some

areas, a shortage of places may be driven by families' scheduling requirements. Changing working patterns have created excess demand for midweek days, with more families wanting to consolidate on common days of the week (Tuesday, Wednesday and Thursday). Monday and Friday have the lowest participation rates as families often rely on alternative childcare arrangements on these days (e.g. family care). This feature gives the impression that there is a shortage of places - for instance via inflated waiting lists - when the issue is in fact staff and premises shortages and/or limitations which prevent providers from being able to offer families EYEC for all their preferred days.

- 5.3 The market study should investigate these elements in greater depth to understand the extent to which they individually or cumulatively create "*cold spots*" - particularly in certain geographic areas and among specific customer groups - and formulate proportionate recommendations accordingly.

6. The study should examine facets of the regulatory environment to ensure optimal outcomes for families and providers

- 6.1 The delivery of EYEC is principally shaped by government policy and funding, local authority funding administration and regulatory requirements. This means providers can only deliver sustainable, affordable, high-quality EYEC within the policy and funding frameworks established by government and local authorities. Any commercial and operational decisions that providers make - including decisions about where and how to operate - are necessarily made within those externally imposed parameters.

- 6.2 **The current funding framework is unduly complex for families and providers alike.** Families must navigate multiple, overlapping entitlement schemes (working parent entitlement, disadvantaged two-year-old entitlement, universal and additional hours, Tax-Free Childcare, Universal Credit childcare), each with different eligibility criteria, application routes and administering bodies. Families may be unaware of the full range of schemes to which they may be entitled, or unable to identify the correct application route without professional or provider assistance. Furthermore, the system is constantly evolving, which requires families (and providers) to keep abreast of developments, making it more difficult to use. The DfE itself recognises that the system is "*complicated*" and the fact that support comes from different parts of government "*can make it confusing for both parents and early years providers to understand and apply for the help available*".¹⁸

- 6.3 **At the provider level, the complexity of the funding framework manifests differently but with equally material consequences.** Providers must reconcile a two-tier system in which nationally determined funding rates are redistributed

¹⁸ [Giving every child the best start in life](#), p.23 and p.25.

through local authority formulae that differ in structure, supplement composition and administrative retention. The result is an environment that is, for many providers, inconsistent and difficult to forecast with confidence. This unpredictability hinders investment in quality and capacity. Restrictions on providers' ability to charge for ancillary costs and services (e.g. materials),¹⁹ which limit the extent to which providers can bridge the gap between funded rates and the actual cost of delivery, compound this difficulty.

- 6.4 **Funding complexity falls hardest on the families the system should protect most.** For families of SEND children, the funding landscape is harder to navigate: entitlement funding sits alongside the Special Educational Needs Inclusion Fund, Disability Access Fund, and - for those with an EHCP - High Needs Block funding, each with distinct eligibility tests and application processes, some administered centrally (e.g. deprivation-linked supplements) and others requiring individual application by families or providers. Families awaiting an EHCP, or facing language or literacy barriers, are particularly exposed to this complexity, and the practical effect is that access to support depends heavily on a family's or provider's capacity to navigate the funding system. The study should examine what more local authorities, government and providers could do to close this gap.
- 6.5 **Other regulatory burdens can hinder providers' operational dexterity.** Beyond the funding framework, the regulatory environment imposes a cumulative operational burden on providers which, when combined with slow administrative processes, results in costs and inflexibilities that may be disproportionate to the relevant regulatory objectives. This area, particularly the proportionality of the applicable regulatory frameworks, merits closer scrutiny.
- 6.6 The study should focus on opportunities to improve the overall funding system through greater consistency, centralisation (in some cases), simplification, digitalisation and clearer accountability. It is also critical that funding consistently reflects the actual cost of delivering high-quality EYEC and the system should recognise this (e.g. taking into account inflationary cost pressures). The study should also examine whether regulatory burdens can be designed more proportionately to lessen their impact on providers' operational flexibility.

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¹⁹ [Early education and childcare - GOV.UK](#), at A1.38.

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