

Hi,

I am responding to the CMA's call for views on the proposed scope of the childcare market study. I write on behalf of tiney, the UK's largest childminding agency, of which I am co-founder and CEO.

Our main concern is that the Statement of Scope repeatedly uses data that refers only to Ofsted-registered childminders, while describing them in broad terms as "childminders". This excludes thousands of agency-registered childminders, who represent the only part of the childminding sector that is currently growing.

This issue appears in several instances in the Scope, including points 3, 17, 18 and 20, as well as the table on page 8. In each case, the figures cited relate solely to Ofsted-registered childminders, but are presented as if they represent the whole childminding sector.

We believe the market study will be significantly strengthened by explicitly considering agency-registered childminders within its scope and treatment of data.

Our childminders are successful micro-entrepreneurs earning professional income (averaging over £40k) while delivering high-quality, affordable care. The growth of this part of the market must be understood if we want to expand childcare provision effectively. In addition, some regulatory and local authority challenges vary depending on registration route. For example, agency-registered childminders must pay the full cost of their regulation, while no other provider does.

Recognising the differing recruitment and retention trends within childminding - and what holds further growth back - is essential to understanding the broader market.

I've attached a PDF which offers further data and reflections on what is and isn't working within the childcare sector from a childminder agency point of view.

Very best,



CEO of tiney

Founder of Teach First

Competition and Markets Authority - childcare market study

Submission by Tiney

1. About tiney

tiney is an Ofsted-registered childminder agency reinventing childcare by recruiting, training and supporting early years educators to give children a great start in life. Our mission is to make the highest quality childcare accessible to more families, and to empower a generation of micro-entrepreneurs to deliver amazing care from their own homes. tiney home leaders are registered childminders but receive an unmatched level of support, training, educational expertise, as well as being part of a supportive community all committed to excellence in early years.

tiney delivers its mission through a tech-based approach aimed to enhance the experience of childminders and parents alike. Through a centralised digital platform, our applicants complete 50+ hours of comprehensive digital training in EYFS, paediatric first aid and safeguarding, as well as undergo enhanced DBS checks. tiney provides one to one support throughout the process, along with business coaching, marketing materials and guidance to help secure customers, as well as back office support to manage all the paperwork, billing, contract and customer support through the tiney app. A key benefit is engagement with a collaborative community of other tiney home leaders. Parents benefit as they are able to access quality-assured childcare and monitor their child's early years experience online through an easy to use app.

We are responding to the CMA's call for views based on our work with thousands of childminders across England, and our experience as the UK's largest and fastest-growing childminder agency.

State of childminding

High-quality childminding delivers strong outcomes, particularly through consistent one-to-one relationships, secure attachments and tailored support for communication, behaviour and routines, all of which underpin school readiness. Childminding is also typically [15%](#) cheaper than nursery care, and offers wraparound hours that better suit shift workers and work-from-home parents. In deprived areas, it is often the only viable option; the majority of

children cared for by tiny childminders come from the most deprived half of areas in England by IDACI (around ten percentage points above the sector average). Yet the sector's decline means these benefits are increasingly out of reach.

Childminder numbers have plummeted by 50% over the past decade, with nearly [30,000](#) leaving the workforce. Once the UK's [largest](#) source of childcare, childminding has consistently been overlooked, undervalued, and under-supported by policymakers. In the run-up to the funded hours expansion, for example, it was established that the sector would need an additional 40,000 early years professionals. Despite this, recruitment efforts remain focused almost entirely on nurseries.

France has seven times the number of childminders despite similar demographics. The UK can and should aim higher.

The role of CMAs

Childminder agencies (CMAs) are the only part of the sector experiencing growth. In 2025, tiny recruited nearly half of all new childminders in England. Our model shows that with the right support (training, community, and tech) childminders can earn a professional wage (£40k, on average) and deliver high-quality care.

A recent survey of the general public conducted through Childminding2030 (a recruitment campaign led by tiny) found that the majority of adults would consider retraining as a childminder if more support were available.

We know from daily conversations with prospective childminders and our wider community that the level of support offered by agencies (compared with Ofsted) is a key driver in whether people feel able to enter and stay in the profession.

Yet CMA-registered childminders are often left out of workforce conversations and agencies are rarely recognised for their proven effectiveness in recruiting and supporting new childminders.

Furthermore, CMA-registered childminders suffer a number of penalties specific to their registration route e.g., they are the only educators who must pay the full cost of their regulation

(around £800–£1,000 per year) while other providers receive this support free. This regulatory tax is a major deterrent in an otherwise attractive pathway.

Additional structural barriers facing childminders

Prospective and existing childminders face a range of **structural barriers** that prevent them from entering or staying in the workforce. These include:

- **Landlord and local authority permission** is required to operate from rented homes, disproportionately affecting those in lower-income areas. Failure to obtain this permission is routinely cited as a key reason for prospective childminders exiting the tiny training process. We calculate that this robs the country of tens of thousands of childcare places each year
- **Funded hours for related children** Childminders in England are barred from claiming funded hours for related children, even if they live in a separate household. This policy – unique to England and not applied to nursery staff – deters experienced professionals, especially grandparents, from entering the workforce. PACEY [estimates](#) that over a third of childminders care for a related child and lose up to £5,000 per year per place.
- **Wear and Tear Allowance** Changes to how Wear and Tear Allowance is claimed risk making self-employment untenable for many childminders
- **Practical support for non-domestic childminding** Recent regulatory changes allow childminders to operate from non-domestic premises, including schools. However, insufficient awareness, narrow eligibility criteria, and tight funding deadlines mean many schools haven't engaged. This blocks childminders who could otherwise scale their business on larger premises and offer much-needed childcare support to teachers and local parents

Local authority barriers

Many delivery challenges stem from inconsistent local authority systems. tiny conducted an audit of all English local authorities and found severe fragmentation which hampers recruitment and viability.

Issues identified include:

- **Outdated IT** - Some providers often face broken links, outdated PDFs, or locked drives, whilst others enjoy streamlined portals
- **Contradictory local guidance** - Several LAs publish rules that conflict with Department for Education guidance, including on allowable charges, required documentation, and contract terms. This risks providers unintentionally breaching rules they believed they were following.
- **Mid-term placement delays** - Children who start after the headcount date often go unpaid until the end-of-term adjustment, leaving providers without income for months
- **Blocked CMA involvement** - In several LAs, CMAs are refused permission to support childminders in funding agreements or communications, despite statutory guidance allowing this.
- **Incorrect information on LA websites** – Many councils still state that all childminders must register with Ofsted (which hasn't been true for nearly a decade) and omit any mention of CMAs. This misinformation may actively deter prospective childminders and limit visibility of alternative routes into the profession.
- **Council-owned housing barriers** - Prospective childminders often wait months for permission to work from home, even when the landlord is the council itself. In many cases, the answer is a blanket 'no.' This shuts down viable settings before they've even started.

Recommendations to improve the market and grow childminding numbers

- **Remove landlord permission requirements for childminders in rented homes** to unlock tens of thousands of potential childcare places by removing a policy barrier that disproportionately affects low-income areas. This change would be cost-neutral and immediately impactful.
- **Amend the Childcare Act 2006** to allow childminders to claim funded hours for non-residing relatives. This rule prevents many experienced professionals, especially grandparents, from running viable childcare businesses. Reforming it would unlock thousands of new places, support intergenerational care, and encourage a skilled, motivated cohort to enter the workforce.
- **Fund CMAs to scale recruitment and support** CMAs have proven success rates and can deliver better outcomes than generic marketing campaigns.

- **Remove the CMA regulatory tax** No childminder should pay the full cost of their own regulation. Either cover CMA costs centrally (as with Ofsted) or issue vouchers that childminders can use with either regulator.
- **Elevate the status of childminding through targeted campaigns and career pathways.** Include childminders in all national childcare messaging. Promote routes into the profession that offer fair pay, training, and community support.
- **Pause Wear and Tear Allowance changes** The Government should pause on Wear and Tear Allowance changes and act on the sector's concerns, giving time for clear guidance and proper preparation.
- **Expand and promote non-domestic childminding routes** especially in schools, by widening grant eligibility, extending deadlines, and providing clear guidance so schools understand the model and its benefits
- **Digitise and simplify access to Provider Agreements and onboarding materials** to reduce friction and speed up delivery.
- **Update local authority websites to reflect CMA registration routes** to ensure prospective childminders see all available options.
- **Require councils to publish clear, up-to-date guidance for prospective childminders** to support informed entry into the profession.
- **Explore targeted support for families in childcare deserts** e.g., by enabling childminders to operate from council-owned properties