



Scottish Childminding Association



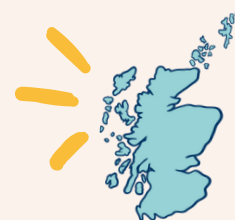
# Early Learning and Childcare Audit 2025

Scottish Childminding Association | December 2025

A comprehensive overview of progress in involving childminders in the delivery of funded ELC, including workforce analysis and future projections.



# Executive Summary



## CHILDMINDERS INVOLVED IN DELIVERING FUNDED ELC

(as at August 2025; based on returns from 30 out of 32 local authorities)

- the number of childminders involved in delivering funded ELC has increased in both age categories:
  - 229 childminders (8% of the childminding workforce) are now delivering funded hours to Eligible Two Year-Olds - an increase of 72 childminders in the last year; and
  - 667 childminders (23.4%) are now delivering funded hours to Three and Four Year-Olds – an increase of 74 childminders in the last year.
- however, disparities continue to exist between the number of childminders approved by local authorities to deliver funded ELC and those actually delivering:
  - 31.2% of childminders (n=890) have been approved for Eligible Two Year-Olds, but only 8% (n=229) are actually delivering; and
  - 31.2% of childminders (n=890) have also been approved for Three and Four Year-Olds, but only 23.4% (n=667) are actually delivering.

## ADDITIONAL FUNDED ELC CURRENT ISSUES

- 25 out of 30 (83%) responding local authorities now pay childminders delivering funded ELC monthly or every four weeks to support their business sustainability.
- 65 deferred children were reported in childminding settings, a small increase on last year.
- Only one local authority has reported stopping taking on new providers and stopping cross-boundary placements due to budgetary pressures (no change since 2024), but the number of local authorities who were uncertain if they may need to do similarly in future has reduced.

## CHILDMINDERS' EXPERIENCES OF DELIVERING FUNDED ELC (snapshot survey August – September 2025; 346 responses / 32% of childminders involved in funded ELC)

- Three and four year-olds (full 1140) remains the most common delivery model (72%) for childminders delivering funded ELC, followed by Three and Fours (blended) (59%).
- 61% of childminders reported that none of the parents of funded children in their settings had been offered their funded hours with a childminder by their local authority – instead, parents had to request this.
- Aspects of delivering funded ELC which continue to provide a poor experience for childminders: 78% believe ELC offers to parents need to be more flexible; only 32% believe there is a strong match between ELC offers and parents' requests; only 26% believe there is a strong match between ELC offers and their business needs; and only 23% believe local authorities have been effective in promoting their childminding service equitably alongside their own nursery provision to parents as an option for receiving their funded hours.
- More positively: 81% believe delivering funded hours is important for their business sustainability; 77% believe this has increased the attractiveness and competitiveness of their business to parents; 82% are satisfied with their experience of delivering funded ELC; and 71% would recommend doing so to other childminders.
- While over 80% continue to report that delivering funded ELC has increased the level of paperwork, the likelihood of this causing childminders to stop delivering has reduced.

## WORKFORCE TRENDS & PROJECTIONS (year to 31 July 2025)

- The childminding workforce declined by 6% (with the loss of 181 childminding businesses) in the year to 31 July 2025, but the decline is slowing and is at its lowest rate of decline since 2016.
- The decline in the workforce since 2016 had been projected to reach -56% by July 2025, without intervention, but has been slowed by 8% to -48%; in human terms, 604 more childminders are in the workforce than projected following targeted action on recruitment and retention since 2022, with early small signs of recovery reported in 2023 and 2024 now becoming more pronounced.



# Early Learning & Childcare (ELC) Audit 2025

## Introduction

In 2016 the Scottish Government published a blueprint which committed it to almost doubling the statutory entitlement of funded Early Learning & Childcare (ELC) for all parents of eligible two year-olds and all three and four year-olds in Scotland to 1140 hours per year by August 2020<sup>[1]</sup>. This deadline was then extended to August 2021 due to the pandemic.

During expansion of the statutory entitlement, SCMA has been commissioned by the Scottish Government to undertake an annual independent audit of local authorities' progress in including childminders in delivering funded ELC. SCMA's audits have become a valued independent source of childminding-specific data on funded ELC.

## SCMA ELC Audit 2025

The ELC Audit 2025 was conducted from 25 August – 30 September 2025 and is based on children receiving funded ELC in childminding settings as at August 2025. Returns were received from 30 out of 32 local authorities in Scotland (94% response level), confirming that SCMA's ELC Audits continue to experience a high level of local authority support and engagement. The response level was consistent with our last ELC Audit conducted in 2024, although with two different local authorities not submitting returns in 2025<sup>[2]</sup>.

As our Audits have progressed and we have moved further beyond implementation of 1140 hours we have widened data collection beyond the earlier measures to also include more practical post-implementation issues experienced by childminders involved in funded ELC.

In parallel, the ELC Audit 2025 continues to provide our in-depth analysis of childminding workforce trends, including our latest, updated workforce projections (first introduced in 2022).



[1] Blueprint for 2020: The Expansion of Early Learning and Childcare in Scotland, Scottish Government, October 2016

[2] Early Learning and Childcare Audit 2024, SCMA, December 2024

# ELC Audit 2025: Main Findings

(based on returns from 30 local authorities)



## CHILDMINDERS INVOLVED IN FUNDED ELC

The statutory provision of 1140 funded (free) hours of ELC takes the form of a universal offer for all three and four year-olds in Scotland and a targeted offer for eligible two year-olds (low income or vulnerable children – approx. 25% of two year-olds). SCMA's ELC Audit measures local authority progress in including childminders in the delivery of funded ELC in both of these age groups. The ELC Audit 2025 found that:

- **the number of childminders involved in delivering funded ELC has increased in both age categories since our last ELC Audit in 2024:**
  - 229 childminders (8%) are now delivering funded hours to eligible two year-olds in 2025 compared to 157 (5.2%) in 2024 – an increase of 72 childminders in the last year; and
  - 667 childminders (23.4%) are now delivering funded hours to three and four year-olds in 2025 compared to 593 (19.5%) in 2024 – an increase of 74 childminders in the last year.

**Table 1: Summary of Main Findings**

**SCMA ELC Audit 2025: summary of main findings**

ELIGIBLE TWO YEAR OLDS									
	CHILDMINDERS APPROVED			CHILDMINDERS DELIVERING			CHILDREN PLACED WITH CHILDMINDERS		
	2024	2025	Change	2024	2025	Change	2024	2025	Change
Numbers	962	890	(-) 72	157	229	(+) 72	183	170	(-) 13
Percentage	31.7%	31.2%	(-) 0.5%	5.2%	8.0%	(+) 2.8%			
THREE - FOUR YEAR OLDS									
	CHILDMINDERS APPROVED			CHILDMINDERS DELIVERING			CHILDREN PLACED WITH CHILDMINDERS		
	2024	2025	Change	2024	2025	Change	2024	2025	Change
Numbers	958	891	(-) 67	593	667	(+) 74	1258	1182	(-) 76
Percentage	31.5%	31.2%	(-) 0.3%	19.5%	23.4%	(+) 3.9%			

[Adjusted figures based on a direct comparison of the 26 local authorities who responded to both the 2024 and 2025 ELC Audits are also broadly comparable with the above – within these areas 226 childminders (7.9%) are now delivering funded hours to eligible two year-olds (an increase of 75 childminders on 2024) and 647 childminders (22.7%) are now delivering funded hours to three and four year-olds (an increase of 84 childminders on 2024)].

These increases are encouraging as the number of childminders involved in delivering funded ELC to both age groups has been dropping since implementation of 1140hrs in 2021, when the decline in the childminding workforce was accelerated by the pandemic before action was taken to address this.

**Table 2: Childminders Delivering Funded ELC By Age Group 2021-25**

	Eligible Two Year-Olds	Three and Four Year-Olds
2021	168 (4.1%)	709 (17.5%)
2022	153 (4.3%)	691 (19.2%)
2023	126 (3.9%)	535 (16.5%)
2024	157 (5.2%)	593 (19.5%)
2025	229 (8%)	667 (23.4%)



While some caution is required in reading the figures in Table 2 and attempting to make direct comparisons, due to differences in the number of audit responses received from local authorities in each year, further analysis was carried out based upon the same local authority areas responding in successive years<sup>[3]</sup>. This confirmed the declining trend and when looking in more detail at the movement within childminders delivering funded ELC, this also found that it wasn't just a case of the numbers of childminders who were delivering funded hours reducing - the number of childminders coming into delivery each year was also starting to be overtaken by those ceasing to deliver. This reinforced the need not just to recruit more childminders into delivering funded hours, but also to increase the focus on supporting and retaining existing childminders.

The SCMA ELC Audit has historically captured data on the number of childminders delivering funded ELC under the separate age categories and it is recognised that some childminders may be delivering funded ELC to both eligible two year-olds and to three and four year-olds. As such, the totals for both categories cannot be added together to create a single total. However, the Care Inspectorate captures a singular figure and publishes this within their annual Early Learning & Childcare Statistics. The latest report found that as at 31 December 2024, 1,084 childminding services had been approved to deliver funded ELC and of these 759 (70%) were actually delivering funded ELC<sup>[4]</sup>.

- **disparities continue to exist between the number of childminders approved by local authorities to deliver funded ELC and those actually delivering, most significantly within the priority age group of eligible two year-olds:**
  - 31.2% of childminders (n=890) have been approved for eligible two year-olds, but only 8% (n=229) are actually delivering; and
  - 31.2% of childminders (n=890) have also been approved for three and four year-olds, but only 23.4% (n=667) are actually delivering.

Throughout ELC expansion childminders have consistently reported that these disparities are caused by local authorities approving childminders to deliver funded hours, but then not promoting their services equitably alongside their own nursery provision as an option to parents for receiving their statutory entitlement of funded hours. This is also reflected in our recurrent childminder survey findings (see page 9).



[3] 32 returns were received in 2021 and 2022, 28 in 2023 and 30 in 2024 and 2025.

[4] Early Learning & Childcare Statistics 2024, Care Inspectorate, September 2025



### In parallel:

- uptake of funded hours for eligible two-year-olds continues to be lower than desired for this priority group – the 2024 census found that the uptake for eligible two year-olds was only 59% compared to 94% for three and four year-olds<sup>[5]</sup>.
- looking at the proportion of services providing to different age groups, Care Inspectorate data reports that childminders continue to be the highest provider type delivering care for 6-12 months (84.6%), one-year-olds (88%) and two-year-olds (90.9%)<sup>[4]</sup>.

As such, it is clear that childminders have much experience to offer two year-olds and that the disparity between the number of childminders approved and actually delivering funded hours to eligible two year-olds continues to present a missed opportunity in increasing uptake.

SCMA has previously recommended the need for joined up action between the Scottish Government, local authorities and SCMA to address this.

- **while the number of childminders delivering funded ELC has increased, the number of children receiving funded ELC in childminding settings has reduced. 170 eligible two year-olds (compared to 183 in 2024) and 1182 three and four year-olds' (compared to 1258 in 2024) were recorded as receiving funded ELC from childminders in August 2025.**



[4] Early Learning & Childcare Statistics 2024, Care Inspectorate, September 2025

[5] Summary statistics for schools in Scotland 2024, Scottish Government, 10 December 2024

# Funded ELC: Additional Current Issues

## Frequency of payment to childminders

For context: frequency of payment by local authorities to childminders delivering funded ELC has previously been reported as inadequate, variable and, in some cases, not supporting business sustainability (a requirement within the National Standard for ELC which all funded/partner providers are required to demonstrate):

- 25 out of 30 responding local authorities (83%) now pay monthly or every four weeks, recognising the importance of regular payment to childminders' business sustainability as low-income small businesses and the parallel requirement placed upon them as partner providers under the National Standard to demonstrate their business sustainability. While additional detail was not requested beyond frequencies of 'fortnightly', 'monthly' or 'termly', data captured found this involves a mix of 'monthly', 'monthly (in advance)', 'every four weeks' and 'every four weeks (in advance)'. One local authority provides childminders with a choice of monthly or termly payment;
- The remaining five responding local authorities (17%) pay termly / three times in a year (mixture of in arrears or advance).

## Impact of the deferral year

For context: childminders had reported anecdotally that they were experiencing an increase in parents choosing to defer their child starting primary school, due to a combination of payment for funded ELC during the deferral year being confirmed by the Scottish Government and parental concerns that child development had been delayed by the pandemic:

- a total of 65 deferred children accessing funded ELC in childminding settings was recorded (up slightly from 60 in 2024);
- 8 local authorities who responded (27%) reported that this represented an increase on 2024, 19 (63%) reported no change and two (7%) didn't know if there had been a change.

## Impact of local budgetary pressures on funded ELC provision:

For context: a number of local authorities had been experiencing severe budgetary pressures at a time when ringfencing of Scottish Government funding provided to local authorities for funded ELC was due to end, causing uncertainty, including amongst childminders and other providers, about what impact this would have on local ELC delivery:

## The Audit tested three impacts:

Has your local authority had to... due to budgetary pressures? (Yes/No)

	Yes	No	N/A	Total
Reduce the level of funded hours offered to parents through childminders	0	30	-	30
Stop supporting cross-boundary placements	1	27	2	30
Stop taking on partner providers	1	29	-	30

As with when we first asked this question in 2024 only one local authority reported that they had stopped supporting cross-boundary placements and also taking on new partner providers due to budgetary pressures. While the position is very consistent nationally about the impact to date, responses were more mixed when looking ahead and asked the same questions.

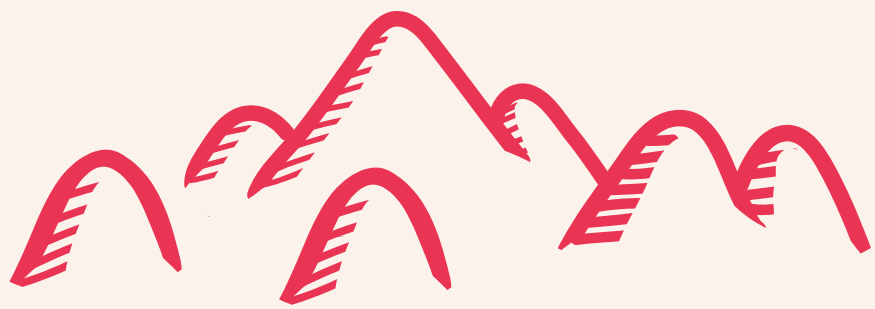
**Looking ahead, do you believe that your local authority may have to ... due to budgetary pressures? (Yes/No/Don't Know)**

	Yes	No	Don't know	Additional/qualified responses received				
				Not at this time	N/A	Unable to comment	Didn't answer	Total
Reduce the level of funded hours offered to parents through childminders	0	25	3	1	-	1	-	30
Stop supporting cross-boundary placements	0	19	5	2	3	1	-	30
Stop taking on partner providers	0	22	6	1	-	1	-	30

Our ELC Audit 2024 was conducted just a few months after the removal of ringfencing of local ELC budgets. At that time, it was very uncertain what would happen next and if more local authorities would follow the single local authority which had stopped cross-boundary placements and taking on new partner providers. This was reflected in the answers to the questions which we asked in our audit.

Looking at the 'no' answers for the last two years, it can be seen that while only up to 50% (n=16) of responding local authorities could confidently state last year that they did not believe they would need to implement these measures, the level of confidence in discounting the need for such measures in future has increased this year:

	No (2024)	No (2025)
Reduce the level of funded hours offered to parents through childminders	16	25
Stop supporting cross-boundary placements	13	19
Stop taking on partner providers	15	22



The full responses containing all answers provided to all audit questions, by local authority, can be accessed in the supporting documents published alongside this main report.



# Childminders' Experiences of Delivering Funded ELC

Since 2021 SCMA has also conducted an annual snapshot survey of childminders involved in funded ELC linked to our ELC Audits to provide a parallel data source from a childminding perspective.

The latest online survey was conducted between 27 August and 28 September 2025. A total of 346 responses were received from childminders (members of SCMA) representing a 32% response level from childminders approved to deliver funded ELC in Scotland. This was broadly consistent with response levels to our previous ELC surveys which have averaged 309 responses in each of the last five years. While this overall number has remained consistent, the balance between childminders approved to deliver and actually delivering funded hours has changed through time.

Given that we now have five years of data since implementation of 1140 in 2021, five-year comparisons are also provided below.

## Main Findings (including data extracts)

Delivery models:

- Full 1140 provision for three and four year-olds remains the most common delivery model for childminders delivering funded ELC (72%)
- Blended provision for three and four year-olds is the next most common (increased to 59%)
- Blended provision for eligible two year-olds is next (increased to 31%)
- Full 1140 provision for eligible two year-olds remains the least common delivery model, but still a slight increase (20%).

Note – some childminders are involved in more than one model of delivery, so were asked to indicate all which applied.

	2021	2022	2023	2024	2025
Eligible Twos blended	20%	26%	24%	21%	31%
Eligible Twos full	6%	11%	9%	12%	20%
Three and fours blended	39%	42%	50%	50%	59%
Three and fours full	79%	71%	69%	72%	72%

## Parents of funded children in setting not offered childminding as an option to receive their funded entitlement by their local authority:

- 61% of childminders who responded advised that none of the parents of children receiving funded hours in their setting had been offered childminding as an option for receiving their statutory entitlement by their local authority – instead, parents had to request this option. This level remains consistently high.

	2021	2022	2023	2024	2025
None	Not asked	61%	64%	55%	61%

## How strong a match childminders believe there is between local authority ELC offers to parents and parents' requests:

- Only 32% of childminders who responded believe there is a 'very strong' or 'strong' match between local authority ELC offers to parents and parents' requests. This continues to be consistently low.

	2021	2022	2023	2024	2025
Very strong	8%	4%	5%	8%	9%
Strong	28%	14%	17%	21%	23%

## How strong a match childminders believe there is between local authority ELC offers and their business needs and viability:

- Only 26% of childminders (or approximately 1 in 4) who responded believe there is a 'very strong' or 'strong' match between local authority ELC offers to parents and childminders' business needs and viability. This continues to be consistently low.

	2021	2022	2023	2024	2025
<b>Very strong</b>	9%	4%	6%	6%	6%
<b>Strong</b>	20%	11%	18%	20%	20%

## The need for ELC offers to be more flexible to meet parents' needs:

- 78% of childminders who responded believe that ELC offers need to be 'much more' or 'more' flexible. This opinion has remained consistently high

	2021	2022	2023	2024	2025
<b>Much more flexible</b>	26%	35%	34%	31%	23%
<b>More flexible</b>	36%	37%	40%	37%	55%

## How effective childminders believe their local authority has been in promoting their childminding service equitably alongside their own nursery provision as an option for parents to receive their statutory entitlement:

- Only 23% of childminders who responded believe their local authority has been 'very effective' or 'effective' in promoting their childminding service equitably alongside their own nursery provision. This experience has also remained consistently poor.

	2021	2022	2023	2024	2025
<b>Very effective</b>	3%	1%	4%	5%	5%
<b>Effective</b>	22%	16%	16%	18%	18%

## If the level of funded hours are high enough to support childminders' business sustainability:

- 33% of childminders (or 1 in 3) who responded believe the level of funded hours which they are delivering is high enough to support their business sustainability, and a further 38% believe this is mixed (ie they may have a number of funded children in their setting, and for some the hours are sustainable but for others, they are not). This represents ongoing gradual improvement.

	2021	2022	2023	2024	2025
<b>Yes</b>	Not asked	16%	20%	32%	33%
<b>A mix (where more than one funded child)</b>	Not asked	41%	41%	35%	38%

### Importance of delivering funded ELC for childminders' business sustainability:

- 81% of childminders who responded believe that delivering funded ELC is 'very important' or 'important' for their business sustainability. This remains consistently high.

	2021	2022	2023	2024	2025
Very important	37%	33%	40%	39%	42%
Important	45%	41%	42%	39%	39%

### Importance of delivering funded ELC in increasing attractiveness and competitiveness of childminders' businesses to parents:

- 77% of childminders who responded believe delivering funded ELC has been 'very important' or 'important' in increasing the attractiveness and competitiveness of their business to parents. This positive reported experience has increased annually.

	2021	2022	2023	2024	2025
Very important	12%	21%	23%	41%	41%
Important	43%	37%	39%	32%	36%

### Impact of delivering funded ELC on childminders' paperwork:

- 82% of childminders who responded reported that delivering funded ELC has had a 'significant increase' or an 'increase' on their paperwork. This experience has remained consistently high.

	2021	2022	2023	2024	2025
Significant increase	42%	41%	42%	37%	38%
Increase	44%	41%	34%	47%	44%

### Increased paperwork and future career intentions:

- 60% of childminders who responded believe it is 'very likely' or 'likely' that they will still be childminding in 2-3 years' time if the level of paperwork doesn't reduce. This represents increasing annual improvement.

	2021	2022	2023	2024	2025
Very likely	Not asked	10%	16%	17%	23%
Likely	Not asked	24%	32%	39%	37%

### Satisfaction with delivering funded ELC:

- 82% of childminders who responded are 'very satisfied' or 'satisfied' with their experience of delivering funded ELC. Barring a slight dip in 2022 the level of satisfaction has increased annually.

	2021	2022	2023	2024	2025
Very satisfied	15%	14%	17%	26%	25%
Satisfied	49%	44%	49%	51%	57%



Recommend to others:

- 71% of childminders who responded would recommend delivering funded ELC to other childminders. This reported finding is at its highest level and has increased annually since 2022.

	2021	2022	2023	2024	2025
Yes	57%	47%	52%	68%	71%



# Childminding Workforce Trends

SCMA has been reporting annually, through our ELC Audits, on the decline in the childminding workforce which has been experienced during ELC expansion and which has had implications for children, families, communities and a range of national policies. The reasons for this decline have been multi-factorial and have previously been explored within our ELC Audits and more fully in our Childminding Evidence Paper<sup>[6]</sup>.

Within the overall decline in the childminding workforce, SCMA has also been tracking the number of new registrations, as new childminders come into the workforce (which had been declining) and the number of cancelled registrations, as childminders have left the workforce (which had been increasing). Recognising that a long-term approach and commitment would be required to address the decline in our workforce, SCMA launched the first three-year stage of a ten-year strategy in May 2021 to strengthen childminding, support families and increase choice<sup>[7]</sup>.

Within this SCMA committed to leading nationally on the development of a sustainable childminding workforce. Since then we have undertaken much work to understand the reasons behind the decline, to continue to strengthen the evidence base on childminding (and its benefits), to strengthen support for childminders and we have undertaken recruitment pilots in order to grow the childminding workforce.

This then led to SCMA delivering the Programme for Scotland's Childminding Future (PSCF), a three-year programme on childminder recruitment and retention predominantly funded by the Scottish Government, which is now in its second year. Further details can be found in our ELC Audits 2022, 2023 and 2024 and on page 15 of this publication<sup>[8,9,2]</sup>.

Our ELC Audits are conducted in August each year and include an analysis of the childminding workforce trends as at 31 July of each year. Our latest analysis, as at 31 July 2025, has found that:

- **the decline in the childminding workforce continued to slow and declined by 6.0% in the last year with the loss of 181 childminding businesses and 1140 spaces for children families.** This compared to -6.5% decline in the year to July 2024, -9.7% decline in the year to July 2023 and -11.5% decline in year to July 2022. Also as the workforce declines, the annual reduction in numbers is presenting as a higher percentage against a smaller workforce number e.g. the 181 lost in the last year represents a 6% loss on the year before, whereas if presenting this annual loss of 181 against the higher workforce in 2016 this would have presented as a 3% loss. As such, more progress in reversing the decline in the workforce is being made than may at first be apparent.
- **since 2016 the childminding workforce has now declined by 48.3%** with the loss of 2664 childminding businesses and 16,783 childminding spaces for families<sup>[10]</sup>.
- **the number of new registrations recorded was 167.** While down a little on last year, this is believed to be a timing issue due to the lead time involved in completing registration with the Care Inspectorate. 73 new childminders recruited via the PSCF had completed registration by the end of July, with a greater number of new recruits still working their way through the system at that time. With this and a higher number of new recruits in Year two (2025/26) also working their way through the system, we anticipate the number of new registrations will increase in the current year to July 2026.
- **the number of cancelled registrations fell to 349 last year – the lowest level since pre-2016,** reflecting the considerable collective efforts made by SCMA, the Scottish Government, local authorities and others in strengthening support for childminders and, where possible, reducing the level of paperwork and duplicative quality assurance which had previously been identified as the main reason childminders were leaving the workforce.

[6] Childminding Evidence Paper, SCMA, August 2022

[7] Changing the Narrative: Strengthening Childminding, Supporting Families and Increasing Choice: SCMA Strategy 2021-24, May 2021

[8] Early Learning and Childcare Audit 2022, SCMA, November 2022

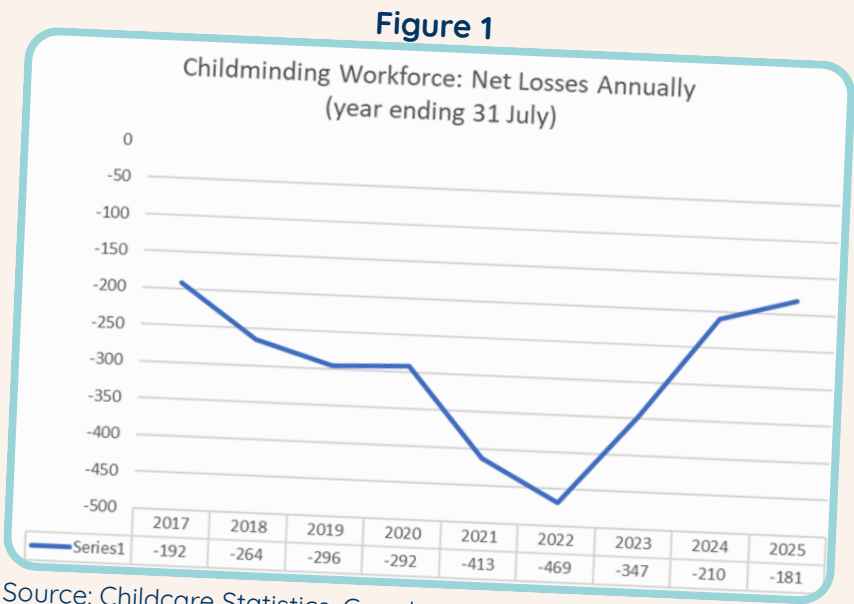
[9] Early Learning and Childcare Audit 2023, SCMA, November 2023

[10] Childminding places based on latest average number of children per childminding setting (6.3), Care Inspectorate, September 2025

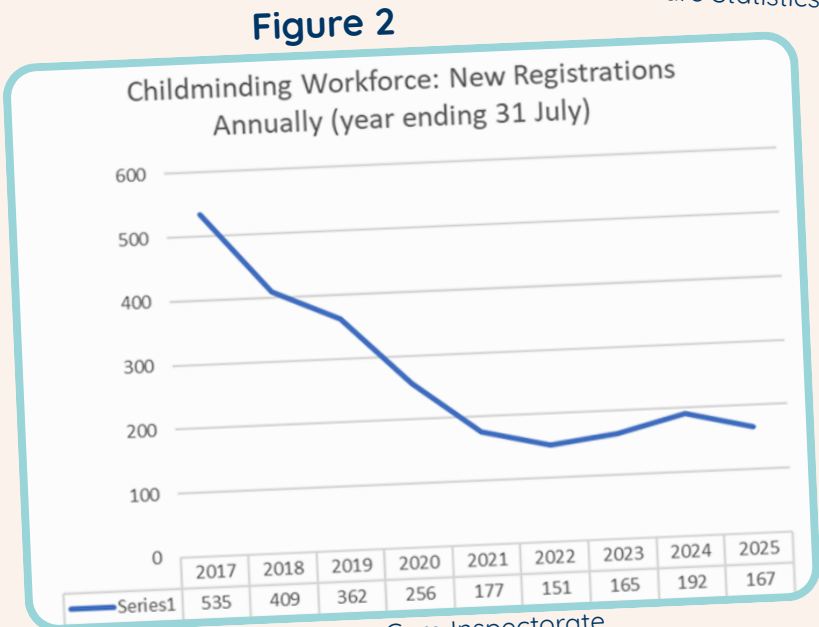


- when then looking at the annual net loss from the workforce it can also be seen that good progress has been made in reducing this from -469 in the year to July 2022 to a net loss of 181 last year.

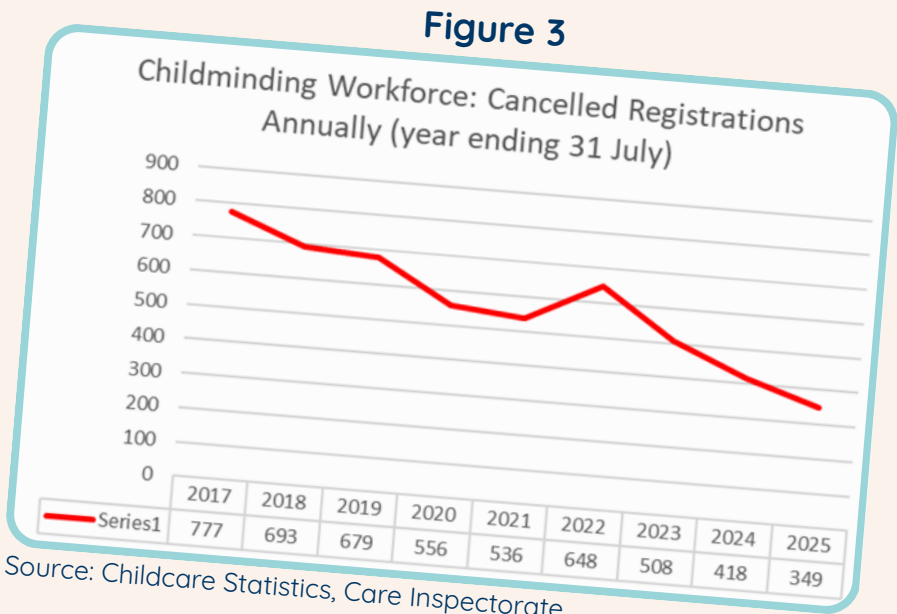
See Figures 1-3 below.



Source: Childcare Statistics, Care Inspectorate



Source: Childcare Statistics, Care Inspectorate



Source: Childcare Statistics, Care Inspectorate

A full breakdown of the trends within the childminding workforce, by local authority area, since 2016 can be accessed in the supporting documents accompanying this report.



# Workforce Projections

Recognising the severity of the decline in the childminding workforce, the adverse impact this was having on children, families and communities, and the need for urgent action, SCMA also began to include workforce projections in our ELC Audit in 2022.

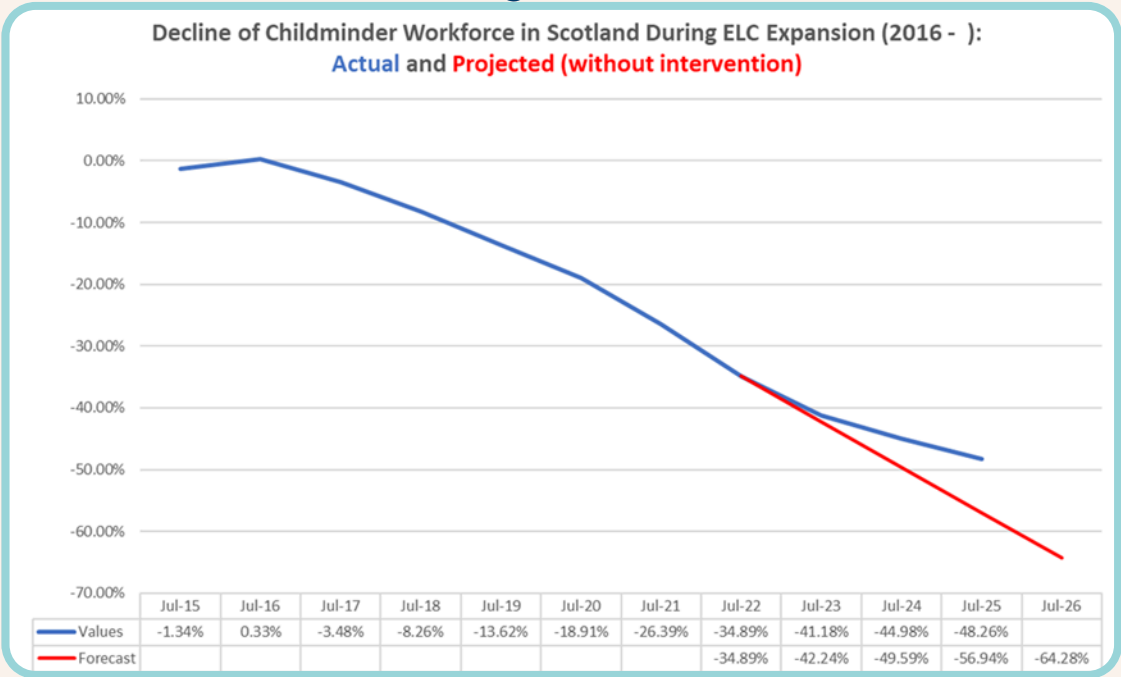
The initial projections were stark and, at that time, projected that the 34% decline experienced up to July 2022 could almost double to -64% in July 2026 without intervention.

Since first publishing our workforce projections in 2022 we have continued to track progress in addressing this decline. Small signs of recovery were identified and reported in our ELC Audit 2023 and 2024. The latest analysis confirms that in the year to July 2024:

- the workforce decline continues to slow with this effect becoming more pronounced in response to intervention. A decline of -48.26% was recorded between 2016 and July 2025 against a projected decline of -56.94%. This means that the actual decline is 8.68% less than projected or in human terms there are 604 more childminders within the workforce than projected due to the combined actions on recruitment and retention. See Figure 4 below for the latest projections.



Figure 4



Source: SCMA projections based on Childcare Statistics, Care Inspectorate

# Programme for Scotland's Childminding Future: Update

The Programme for Scotland's Childminding Future (PSCF) is a three-year national programme of childminder recruitment and retention, predominantly funded by the Scottish Government and delivered by SCMA. This rolling programme was launched in June 2024, with recruitment being undertaken in 17 local authority areas during the first year. Recruitment commenced in the summer of 2024, with the first new childminders recruited by the programme completing registration with the Care Inspectorate by the end of March 2025. The programme has expanded in its second year (2025-26), with 30 local authorities now working in partnership with SCMA to recruit childminders in their areas.

As a form of registered childcare, all childminders are required to be registered with the Care Inspectorate. Once accepted on to the PSCF, the process involves undergoing SCMA's Childminding Induction Support Programme, developing an application to become a childminder (with accompanying policies and documentation) with one-to-one support from SCMA's Workforce Officers. Candidates then submit an application for registration to the Care Inspectorate (which can take three-six months). Upon successful registration, new childminders recruited through the PSCF are then eligible for a Scottish Government funded £750 start-up grant.

## To date:

- **over 3,600 enquiries about becoming a childminder have been received following the marketing campaign.**
- **450 candidates have enrolled on to the programme and have been supported by SCMA's Childminding Induction Support Programme (with 393 already completing it).**
- **89 new childminders have completed their registration with the Care Inspectorate (with 86 of these also having now received a £750 start-up grant and established their new childminding businesses around Scotland).**
- **a further 217 candidates have completed and submitted their applications to become childminders to the Care Inspectorate.**
- **many more are continuing to work through the programme to become childminders and SCMA continue to receive interest from candidates across Scotland.**

The programme also includes a range of measures to address the retention of the childminding workforce, helping to deliver more practical support and ensure existing professionals are supported with their workloads and professional development. Pilots of different models of Funded Time Off the Floor and Mentoring have been established and are underway with childminders in 23 participating local authority areas. Additional quality materials to support childminders' practice have also been made available to the entire childminding workforce across Scotland.



# Conclusions



The production of our annual ELC Audit has become a significant undertaking, but as its scope has grown (beyond local authority audit returns and workforce analysis to also include childminders' experiences, post-implementation issues and workforce projections), so has its value. This can be clearly evidenced by the high level of local authority engagement and by the use of data obtained to positively influence change nationally.

SCMA was first commissioned by the Scottish Government to undertake our annual ELC Audit in 2016 after the Blueprint for expansion was published. During this period the childminding workforce has been in decline and this was accelerated by the pandemic. As such, it has become something of a negative task reporting on this annually and also the subsequent decline in the number of childminders delivering funded ELC as the workforce contracted. However, this started to change as a result of actions which have been taken and in our last two audits (in 2023 and 2024) we started to report on small signs of recovery in the childminding workforce.

Within this last year we have seen these signs of recovery become more pronounced and within this year's audit we have reported on an increase in the number of childminders delivering funded ELC to both eligible two year-olds and three and four year-olds, plus a slowing of the decline in the childminding workforce. This has followed a series of actions on childminder recruitment and retention which are starting to have a positive impact, are currently being driven at pace and scale and on which we expect to report further, more substantive, progress next year. Linked to this, it is appropriate to acknowledge the Scottish Government's support for childminding and SCMA's work, most notably through the ongoing three-year Programme for Scotland's Childminding Future (PSCF) which has created the opportunity for 30 local authorities to engage in partnership working to support childminder recruitment and retention this year. However, it is also appropriate to caution that any lessening of this support for childminding at this critical stage could undermine the progress made and the potential which we are starting to see.

Returning to the main focus of the ELC Audit regarding local authorities' progress in including childminders in delivering funded ELC, it is clear that much progress has been made. In addition to reporting increases in the numbers of childminders participating, it is heartening to report that 83% of local authorities are now paying childminders monthly to deliver funded hours (a simple, but highly impactful measure to support small businesses' sustainability which we need all local authorities to implement); that delivering funded hours has become so valued and important to childminders doing so; and that so many childminders delivering funded ELC are satisfied with their experience and would recommend it to others.

Conversely, it is disappointing that childminders' experiences of funded ELC continue to be so low around the flexibility of offers and how they match parents' or childminders' needs; and it is particularly frustrating that 61% of childminders who responded to our survey have reported that none of the parents of funded children in their setting were offered childminding as an option by their local authority to receive their statutory entitlement of funded hours and had to explicitly request this. Sadly, this and issues around a lack of 'Provider Neutrality' are not a new finding, have recurred throughout ELC expansion and must change.

As with previous audits, we would hope that in addition to updating on the current landscape for funded childminding provision in Scotland, this offers both some grounds for encouragement and a tool to support further quality improvement.

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