Strengthening Early Childhood Education and Care in North Macedonia

Key findings and recommendations

Core message: ECEC expansion should increase places while ensuring equitable, affordable, inclusive and quality access - particularly for Roma children, children with disabilities, low-income families and children in underserved areas.

Context

Early Childhood Education and Care (ECEC) is one of the most important investments in child development, school readiness, social inclusion and long-term human capital development. In North Macedonia, strengthening ECEC is also linked to poverty reduction, women's employment, family wellbeing and social cohesion. The system has expanded over the past decade, but access remains insufficient and unequal. Achieving the national objective of 65 per cent enrolment by 2032 requires a stronger, more inclusive and financially sustainable system.

Key findings

- **Coverage is low and the public-only path is too slow**: More than 79,000 children at 0 to 6 years of age are not enrolled in ECEC. Among children aged 3 to 6, two out of three lack access to ECEC, compared with a European Union average enrollment rate of 95%. Reaching the national target of 65% by 2032 requires around 19,000 additional places. Public ECEC expanded by about 833 places per year between 2020 and 2025; at that pace, reaching the target would take around 23 years. Using the current model of expansion focused only on public facilities would also require hefty investment – 105 million EUR only for ECEC infrastructure, which would entail a fivefold increase compared to the current level of investment.
- **Access gaps are territorial and concentrated:** The official public ECEC waitlist included 4,894 children in October 2025, with the top 10 municipalities accounting for about 80 per cent of the list. At the same time, 6 municipalities lack full public ECEC services or rely on shorter ECD arrangements that do not fully respond to the needs of children and working parents. As a result, coverage by municipality ranges sharply, from 77% to below 10% or none.
- **Financing and affordability limit system diversification:** Private provision remains limited, with only 7% of children attending private kindergartens, while in the EU member states, the share of private providers ranges between 15% and 35%. Private providers can adapt premises faster and at lower capital cost but are financed solely through parental fees and unlike other private providers of social services do not receive any support from the Government. This results in costs being passed on to parents in the form of high monthly fees, which are unaffordable for most households, and limit the potential of the private sector for quicker expansion. Without public co-financing, regulated prices and income-based co-payments, private ECEC would remain unaffordable for many families and could widen inequities.
- **Roma children and children with disabilities face the deepest barriers**: Roma children remain largely excluded from ECEC, with barriers linked to affordability, transport, documentation, awareness, language and concerns about stigma. For children with disabilities, 1,155 children aged 0-6 are enrolled against an estimated need of 5,821; inclusion is constrained by limited screening, weak referral pathways, uneven accessibility, insufficient specialist staff and no disability-adjusted financing. Children from low-income families face similar constraints.

- **Quality, workforce and governance are decisive**: Expansion could weaken quality if it is not matched with workforce planning, recruitment and retention measures, specialist support, inclusive pedagogy, quality assurance and stronger coordination across central government, municipalities, providers and employers.

Key recommendations

- **Adopt a mixed-delivery expansion model with equity safeguards**. Continue public investment in underserved areas, while introduce Government co-financing of private provision, employer-supported models and transitional community-based services as complementary mechanisms. All expansion should be guided by municipal mapping of equity gaps, demand, capacity and barriers affecting vulnerable children.
- **Introduce public co-financing for licensed private providers.** Co-financing should be linked to national quality standards, regulated prices, income-based parental contributions and a guaranteed share of subsidized places for children from low-income households, Roma children, children with disabilities and other priority groups. Government should be ready to cover the same amount of funding per child in private and in public facilities.
- **Strengthen affordability and prioritization.** Institutionalize fee waivers, reduced co-payments, transport support and targeted subsidies. Children from families receiving Guaranteed Minimum Assistance or child allowance should be prioritized in high-demand facilities and supported to enroll and attend regularly.
- **Expand and sustainably finance Roma inclusion measures.** Scale up outreach through Roma mediators, support families with enrolment documentation, provide fee waivers and transport where needed, introduce parenting programmes, train staff in inclusive pedagogy, and use community-based early learning only as a transitional bridge towards full-day quality ECEC.
- **Create a funded inclusion framework for children with disabilities.** Introduce disability-adjusted financing within the public ECEC funding formula; establish mobile specialist teams; strengthen referral and functional assessment pathways; extend support from resource centres to preschool children; upgrade accessibility; and train staff in inclusive pedagogy, communication and early intervention.
- **Enable employer-supported childcare as a complementary pathway.** Develop a clear legal and incentive framework for workplace or near-workplace childcare, co-financed places in licensed providers, and childcare allowances. Employer models should comply with licensing, quality, safety and non-discrimination standards.
- **Strengthen governance, workforce and quality assurance**. Amend legislation to enable co-financing, service contracting and multi-annual arrangements; introduce transparent pricing methodologies and standard contracts; strengthen municipal planning and monitoring; and invest in recruitment, retention and continuous professional development for ECEC staff.

Immediate implementation priorities

- Prepare the legal and bylaw package needed for co-financing of private providers, determining household eligibility criteria, pricing methodology for private ECEC and standard contracts with licensed providers.
- Pilot subsidized places where demand is highest, while reserving places for vulnerable children and monitoring affordability, attendance, quality and parent satisfaction.
- Link ECEC expansion with social protection, Roma outreach and disability inclusion reforms from the start, so that new capacity translates into real participation for children who are currently left behind.

Conclusion

ECEC expansion in North Macedonia should not be understood only as an infrastructure agenda. The priority is to build a stronger system that gives every child the best start in life. Increasing the number of available places is essential, but it will only deliver results if access is equitable, inclusive, affordable and of good quality, with priority given to children and families who currently face the greatest barriers.

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