

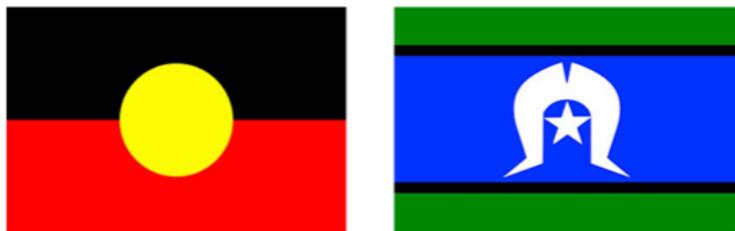
Election 2025

Education Policy Brief: Early Childhood Education & Care

The Mitchell Institute, Victoria University



Acknowledgement of Country



The Mitchell Institute at Victoria University acknowledges, recognises and respects the Ancestors, Elders and families of the Bunurong/Boonwurrung, Wadawurrung and Wurundjeri/Woiwurrung of the Kulin who are the traditional owners of University land in Victoria, the Gadigal and Guring-gai of the Eora Nation who are the traditional owners of University land in Sydney, and the Yulara/Yugarapul people and Turrbal people living in Meanjin (Brisbane).

About the Mitchell Institute

Established in 2013, the Mitchell Institute at Victoria University is a leading policy think tank and research centre. With a focus on education policy, systems and place, we are working towards a fairer and more productive society where every individual, regardless of their background, has the opportunity to thrive.

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Overview

The last few years have seen a range of policy developments in early childhood education and care (ECEC) in Australia. Subsidies have increased for many families, educators have received a pay increase, and access has been expanded through recent ‘Three Day Guarantee’ reforms.

Removing the barriers to accessing care has been central to the most recent policy reforms, signifying that the key legislative foundations for a ‘universal’ system are now in place. Yet ECEC remains in constant flux, with ongoing changes shaping affordability, availability and quality.

As a result, families, providers and policymakers alike are navigating an evolving system that continues to demand attention and action. Debates over fees, workforce shortages and equitable access have kept ECEC consistently high on the policy and political agenda. As the election heats up, the key battles will be over cost-of-living relief on fees and the role of government in shaping the sector.

Of course, ECEC is not just about childcare, or education, it is also about workforce participation, gender equality, the cost of raising a family and the household budget. That is why it has stayed on the political radar since the last election, and why no party can afford to ignore it.

The timing of this election comes at a crucial stage for ECEC in Australia, with the outcome likely to determine whether a universal system becomes a reality.

The major election battleground – fair access or a free market?

The election race is on and the issue of ‘universal access’ – low or no barriers for families accessing ECEC services – is at the centre.

In February, the Albanese Government took a major step towards universal ECEC by guaranteeing every family three days (72 hours a fortnight) of subsidised care, no strings attached. That means no Activity Test, no need to prove work or study — just access. For anything beyond three days, the test still applies.

This move breaks the link between parents' employment status and access to subsidised care, a significant milestone on the path to universal ECEC, as seen in countries such as Sweden and Norway.

The bill passed with strong support: 88 MPs in favour, 53 against, with the ‘no’ votes coming from the Coalition and some independents [1]. Yet even after opposing the measure, Opposition Leader Peter Dutton promised ongoing investment in ‘essential services like childcare,’ while stopping short of committing to expansion.

Meanwhile, Labor’s \$1.03 billion Building Early Education Fund, “the single biggest investment by an Australian Government ever in new childcare services” [2], promises to deliver 160 new childcare centres, mostly on school grounds in regional communities [3]. These areas have long struggled with supply, particularly for First Nations families. The investment includes \$500 million in targeted capital grants and \$2.3 million for the Commonwealth to directly own or lease centres to boost availability.

Expanding the provision of ECEC would increase access in regional communities, but some opposition MPs strongly oppose the policies on the basis of protecting the ‘family unit’ [4].

These debates reveal the many, and often conflicting, values that shape policy on who should care for young children before they start school.

Electoral childcare hotspots

Australia's childcare sector is experiencing an uneven distribution of ECEC services in different regions. In certain metropolitan areas, an oversupply of childcare centres has resulted from minimal barriers to establishing new facilities, causing reduced utilisation rates and financial strain on existing providers.

Conversely, many regional and rural communities continue to face significant shortages, leaving families with limited or no access to childcare services. This imbalance underscores the need for targeted planning to ensure equitable childcare access across the country, a critical aspect of a universal system.

Mitchell Institute analysis [5] shows that the playing field remains particularly uneven in the electorates shown in Table 1, which face the lowest ratios of childcare places per child.

Table 1: Childcare access, measured by places per child, across Australian electorates

Electorate	Member (Party)	Margin* (ALP v LIB)	Places per child	Places per child (LDC)
Lyons (TAS)	Brian Mitchell (ALP)	0.9	0.216	0.216
O'Connor (WA)	Rick Wilson (LIB)	6.7	0.241	0.185
Durack (WA)	Melissa Price (LIB)	4.7	0.258	0.208
Chifley (NSW)	Ed Husic (ALP)	13.6	0.277	0.250
Braddon (TAS)	Gavin Pearce (LIB)	8	0.279	0.279
Bullwinkel (WA)	New seat, no MP	3.3	0.283	0.224
Flynn (QLD)	Colin Boyce (NAT)	3.8	0.302	0.235
Cowan (WA)	Anne Aly (ALP)	9.9	0.308	0.257
Canning (WA)	Andrew Hastie (LIB)	1.2	0.322	0.266
Forrest (WA)	Nola Marino (LIB)	4.2	0.331	0.268
Kennedy (QLD)	Bob Katter (KAP)	13.1	0.335	0.278
Franklin (TAS)	Julie Collins (ALP)	13.7	0.336	0.336
Macarthur (NSW)	Mike Freeland (ALP)	9.8	0.336	0.323
New England (NSW)	Barnaby Joyce (NAT)	15.2	0.339	0.257

**Margin is two-party preferred following redistribution as calculated by the ABC.*

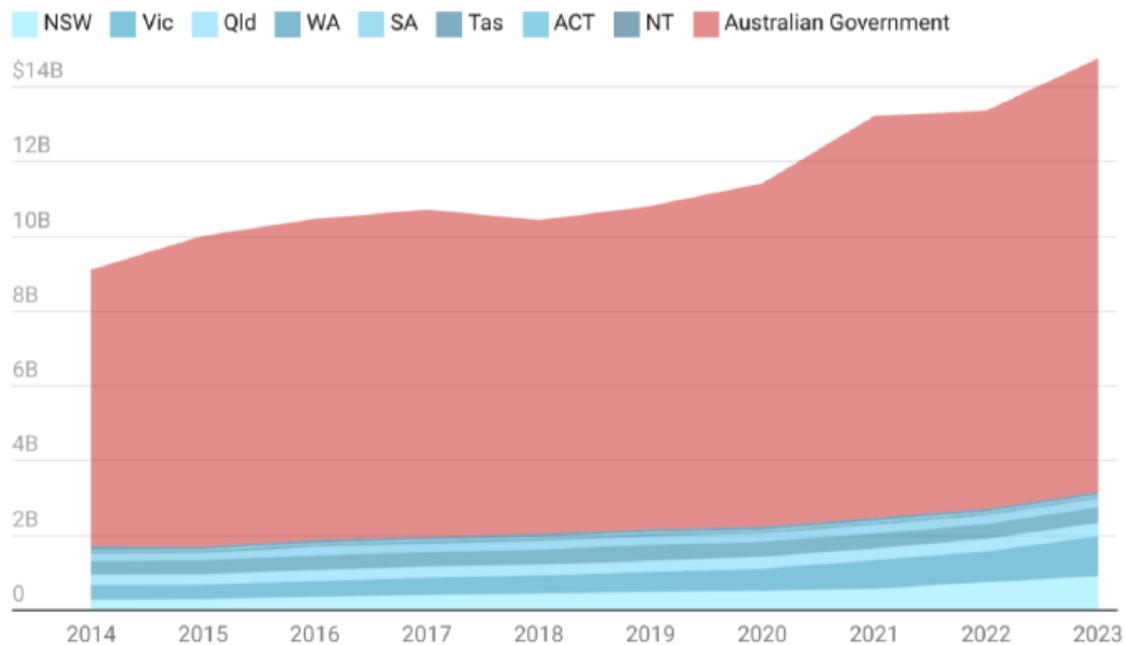
Many electorates with the worst childcare access are in regional or outer metropolitan areas, often facing workforce shortages and limited childcare infrastructure. These include both marginal and safe seats, making ECEC a political and policy issue. Six of the 14 lowest-access electorates are in Western Australia, including the Liberal-held seats of O'Connor, Durack, Canning, and Forrest. Tasmania has three low-access electorates, Labor's Lyons and Franklin, and the Liberal seat of Braddon. In NSW, Labor-held Chifley and Macarthur also feature, though both have relatively safe margins. In Queensland, the National seat of Flynn and the electorate of Kennedy are similarly affected.

What is ECEC?

Early childhood education and care (ECEC) broadly refers to education and care services for children under the age of five, or children yet to start school. This includes centre-based childcare, long day care, family day care, preschool and kindergarten.

While the federal government is the biggest funder of the sector, the states and territories deliver ECEC services and retain some responsibility for quality. The states and territories are the largest government actors in the preschool sector.

Figure 1: ECEC expenditure by level of government, financial years from 2024 to 2023

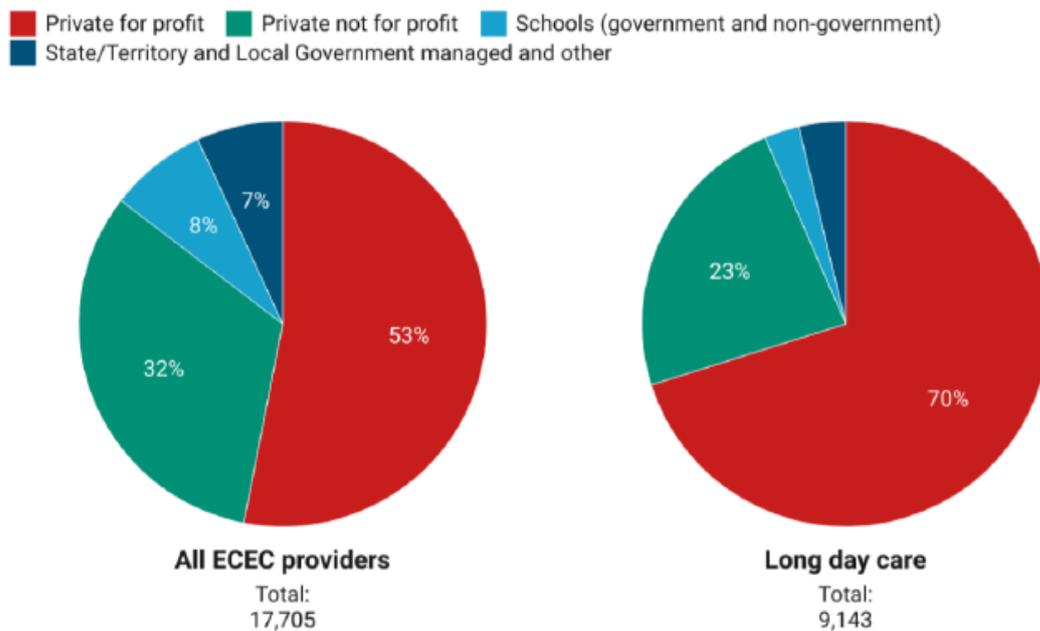


Source: Productivity Commission [6]

Unlike schools, ECEC attendance is not compulsory for children under five. Australia's ECEC system is a mixed market of providers that can be government-funded or privately owned.

They can be operating for- or not-for profit, however, just over half of all ECEC providers in Australia are private providers operating for-profit. When it comes to long day care, 70% are private for-profit providers.

Figure 2: Percentage of ECEC services by provider management type



Source: ACECQA (2024) [7]

Most federal ECEC funding comes through the Child Care Subsidy (CCS), which is paid to providers and passed on as a fee reduction. The subsidy rate depends on family income, with those earning under \$83,820 receiving up to 90%. Families with multiple young children get higher subsidies for the second child.

This funding model also shapes the distribution and accessibility of services covered by the CCS. The subsidy focuses on supporting demand (families' need for childcare) and providers respond to this demand by creating supply (childcare places).

There are some additional programs [8] that support centres to operate in areas of 'thin markets', but it is largely up to providers to choose where to operate. As Mitchell Institute research has found [5], this means there can be great variation in accessibility and the number of childcare places available across different locations. There are often more centres operating in advantaged areas, which is also where providers can charge higher fees.

Although attending high quality ECEC can improve the outcomes of developmentally vulnerable children¹ [9], access to high quality ECEC services is poorer in areas where these children live, compared to the areas where more children tend to be developmentally on track [10, 11]. So, the evidence suggests that the children who could benefit the most from early care and learning are missing out.

¹ The Australian Education Development Census define children as developmentally vulnerable if they are ranked low on two or more domains of development (physical health and wellbeing, social competence, emotional maturity, language and cognitive skills or communication skills and general knowledge) in their first year of school.

What has happened in ECEC policy since the last election?

Since coming to power, the Albanese Government has implemented some significant ECEC policy initiatives. These include \$3.6 billion in wage supplements for early childhood workers, a fund to support the building of 160 new childcare centres, a 'Three Day Guarantee' and the abolishment of the Activity Test, relaxing previous restrictions to government subsidies.

Major steps towards building a 'universal' ECEC system

In 2023, the draft 'National Vision for ECEC' set out equity, affordability, quality and accessibility as the key principles and goals that will underpin the future directions of ECEC in Australia [12].

Recently, the Albanese Government legislated the 'Three Day Guarantee' and the removal of the Activity Test, taking further strides towards making a universal ECEC system a reality for children and families.

The Activity Test was intended to incentivise parents to engage in 'recognised' activities, primarily paid work, but also studying, volunteering or care responsibilities. The parent or guardian with the lowest number of recognised activity hours was used to determine access to subsidised hours for each family.

This approach to eligibility was widely criticised because it created barriers for parents seeking work [13]. The Productivity Commission also recommended that the Activity Test be abolished because it limited access to care for disadvantaged families who could benefit the most from ECEC attendance [14].

More funding and higher subsidies to address affordability

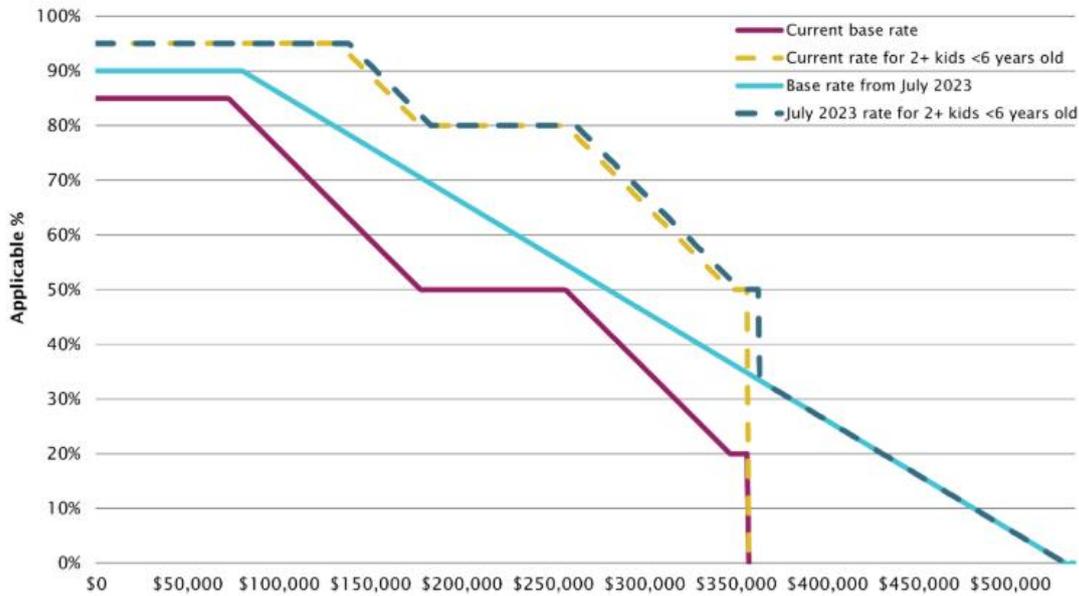
Since the last election, the Federal Government investment into ECEC has increased, mainly through the CCS. Alongside these developments, the number of childcare places has grown, showing improvements in overall access.

In 2023, Labor delivered the Cheaper Childcare reform, which increased the CCS for many families, aiming to reduce out of pocket costs.

Families earning below \$80,000 receive 90% in subsidies for the cost of ECEC, which is up from the previous 80%. The subsidy tapers down from \$80,000 to \$533,280.

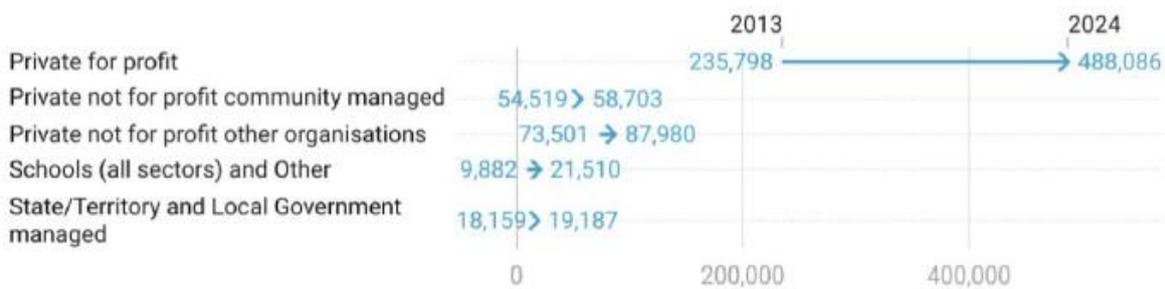
Figure 3 below shows the current CCS rates and previous subsidy rates, per number of children. Figure 4 shows that the number of places has increased significantly, with private for-profit providers largely responsible for the growth.

Figure 3: Changes to the Child Care Subsidy since July 2023



Source: Australian Government [15]

Figure 4: Long day care places by provider manager type for 2013 (Q3) and 2024 (Q2)



Source: ACECQA (2024) [7]

Recommendations from major inquiries have been implemented

Two major ECEC inquiries were conducted in 2024, by the Productivity Commission and the Australian Competition and Consumer Commission (ACCC).

The Productivity Commission inquiry [14] aimed to ‘chart the course for universal, affordable ECEC’. Two central recommendations of the Productivity Commission’s report have become legislated as part of the ‘Three Day Guarantee’ - that every child should be able to access at least 30 hours (or three days a week) of quality ECEC, regardless of their parents’ employment, income or location and that the Activity Test be abolished.

Further recommendations were made on quality, improving inclusion, increasing supply in under-served communities, workforce support and the overall governance of the system. The Productivity Commission also recommended that the CCS rate be increased to 100% for families earning below \$80,000. It also recommended the establishment of an ECEC Commission to support the delivery of a universal system, including reviewing alternative funding and service models.

The ACCC delivered its interim and final reports in 2023, analysing the childcare market, how families make decisions around childcare and use ECEC services and market and workforce dynamics.

Some of the key findings included:

- ◆ The childcare markets and current price regulation mechanisms are not delivering equitable access for all children
- ◆ There are under-served or unserved childcare markets across Australia that include: families in remote areas, households in low socioeconomic areas, children with disability and/or complex needs, First Nations children, culturally and linguistically diverse children and children aged under two years
- ◆ The Activity Test is a barrier to access and disproportionately impacts affordability for low-income households.

The ACCC report called for more funding where it's needed most – in under-served areas – and urged governments to take a stronger lead in steering the childcare market toward fairer, more equitable outcomes. Overall, the ACCC stated that 'market forces on their own may not achieve all desired social objectives or expectations' (p. 16) [10].

The ECEC workforce has received a 15% pay increase

In response to workforce shortages, the Albanese Government introduced a 15% wage increase for ECEC educators through a retention payment. Providers receive the payment, passing it onto eligible educators, but only if they cap fee increases at 4.4% for the next year.

Opposition Leader Peter Dutton described the increase as a 'one-off sugar hit' [16] and questioned the long-term commitment of the Labor Government to supporting the ECEC workforce beyond the federal election.

States and territories further expand the provision of preschool

Preschool provision has increased, driven by federal, state and territory initiatives. The Preschool Reform Agreement (2021–22) guarantees Federal funding of \$1,378 per child for 15 hours of preschool a week in the year before school, aiming to boost equity, participation, and outcomes [17].

States are also expanding access:

- ◆ **Victoria** offers 5–15 hours of kinder for three- and four-year-olds, with *Pre-Prep* (30 hours/week) starting in 2025 [18]
- ◆ **NSW's Start Strong** provides fee relief and 600 hours/year of preschool [19]
- ◆ **Queensland** has rolled out 'Free Kindy' — 15 hours/week for four-year-olds [20]
- ◆ **South Australia**, following a Royal Commission into the early years, will roll out 15 hours/week of preschool for all three-year-olds (2026–2032) alongside integrated early years hubs in vulnerable communities [21]

What are the current issues in early childhood education and care?

Inequitable access is still creating barriers for families

For many families, the biggest barrier to ECEC is access. Mitchell Institute research [5, 22] shows that nearly one in four Australian families live in a 'childcare desert', where more than three children compete for every available place. These access shortages tend to be most acute in regional areas, outer suburbs, and lower-income communities where private providers may be less likely to set up due to lower profit margins. The result is that access to early learning, along with its lifelong developmental, social, and economic benefits is determined by geography rather than need.

The impact of childcare deserts extends beyond families to workforce participation, particularly for women. When access is limited, families, especially mothers, are often forced to reduce work hours or leave the workforce altogether, exacerbating gender inequities in employment and earnings. Despite widespread recognition of this issue, policy responses to date are only providing stop gaps, not systemic change.

The market-first approach assumes private providers will expand naturally to meet demand, but the data shows this is not happening in many communities.

Labor has focused on affordability measures, increasing subsidies and workforce investment, but without a targeted strategy to expand services in high-need areas, childcare deserts will persist.

The Greens have proposed a publicly funded ECEC expansion, arguing that access should be guaranteed rather than left to market forces [23].

Despite the proposed addition of new 160 centres under Labor, the lack of clear policy interventions to improve equitable childcare supply means that barriers between families and the potential benefits of ECEC will be sustained.

It also raises a critical question for this election: will any party take on the structural reforms needed to ensure that every child – regardless of postcode – has access to early learning?

Quality is a key issue

In a largely privatised market, families are expected to drive quality through consumer choice. The assumption is that competition will reward high-performing providers and push out weaker ones. However, when places are scarce, families cannot easily switch providers, limiting the effectiveness of market-driven improvements.

Quality in ECEC is overseen by the Australian Children's Education and Care Quality Authority (ACECQA), with centres rated as *Excellent*, *Exceeding*, *Meeting*, or *Working Towards* the National Quality Standards (NQS). While most meet or exceed the standards, media reports have raised concerns about centres rated below standard, including cases of neglect, underpayment, and poor care.

In response, the Greens have called for a Royal Commission [24] while Minister Anne Aly has announced tougher rules for low-rated centres, including blocking new approvals and increasing compliance checks [25]. The Government is also exploring restricting access to funding to providers not meeting the national standards.

Organisations such as the Australian Childcare Alliance support the strengthening of regulations and prioritising child safety [26].

The early years system needs to be more integrated

We know that the first three years are crucial to the learning outcomes of children [27].

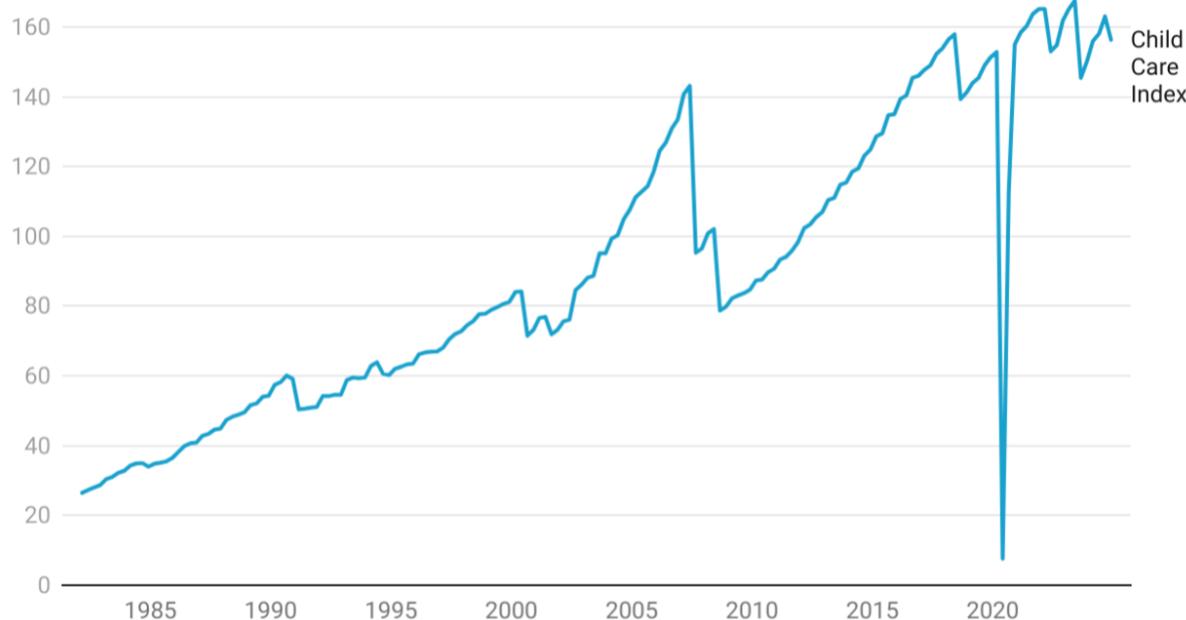
ECEC is part of a broader system of child development in the early years that includes maternal and child health care and development. The question that remains largely unanswered is how to bring these parts together to address the needs of children, especially those experiencing disadvantage.

Social Ventures Australia recommend that 'Early Childhood Hubs' are needed in communities experiencing high levels of disadvantage and additional needs [28]. These hubs would deliver wraparound services for families, including early childhood education and care, allied health, and family and parenting supports. It is proposed that funding from the Building Early Education Fund could be directed towards hubs, starting with the 131 communities identified in the analysis as high need.

Lowering out-of-pocket costs for childcare

Labor have described their policies as building a 'universal' system, similar to Medicare or the National Disability Insurance Scheme (NDIS). This is especially important, because although the out-of-pocket amount paid by families for childcare depends on a range of factors, Figure 5 shows that the cost of childcare has risen steadily over time.

Figure 5: Quarterly Consumer Price Index (CPI) of childcare prices, 1983 to 2024



Source: ABS [29]

Rather than continuing with a subsidised model, some argue Australia should shift to a flat-fee approach like Quebec's \$10-a-day childcare [30].

No policy changes have been made yet, but momentum is building around a flat-fee childcare model, with Labor proposing a \$10–\$20 per day rate if re-elected [31]. The Coalition has not responded directly to this proposal, though it has promised lower out-of-pocket costs and better access in underserved areas. The Productivity Commission estimates a \$10 flat fee would cost an additional \$8.3 billion annually [14]. The Coalition continues to support the Activity Test, arguing it balances targeted support, a safety net for vulnerable families, and quality learning [32].

The ECEC workforce needs more support

Early childhood educators are central to delivering quality ECEC. Under the National Quality Framework, all must hold at least a Certificate III, with half requiring diploma-level qualifications and most centres needing two degree-qualified teachers.

A 2024 Jobs and Skills Australia report found current workforce levels unsustainable. Meeting future demand – especially under the 'Three Day Guarantee' – will require workforce growth of 3% annually, and 5.4% for Early Childhood Teachers [33].

Research that engages early childhood educators at different stages of their careers highlights that most early career educators with minimum qualifications are motivated to obtain diploma or higher level qualifications, but more study supports are needed [34].

To explore and address ECEC workforce challenges, the Government has created the

National Children's Education and Care Workforce Strategy, 'Shaping our Future', which proposes strategies related to recognition, attraction, retention, qualifications and pathways, capability, wellbeing and data and evidence [25].

What are the parties offering?

We have seen that in a system driven by market forces and competition, the pursuit of profit can push quality down instead of driving it up, leaving young children vulnerable in the process. Will this lead to greater support for non-profits, or will the market continue to dominate the sector's direction?

As Australians prepare to vote on May 3, ECEC policy will come down to distinct party approaches to funding, access, and equity.

Labor has put forward a plan to overhaul childcare subsidies and increase funding for ECEC to reduce the financial burden on families, especially low- and middle-income households. They have also made a significant commitment to raising wages for early childhood educators to address workforce shortages and improve care quality.

In contrast, the Coalition argues that universal schemes are unsustainable, preferring a market-driven approach to support affordability by incentivising competition among private providers. They focus on targeted subsidies, which they argue would ensure that the financial burden on taxpayers remains manageable. Their reluctance to embrace universal access echoes their broader economic philosophy that favours free-market principles over state intervention.

The Greens advocate for a far more progressive, fully publicly funded ECEC system, eliminating fees and providing universal access to all families. They also call for greater investment in the workforce, ensuring fair pay and conditions for educators. The Greens' proposals would dramatically shift the current system, which they argue is fundamentally inequitable under its current market-based structure.

The debate over workforce reform remains a major point of contention, with Labor and the Greens focusing on raising wages and improving working conditions for educators, while the Coalition suggests more indirect, market-based solutions, including tax incentives for providers.

The major differences highlighted here reflect a broader philosophical divide between those who see ECEC as a fee for service market and those who view it as a fundamental social and educational right.

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