



**MINISTRY OF EDUCATION**

*Te Tāhuhu o te Mātauranga*

# **National School Roll Projections**

**2009 Update**

**Report:**

*National School Roll Projections: 2009 Update*

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## EXECUTIVE SUMMARY

These national school roll projections (NSRP) were completed in September 2009 and include the latest numbers for student enrolments in New Zealand schools as of 1 July, 2009. Total school rolls in 2009 were 0.3% higher than expected, a difference of 1,900 students. This variation was mainly due to the unexpectedly high number of students in secondary schooling as a result of the current economic recession, which has increased youth unemployment and led to higher retention at the upper secondary level.

The medium projection, considered to be the most plausible scenario, predicts total school rolls will increase from 751,100 in 2009 to 759,000 in 2012. This increase is attributed to the impact of current economic conditions on participation and retention in secondary schooling, as well as relatively large birth cohorts entering primary schooling. Larger increases are expected after 2013, with a peak of an estimated 821,000 full-time equivalent students in 2024. This specific trend is primarily a product of the recent high births and relatively high expected birth rates.

Primary school rolls<sup>1</sup> are expected to increase steadily before peaking in 2019 at 527,000 students. Secondary school rolls were 1.4% higher than previous projections for 2009 (a difference of 3,700), and the retention and progression rates are expected to remain at the current rate until 2012. Recent high birth cohorts will pass through secondary schooling five years later, leading to a large increase in secondary school rolls. This growth is expected to peak in 2025 at an estimated 309,000 full-time equivalent students.

This report presents a range of high, medium and low projections of school rolls. The Ministry will continue to closely monitor the number of school enrolments and the main drivers of roll transformations.

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<sup>1</sup> Projected rolls do not include foreign fee-paying students or students attending special schools.

# 1. Introduction

The National School Roll Projections (NSRP) are produced and updated by the Ministry of Education twice a year, usually in February prior to Government Budget and Fiscal Update and in September after March and July roll return collections from schools have been completed. The Ministry has produced three variants – low, medium and high projections – to provide risk assessments around projected rolls. The projections are used to assess demand for resources and are a part of the Government’s five-year budget process. In addition, the projections support expenditure forecasts of teachers’ salaries, schools’ operational grants, student allowances and any other policy costing or planning during the schooling sector.

This report describes the latest projections of the number of full-time equivalent students<sup>2</sup> enrolled in New Zealand schools. These projections are based on a roll snapshot as of 1 July for primary year-levels (years one to eight) and 1 March for secondary year-levels (years nine to fifteen). The use of the July snapshot is an attempt to capture as many new entrants to the primary schooling system as possible. Similarly, the March snapshot captures as many secondary students as possible before they exit the schooling system. The July and March rolls also are the basis for funding primary and secondary schools respectively.

The projections are based on assumptions regarding progression/retention rates, fertility and migration levels in future years. To provide risk assessments of the projected rolls, the forecast results are based on three projection series of low, medium and high predictions. The fertility assumption is a primary driver for national school roll projections. Given the rapid rise in the birth rate in recent years, Statistics New Zealand (SNZ) revised the birth projections from the original 2006-base to the new 2008-base births. SNZ considers the revised Series 5 to be the most likely medium long-term scenario; it assumes medium fertility, medium mortality and medium migration and employs the new base population as of 30 June 2008. Therefore, the revised series has been used for the medium forecast.<sup>3</sup>

The Ministry has traditionally used the medium projection for financial forecasting and planning purposes; however, consideration should be given to the possibility of high and low projections eventuating. The projections also take into account the changes of the economic conditions and government policies.

This report is divided into three main sections:

1. Introduction of school roll projections (presented in this section);
2. The results of the latest school roll projections under different scenarios;
3. The projections for special school students and home schooling students.

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<sup>2</sup> Note that special school and home-schooled students are modelled separately and are not included in the roll projections discussed in Sections 1 and 2 of this report.

<sup>3</sup> The next NSRP update will include the most recent 2009-base population projections.

## 2. School Roll Projections

The medium projection is based on the Ministry's best estimates of progression/retention rates, economic conditions and fertility and migration levels in future years. One of the main changes in this forecast is the revision of progression/retention rates. According to the latest year-to-date school rolls information, retention in upper secondary schooling is currently higher than historically observed. It is assumed that retention rates are related to an increase in unemployment among youth as a result of current economic conditions.

Birth projections have been revised by Statistics New Zealand (SNZ), given the rapid rise of births in recent years. SNZ revised the birth projections of 2006-base with 2008-base information, and this forecast has been revised accordingly. The net migration assumption has been also revised as well. 2007 and 2008 were high departure years for New Zealand; however, the latest migration statistics show that the departure is not as high under the current global economic recession as it has been recently. SNZ predicts that the net migration level in 2010 would be relatively higher than in the last few years but is expected to drop off slightly and be stable for the long-term.

The projected rolls presented below are for conventional students from Year 1 to Year 15 in the New Zealand schooling system. This excludes foreign fee paying students (FFPs) and students receiving scholarships from the New Zealand Agency for International Development (NZ Aid) but includes adult students. Special schools and home schooled students are projected separately and will be discussed in Section 3 of this report. Note that secondary rolls are as of March and primary rolls as of July.

Table 1 below presents the rolls for actual, medium projected primary and secondary schooling and total schools for this forecast, which is compared with the previous forecast from February 2009.

Table 1. Total School Rolls

Projection Year	Medium 2009 Projection	Medium 2008 Projection	Difference Between Projections
2009*	751,100	749,220	1,880
2010	753,540	748,160	5,380
2011	754,910	748,660	6,250
2012	759,370	752,890	6,480
2013	766,370	759,480	6,890
2014	773,760	766,660	7,100
2015	781,610	774,480	7,130
2016	788,350	781,370	6,980
2017	794,830	785,030	9,800
2018	800,280	788,060	12,220
2019	805,890	791,700	14,190
2020	811,310	795,320	15,990
2021	815,700	798,430	17,270
2022	819,180	799,770	19,410
2023	820,910	799,930	20,980
2024	821,250	799,370	21,880
2025	818,440	795,950	22,490
2026	813,800	790,880	22,920
2027	809,170	785,820	23,350
2028	804,730	-	-

Notes: \* Actual rolls in 2009.

Source: NSRP, September 2009, Ministry of Education

Total school rolls are expected to increase to 759,000 over the next three years, which is 6,500 (0.9%) higher than predicted in the previous projection. This short-term increase is mainly due to the expected impacts of current economic conditions on participation and retention in secondary schooling, as well as the impact of relatively large birth cohorts entering primary schooling. A larger increase appears after 2013 and peaks in 2024 at an estimated 821,000 total full-time equivalent students. This trend is mainly due to the recent high births progressing through the schooling system. Table 2 shows that the changes of total school roll projections between 2008 forecast and 2009 forecast within three main forecast drivers: births projection, retention rates and migration.

**Table 2. Attribution Analysis of Total School Rolls Projection between 2009 Projection and 2008 Projection**

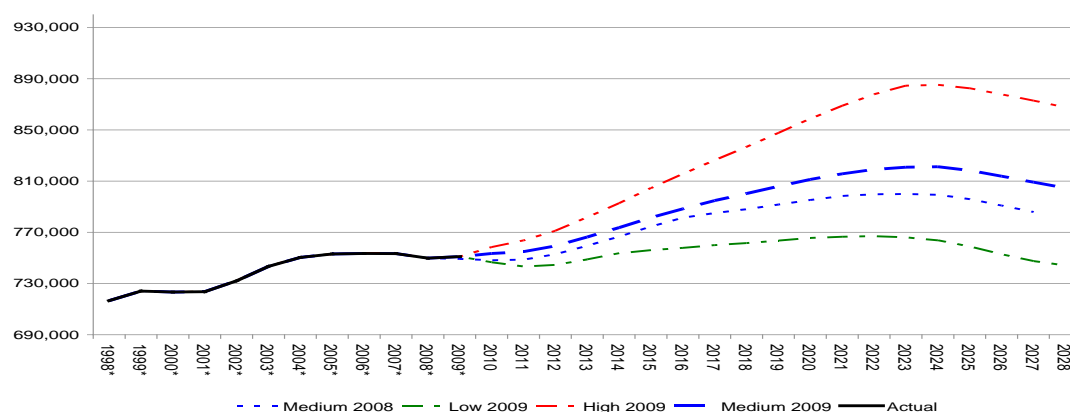
Projection Year	Due to births <sup>#</sup>	Due to retention rate	Due to migration	Difference Between Projections
2009	0	3,280	-1,390	1,880
2010	0	4,590	790	5,380
2011	0	5,450	800	6,250
2012	0	5,840	640	6,480
2013	0	6,410	480	6,890
2014	-330	7,230	210	7,100
2015	-790	7,780	140	7,130
2016	-1,950	8,890	40	6,980
2017	180	9,630	-10	9,800
2018	2,120	10,230	-130	12,220
2019	3,780	10,620	-210	14,190
2020	5,190	11,120	-320	15,990
2021	6,410	11,220	-360	17,270
2022	7,320	12,480	-390	19,410
2023	8,640	12,680	-330	20,980
2024	9,230	12,960	-310	21,880
2025	9,610	13,080	-200	22,490
2026	9,950	13,060	-90	22,920
2027	10,340	12,960	50	23,350

Notes: <sup>#</sup> The projections from 2009 to 2013 are based on actual births from 2004 to 2008. Therefore, there is no change for birth projections between 2009 projection and 2008 projection from 2009 to 2013.

Compared with the previous forecast, the revised retention rates and migrations in 2009 are the main drivers of the forecast changes between 2010 and 2014. From 2015 onwards, the new births in the population projection are also the main driver of the forecast changes. In the following sections, a similar table will be presented for primary and secondary schooling.

Figure 1 graphically presents the projected total school rolls under the three sets of scenarios (low, medium and high) and compares these with the previous medium projection (2008).

Figure 1. Total School Roll Projection Scenarios



It shows that the projection of total school rolls is consistently higher than the previous projection. The variance between the different scenarios escalates from 2012 onward as the recent large birth cohorts begin entering the schooling system.

## 2.1 Primary School Roll Projections

The latest information from schools shows that in 2009, primary enrolments were around 473,000 - approximately 1,180 or 0.2% fewer than in 2008. The rolls are expected to increase from 2010 onwards and peak at 527,280 in 2019. Table 1 presents the primary school roll projections under medium scenario by each year of schooling from 2009 to 2028 (see Table 2). Note that the high year 7 rolls observed in Table 3 are due to measurement issues<sup>4</sup> and not due to an unusually large cohort.

Table 3. Breakdown of the Primary School Roll Projections (Medium Variant)

Projection Year	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Total
2009*	57,848	57,003	56,466	57,979	59,225	57,029	68,478	58,937	472,965
2010	59,370	57,400	57,180	56,840	58,360	59,040	67,110	59,910	475,220
2011	59,660	58,860	57,520	57,500	57,160	58,120	69,410	58,670	476,920
2012	63,330	59,150	58,980	57,850	57,830	56,940	68,330	60,680	483,080
2013	65,750	62,770	59,270	59,310	58,170	57,590	66,940	59,740	489,540
2014	65,590	65,170	62,890	59,590	59,630	57,940	67,710	58,530	497,050
2015	65,370	65,010	65,280	63,220	59,920	59,390	68,110	59,200	505,510
2016	64,670	64,790	65,120	65,620	63,560	59,670	69,820	59,550	512,810
2017	64,020	64,100	64,900	65,460	65,960	63,290	70,150	61,030	518,910
2018	63,450	63,450	64,210	65,240	65,800	65,670	74,380	61,330	523,540
2019	62,980	62,890	63,560	64,550	65,580	65,510	77,180	65,010	527,270

<sup>4</sup> Upon entry from primary to intermediate schooling, some schools reset the funding year level. Funding year level is defined by the years spent in schooling, which may be different from the academic year level. For example, for students who have repeated a year or spent more than the allocated six years in primary schooling, upon their entry into intermediate school, the funding year is reset back to seven, even though they spent more than seven years in the schooling system.



<b>2020</b>	62,570	62,420	63,010	63,900	64,890	65,290	76,990	67,450	526,530
<b>2021</b>	62,230	62,020	62,540	63,340	64,240	64,610	76,740	67,290	523,000
<b>2022</b>	61,950	61,680	62,140	62,870	63,680	63,960	75,930	67,060	519,270
<b>2023</b>	61,690	61,400	61,800	62,470	63,210	63,400	75,180	66,360	515,520
<b>2024</b>	61,470	61,160	61,520	62,130	62,810	62,940	74,520	65,700	512,240
<b>2025</b>	61,250	60,940	61,270	61,850	62,470	62,540	73,980	65,130	509,420
<b>2026</b>	61,040	60,720	61,050	61,600	62,190	62,200	73,510	64,660	506,950
<b>2027</b>	60,840	60,510	60,830	61,380	61,930	61,920	73,110	64,250	504,780
<b>2028</b>	60,670	60,320	60,620	61,160	61,710	61,670	72,790	63,900	502,850

Notes: \* Actual July rolls in 2009.

Source: NSRP, September 2009, Ministry of Education

The most significant driver in the primary forecast is the number of children born in a given year, and their entrance into the school system upon their fifth birthday. Since 2004, there has been a gradual increase in the annual number of births. Births even climbed after 2007, and until now there have been three consecutive years of high birth cohorts that will begin entering primary schooling from 2012. This increase is expected to boost primary rolls from 2012 onwards and eventually impact secondary rolls in later years. In addition, if births remain at current levels for the next few years, it will lead to further increases in primary enrolments from 2015 onwards. The retention rates are also an important driver in the primary school rolls forecast. The retention rates in 2009 projection have incorporated the previous years and 2009 rolls information. The impact of net migration on primary schooling is expected to increase slightly in 2010, and then decline steadily for the next few years. However the effect of migration is relatively small.

Table 4 shows that in 2009 the actual primary school rolls were lower than the 2008 forecast. This is mainly due to the lower than expected migration of aged 5 children in 2008 forecast.

**Table 4. Attribution Analysis of Primary School Roll Projection between 2009 Projection and 2008 Projection**

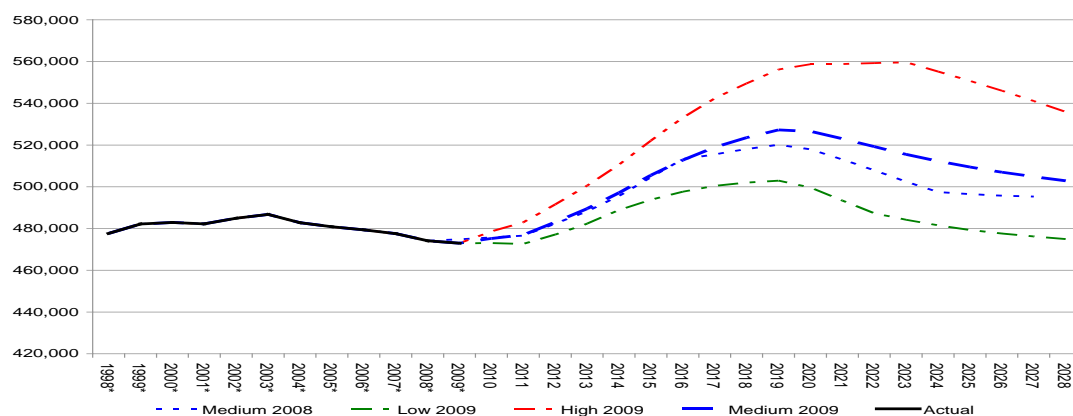
Projection Year	Due to births <sup>#</sup>	Due to retention rate	Due to migration	Difference Between Projections
2009*	0	-870	-990	-1,860
2010	0	-880	360	-520
2011	0	-20	310	290
2012	0	600	140	740
2013	0	1,330	-50	1,280
2014	-330	2,130	-340	1,460
2015	-790	2,220	-430	1,000
2016	-1,950	1,980	-550	-520
2017	180	3,830	-590	3,420
2018	2,120	3,880	-540	5,460
2019	3,780	3,900	-560	7,120
2020	5,190	3,890	-480	8,600
2021	6,410	3,850	-350	9,910
2022	7,650	3,800	-140	11,310
2023	9,440	3,750	-140	13,050
2024	11,190	3,700	-140	14,750
2025	9,400	3,690	-140	12,950
2026	7,680	3,690	-140	11,230
2027	5,920	3,680	-140	9,460
2028	-	-	-	-

Notes: <sup>#</sup> The projections from 2009 to 2013 are based on actual births from 2004 to 2008. Therefore; there is no change for births' projections between 2009 projection and 2008 projection from 2009 to 2013.

Compared with the previous forecast, the revised retention rates and migrations in 2009 are the main drivers of the forecast changes between 2010 and 2014. From 2015 onwards, the new predicted births in the population projection is also the main driver of the forecast changes.

Figure 2 below graphically presents the projected primary rolls under the three sets of scenarios (low, medium and high) and compares these with the previous medium projection from 2008.

**Figure 2. Primary School Roll Projection Scenarios**



Source: NSRP, September 2009, Ministry of Education

It can be observed that the revisions in the primary rolls from the previous forecast are relatively small prior to 2017. The variance in rolls between the low and high scenario is greater after 2014.

## 2.2 Secondary School Roll Projections

Based on the 1 March, 2009 snapshot of students, secondary enrolments were around 278,000 – approximately 2,400 or 0.9% more than in 2008, and 3,700 (1.4%) more than expected in the previous projection. As mentioned earlier, this is assumed to be a result of the current economic recession, which led to increase in youth unemployment and consequently higher retention in upper secondary schooling. The latest unemployment forecast from the Treasury estimates that unemployment rates will rise in the coming years, reaching 7.2 per cent in 2009 and 7.7 per cent in 2011, compared to unemployment rate of 4.3 per cent in 2008. However, unemployment is anticipated to decrease from 2012 onwards as the economy recovers from recession. This roll projection forecast takes into account the unemployment forecast and maintains retention rates in secondary schooling at a steady at 2009 level until 2011 even though this retention rate is significantly higher than has been historically observed. Table 5 shows the assumptions of Year 12 – Year 15 retention rates for projected years.

**Table 5. Assumptions of Year 12 - Year 15 Retention Rates<sup>5</sup>**

Projected years	Year 11-12	Year 12-13	Year 13-14	Year 14-15
2010-2011	88.6%	79.6%	2.7%	31.1%
2012 onwards	88.5%	79.5%	2.3%	27.0%

Table 6 contains projected secondary rolls the under medium scenario by each year of secondary schooling from 2009 to 2028. Secondary rolls are expected to decline between 2012 and 2016, despite the fact that assumptions of progression rates are set higher than in the previous forecast. This is due to the three consecutive years of smaller cohorts entering secondary schooling beginning in 2010. It is apparent from Table 6 that the secondary rolls will significantly increase from 2020 onwards. This reflects the recent large birth cohorts who will be entering secondary schooling from 2020. Secondary rolls are projected to peak in 2025 with around 309,020 full-time equivalent secondary students (see Table 6). The impact of migrants on secondary enrolments is expected to remain steady at the 2009 level in 2010, and then decline steadily for the next few years. As it was noted previously, the impact of net migration on enrolments is also relatively small in scale.

**Table 6. Breakdown of the Secondary School Roll Projections (Medium scenario)**

Projection Year	Year 9	Year 10	Year 11	Year 12	Year 13	Year 14	Year 15	Total
2009*	59,937	60,364	60,921	53,788	41,771	1,076	278	278,135
2010	58,880	60,200	61,000	53,990	42,810	1,110	330	278,320
2011	59,810	59,100	60,770	54,010	42,910	1,060	320	277,990
2012	58,580	60,040	59,670	53,790	42,940	990	290	276,290
2013	60,570	58,800	60,600	52,830	42,750	990	270	276,820
2014	59,640	60,800	59,370	53,650	42,000	990	270	276,710
2015	58,430	59,860	61,370	52,560	42,640	970	270	276,100
2016	59,100	58,660	60,430	54,330	41,780	980	260	275,540
2017	59,450	59,330	59,230	53,500	43,180	960	260	275,920

<sup>5</sup> The retention rate is the probability that a student at a year level will continue onto the next year level.

2018	60,920	59,680	59,900	52,460	42,530	1,000	260	276,740
2019	61,220	61,150	60,250	53,030	41,720	980	270	278,620
2020	64,880	61,440	61,720	53,350	42,160	970	260	284,780
2021	67,300	65,100	62,010	54,640	42,410	970	260	292,700
2022	67,140	67,520	65,680	54,890	43,430	980	260	299,900
2023	66,920	67,360	68,100	58,120	43,620	1,000	260	305,400
2024	66,220	67,140	67,940	60,240	46,180	1,010	270	309,010
2025	65,570	66,440	67,720	60,100	47,850	1,070	270	309,020
2026	65,000	65,780	67,020	59,910	47,740	1,110	290	306,850
2027	64,530	65,220	66,370	59,300	47,580	1,100	300	304,390
2028	64,120	64,750	65,800	58,720	47,100	1,100	300	301,880

Notes: \* Actual March rolls in 2009.

Source: NSRP, September 2009, Ministry of Education

Table 7 shows that the revised retention rates and migrations in 2009 are the main drivers of the forecast changes in secondary school rolls between 2010 and 2021 compared with the previous forecast. From 2022 onwards, the new births in the population projection are also the main driver of the forecast changes for secondary schooling.

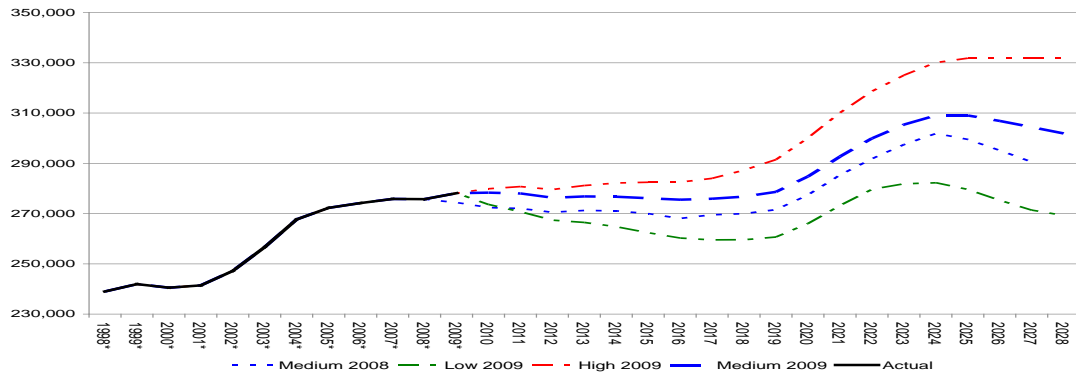
**Table 7. Attribution Analysis of Secondary School Roll Projection between 2009 Projection and 2008 Projection**

Projection Year	Due to births <sup>#</sup>	Due to retention rate	Due to migrations	Difference Between Projections
2009*	0	4,150	-400	3,750
2010	0	5,470	440	5,910
2011	0	5,460	500	5,960
2012	0	5,240	500	5,740
2013	0	5,080	520	5,600
2014	0	5,100	550	5,650
2015	0	5,560	570	6,130
2016	0	6,900	590	7,490
2017	0	5,800	580	6,380
2018	0	6,350	420	6,770
2019	0	6,710	350	7,060
2020	0	7,230	160	7,390
2021	0	7,370	0	7,370
2022	-330	8,680	-250	8,100
2023	-800	8,930	-190	7,940
2024	-1,960	9,260	-170	7,130
2025	200	9,390	-60	9,530
2026	2,270	9,380	50	11,700
2027	4,420	9,280	190	13,890
2028	-	-	-	-

Notes: <sup>#</sup> The projections from 2009 to 2013 are based on actual births from 2004 to 2008. Therefore, there is no change for birth projections between 2009 projection and 2008 projection from 2009 to 2013.

Figure 3 shows projected secondary rolls under the three sets of scenarios (low, medium and high) and compares these to the previous medium projection (2008).

Figure 3. Secondary School Roll Projection Scenarios



Source: NSRP, September 2009, Ministry of Education

Revisions in the secondary rolls under the medium scenario have been quite substantial compared to the revisions made in primary rolls (see Figure 1). The variance of the high and low scenarios from the medium scenario is relatively stable.

### 3. Special Schools and Home Schooled Students

Special school enrolments and home schooled students are modelled separately from the National School Roll Projections and are not included in the discussions above. Projected special schools and home school enrolments are presented in Table 8. Projected special school enrolments are expected to increase from 3,600 in July 2009 to 3,900 in July 2028 due to the recent high births. Similarly, the number of home schooled students is also expected to grow from 6,600 in July 2009 to 7,000 in July 2028.

Table 8. Projections for Special Schools and Home Schooling Students

Projection Year	Special School Students			Home Schooling Students		
	Primary	Secondary	Total	Primary	Secondary	Total
2005*	1,739	1,635	<b>3,374</b>	4,371	2,057	<b>6,428</b>
2006*	1,668	1,684	<b>3,352</b>	4,247	2,051	<b>6,298</b>
2007*	1,669	1,798	<b>3,467</b>	4,291	2,182	<b>6,473</b>
2008*	1,677	1,843	<b>3,520</b>	4,303	2,197	<b>6,500</b>
2009*	1,665	1,927	<b>3,592</b>	4,359	2,231	<b>6,590</b>
2010	1,670	1,930	<b>3,600</b>	4,310	2,210	<b>6,520</b>
2011	1,670	1,940	<b>3,610</b>	4,320	2,210	<b>6,530</b>
2012	1,680	1,950	<b>3,630</b>	4,350	2,230	<b>6,580</b>
2013	1,700	1,970	<b>3,660</b>	4,390	2,250	<b>6,640</b>
2014	1,720	1,980	<b>3,700</b>	4,440	2,270	<b>6,710</b>
2015	1,730	2,010	<b>3,740</b>	4,480	2,290	<b>6,780</b>
2016	1,750	2,020	<b>3,770</b>	4,520	2,310	<b>6,840</b>
2017	1,760	2,040	<b>3,800</b>	4,560	2,330	<b>6,890</b>
2018	1,770	2,050	<b>3,830</b>	4,590	2,350	<b>6,940</b>
2019	1,790	2,070	<b>3,850</b>	4,620	2,370	<b>6,990</b>
2020	1,800	2,080	<b>3,880</b>	4,650	2,380	<b>7,040</b>
2021	1,810	2,090	<b>3,900</b>	4,680	2,390	<b>7,070</b>
2022	1,820	2,100	<b>3,920</b>	4,690	2,400	<b>7,100</b>
2023	1,820	2,110	<b>3,930</b>	4,700	2,410	<b>7,110</b>
2024	1,820	2,110	<b>3,930</b>	4,700	2,410	<b>7,100</b>
2025	1,810	2,100	<b>3,920</b>	4,680	2,400	<b>7,080</b>
2026	1,800	2,090	<b>3,890</b>	4,660	2,380	<b>7,040</b>
2027	1,790	2,080	<b>3,870</b>	4,630	2,370	<b>7,000</b>
2028	1,780	2,070	<b>3,850</b>	4,610	2,360	<b>6,960</b>

\* Actual July rolls in 2009.

Source: NSRP, September 2009, Ministry of Education

## **4. Conclusion**

Slight growth in total school rolls is expected in the short-term. This will be chiefly driven by increasing retention in upper secondary schooling, a result of the current economic recession. However, the number of recent births remains the most significant driver of school rolls in short and long-term. Entry of consecutive cohorts into the schooling system will essentially determine the trend in school rolls in the coming years. Currently, these large cohorts are participating in the early childhood education sector and the first large birth cohort will enter schooling in 2012. The Ministry will continue to closely monitor the number of school enrolments and the determinants of these enrolments (births, economic condition, migration and retention).