

Ghana's Education Sector Report

November 2022

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A photograph of a classroom with several students. In the foreground, a young woman with dark hair in braids is focused on writing in a notebook with a blue pen. She is wearing a green and white checkered school uniform. Behind her, other students are visible, also in similar uniforms, some looking towards the camera and others looking down at their work. The background is slightly blurred, emphasizing the student in the foreground.

01

Why Invest in Ghana

Why invest in Ghana

Country overview

- Formerly known as the Gold Coast, Ghana was the first sub-Saharan nation to gain independence from colonial rule in 1957.
- Ghana is credited as being one of the most stable democracies in Africa, having successfully conducted 8 national elections and recorded no incidence of a coup d'état since 1992.

Airports



- 1 international airport
- 5 domestic airports

Railway



- 3 major railway networks with a total track length of 1,300 km

Dry ports



- Tema Port
- Takoradi Port

Road network



- Main roads: 67,291 Km
- Main arteries : 12,800 Km
- Paved roads: 3,800 Km

Internal infrastructure

Total land area

Overview: Ghana has total land area of 238,537 sq.km

Ghana has 16 administrative regions and 261 district assemblies.

Electricity supply

- Ghana's electricity supply is derived from hydropower generated from the Akosombo, Bui Power and Kpong dams, and 10 thermal plants at Aboadze in Western Region.
- According to World Bank, Ghana has an 86.63% (2021) access to electricity rate.

Water supply

Water is provided to citizens through the Ghana Water Company Limited, Community Water and Sanitation Agency and private water producers.

Locational advantage

- Ghana is geographically closer than any other country to the center of the earth.
- Ghana has 2 harbors with one being the largest in West Africa, making Ghana the gateway to West Africa.



Why invest in Ghana

Investment attractions

| | | | |
|--|---|--|--|
| <p>2nd largest economy in West Africa</p> <ul style="list-style-type: none"> ○ Ghana has an active retail market and healthy consumption levels. Fitch reports, household spending is expected to increase from US\$55bn in 2021 to USD81bn in 2025. ○ AfCFTA presents an opportunity for intra-regional growth by leveraging access to common markets and knowledge transfer through labour mobility, thereby attracting foreign direct investments into the region. ○ The AfCFTA secretariat is located in Ghana. | <p>Rich in natural resources</p> <ul style="list-style-type: none"> ○ Ghana was the largest (No.1) producer of gold in Africa and 6th largest in the world in 2021. ○ 13,000 metric tonnes of manganese reserve. ○ 16.86 million tonnes of high-grade trihydrate bauxite mined since 1997. ○ Newly discovered deposits of lithium in 2021 amounting to 30.1million tonnes, setting Ghana up to become West Africa's first lithium producer. | <p>Preferred tourism destination</p> <ul style="list-style-type: none"> ○ International arrivals of tourist increased from 932,579 in 2016 to 1,130,307 in 2019, however 2020 saw a reduction to 355,108 due to lockdown measures in response to Covid -19. ○ As at September 2021, international tourist arrivals increased by 18% while domestic tourists grew by 58%. | <p>Youthful population</p> <ul style="list-style-type: none"> ○ Ghana is blessed with a very youthful population, about 67% of the population is within the ages of 15 to 64 years. ○ Government initiative such as free basic and secondary has ensured a 69.8% literacy rate for citizens who are 6 years and older as at 2021. |
| <p>Stable political environment</p> <ul style="list-style-type: none"> ○ Ghana is ranked the second most peaceful country in Africa and the 38th most peaceful country in the world as per the 2021 Global Peace Index. ○ Due to provisions made in the constitution of Ghana (article 20) and Free Zones Act (Act 504) there is a reduced threat of nationalism of private businesses. | <p>Investor-friendly government initiatives</p> <ul style="list-style-type: none"> ○ Government has initiated a plethora of incentives to ensure a conducive and enabling business environment. ○ Government incentives include tax holidays, rebates, provision of industrial parks, provision of finance through partnering agencies and interest subsidies. ○ Ghana has double taxation agreements with the United Kingdom, South Africa and other EU countries. | <p>Top investment destination</p> <ul style="list-style-type: none"> ○ Foreign Direct Investment (FDI) has averaged \$2.72b from 2017 to 2021, suggesting stability in the inflow of capital with investment focus in oil and gas, mining (including gold and manganese), and agriculture (cocoa). ○ Ghana attracted US\$2.65bn in FDI inflows in 2020, one of the highest amount in West Africa. | <p>Agrarian economy</p> <ul style="list-style-type: none"> ○ Ghana is endowed with vast arable lands rich in agriculture. ○ In 2020, Ghana was the 2nd largest producer of cocoa in the world, the 4th largest producer of cassava in the world. ○ Ghana is blessed with fertile land for the production of maize, tomato, rice among many other food crops. |

02

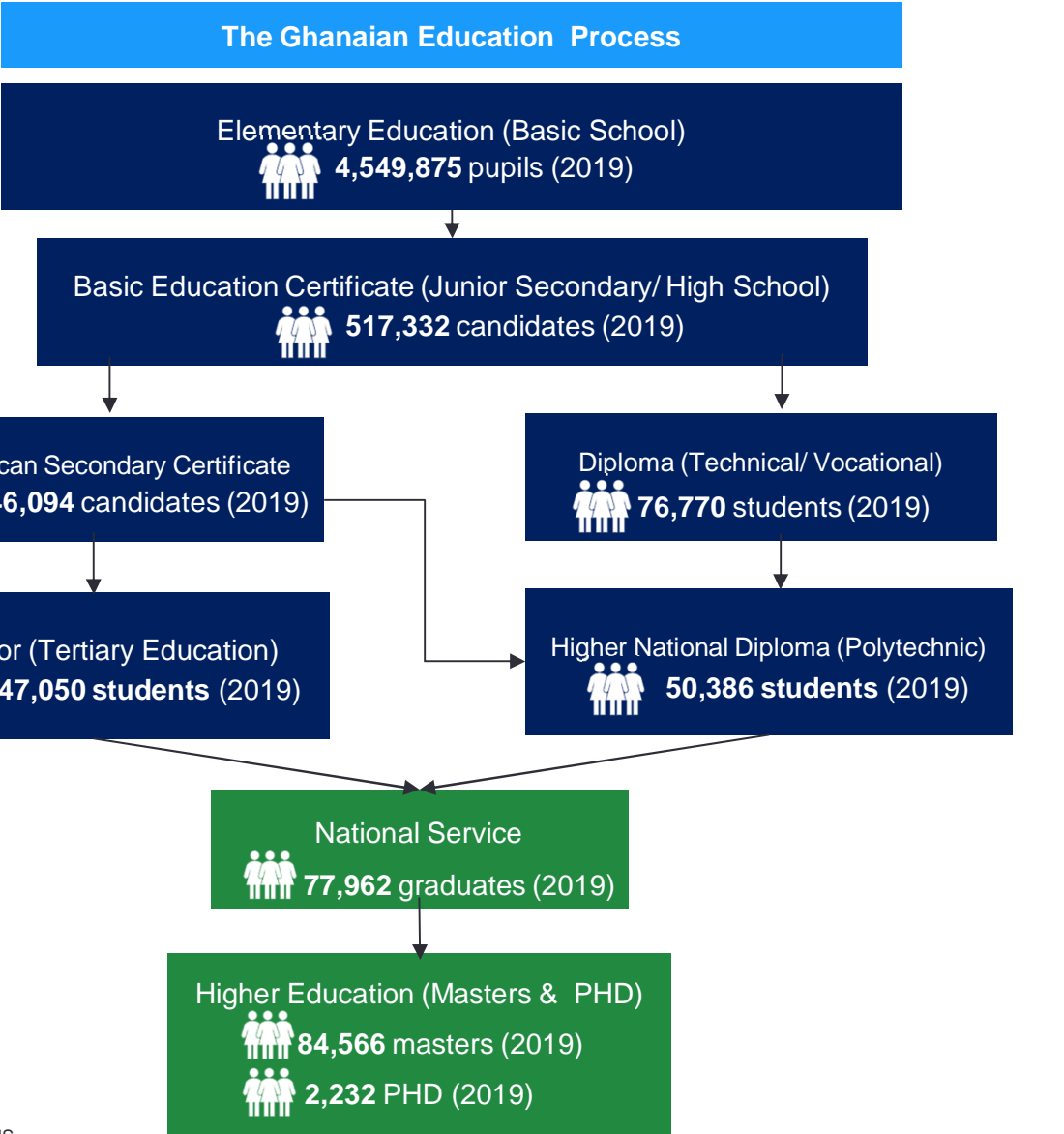
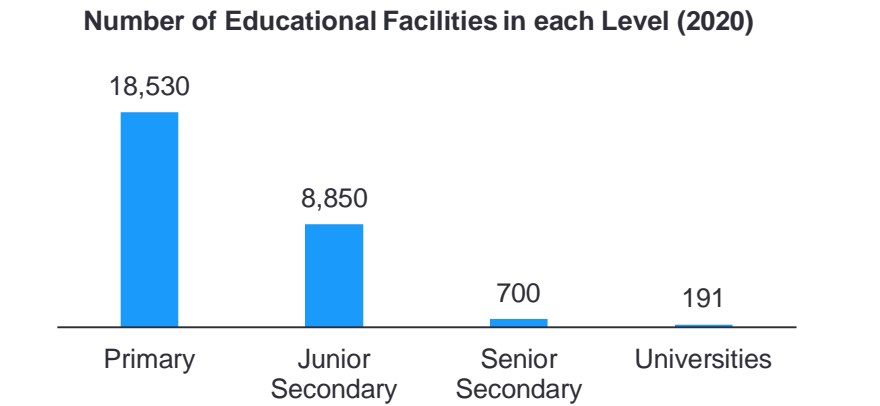
Sector overview

Sector overview: General overview

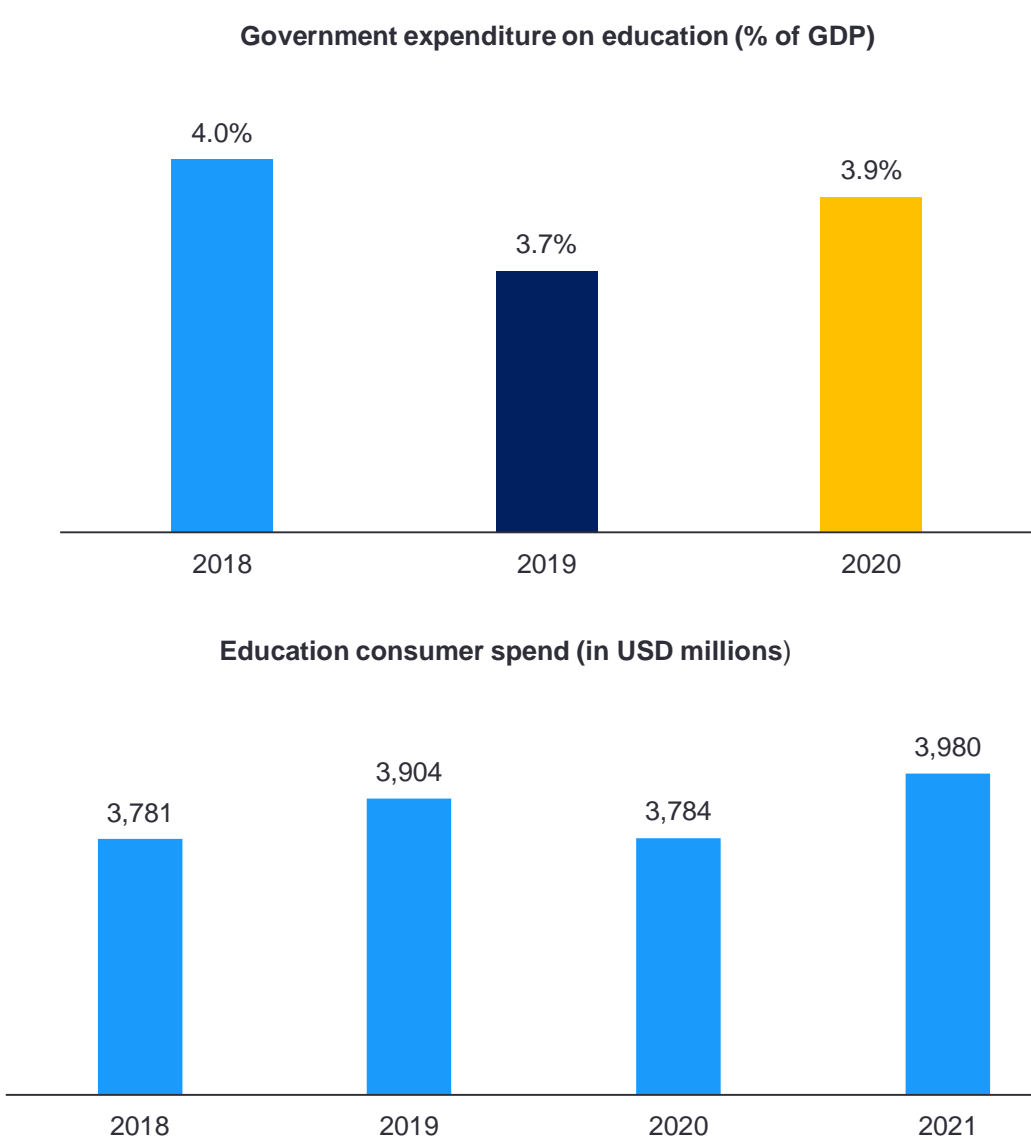
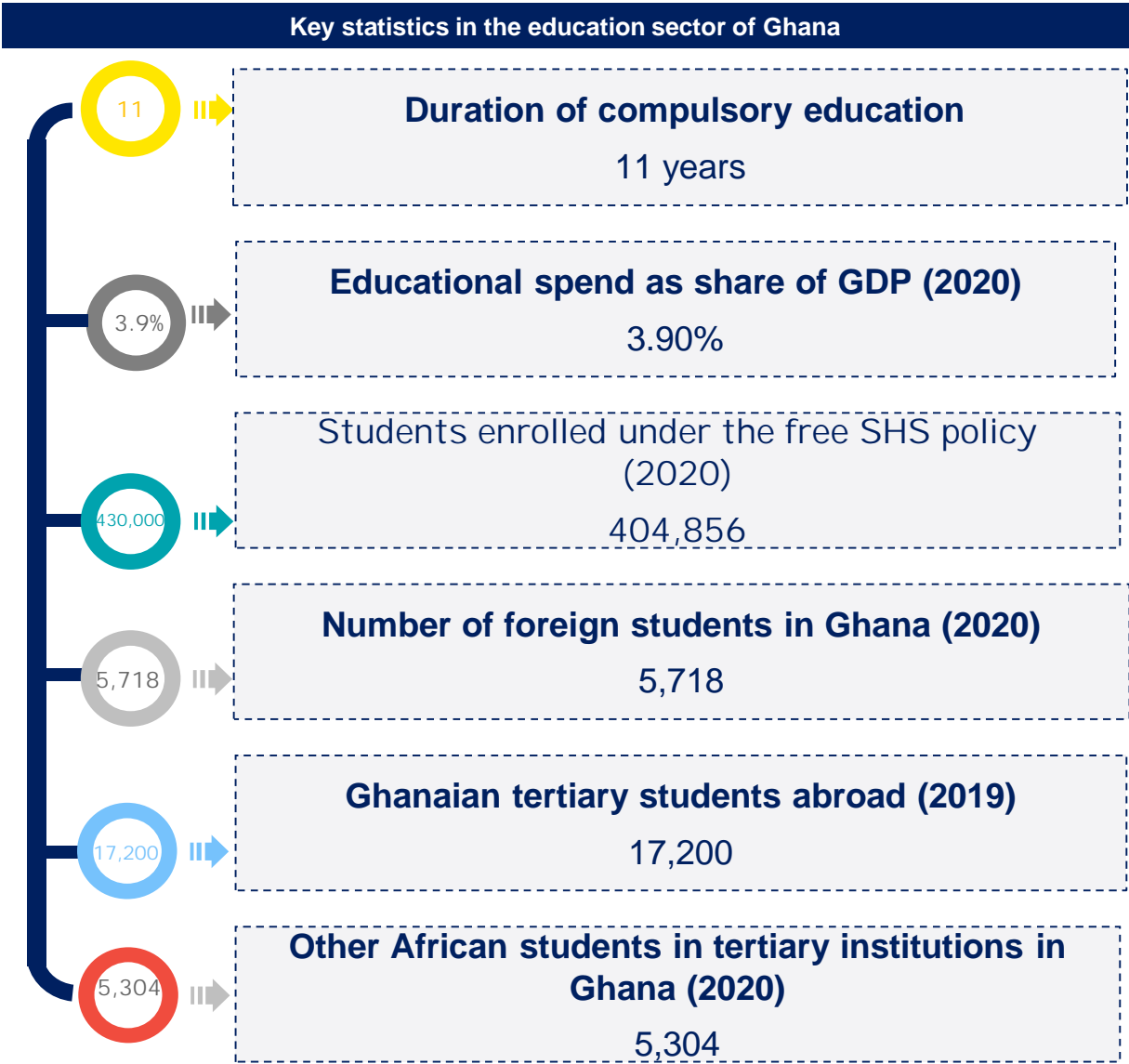
Overview of The Education System

- Ghana has a robust education system that caters to students at various levels. The official language of instruction is English, however local languages and French are taught as subjects.

| | | | |
|-------------------------------|--------------------|--------------|----------------------|
| Ghana's Education system | | | 6 – 3 – 3 – 4 System |
| | Level | No. of years | |
| Education Level tenure/period | • Primary | 6 years | |
| | • Junior Secondary | 3 years | |
| | • Senior Secondary | 3 years | |
| | • Tertiary | 4 years | |

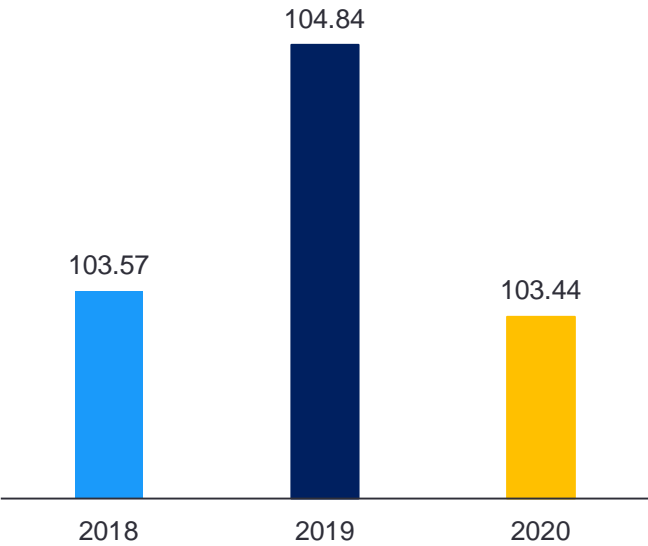


Sector overview: General overview

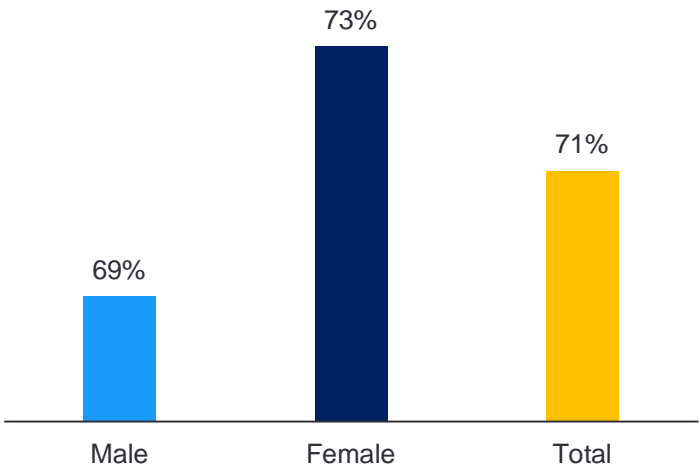


Sector overview: Basic education

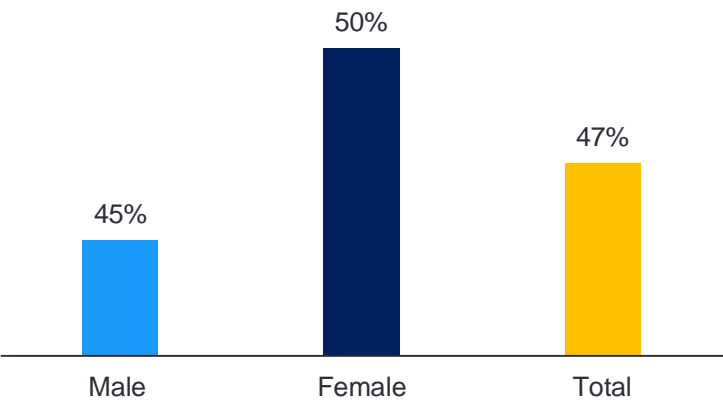
Gross primary school enrolment rates



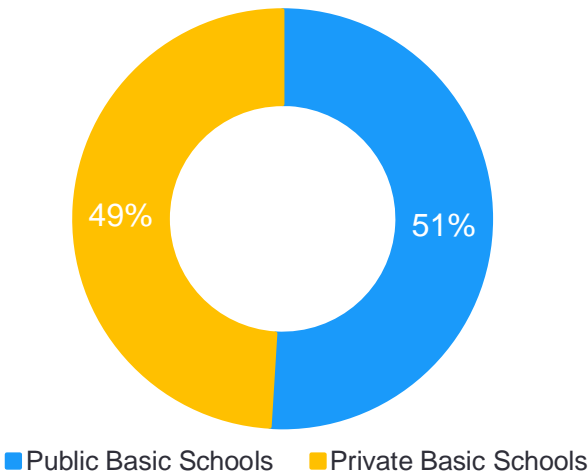
Primary completion rates 2020



Junior secondary completion rates 2020



Number of public & private basic schools (2020)



Basic education in Ghana



Duration of basic education : 11 years



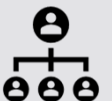
Ages of children: 4-15 years



Composition of basic education: Primary & Junior High/ Secondary School



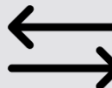
Net primary school enrolment rates: 84.4%



Rank in basic education: 1st out of 16 countries in West Africa according to Fitch (2022)



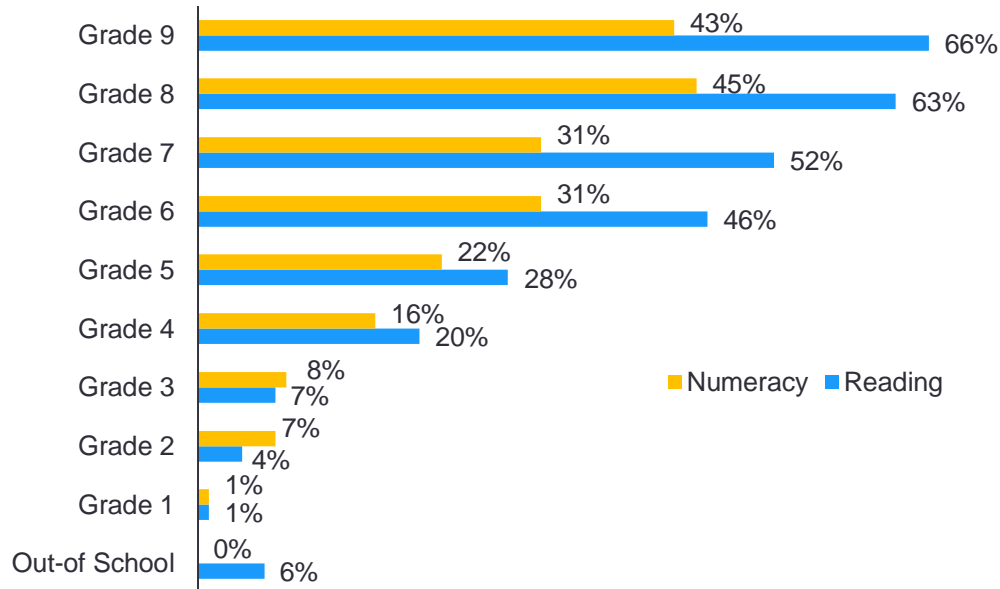
Literacy rate: 69.8%, which is the second highest in Africa, with the regional average being 47% (2021), according to the United Nations Educational, Scientific and Cultural Organisation (UNESCO).



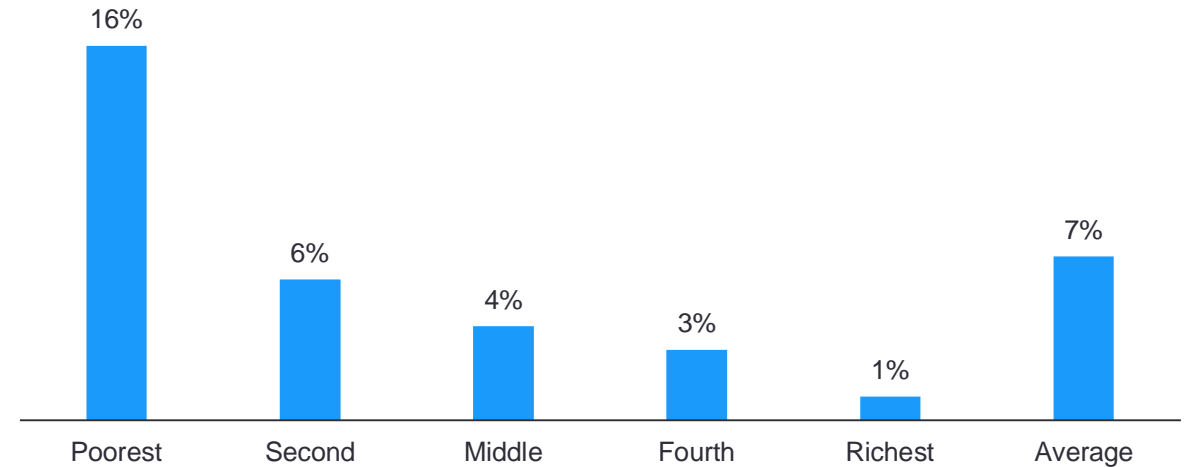
Junior high school ends with the Basic Education Certificate Examination (BECE)

Sector overview: Basic education

Share of children with foundation skills (7-14 years) 2020



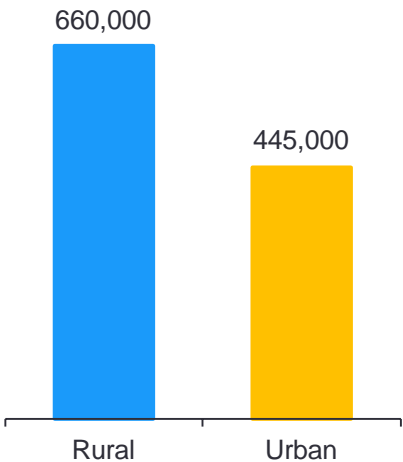
Primary out-of-school rates by wealth quintile (2020)



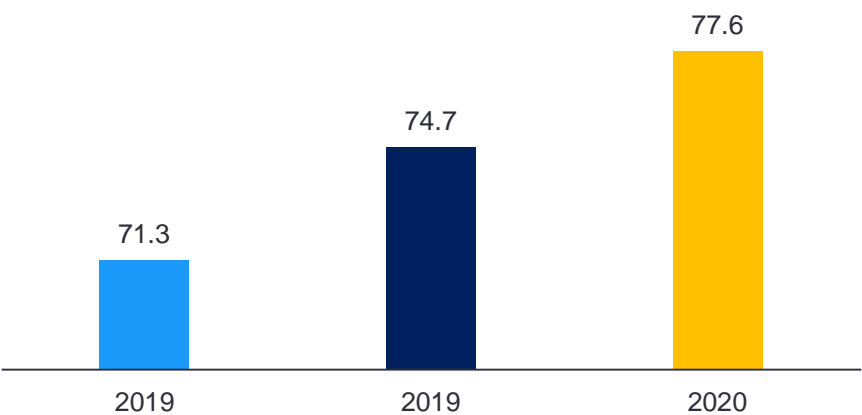
- Out-of-school children, which includes both those who have never attended school as well as those who did not attend school in the current year.
- **At the primary school level, an average of 7% pupils were out of school** , however some groups have higher out of school rates.
- Children from the poorest wealth quintile, for example, had greater out-of-school rates than their counterparts from other categories.
- **Only 7% of Grade 3 students have the required reading skills, and only 8% have the required numeracy skills.**

Sector overview: Secondary education

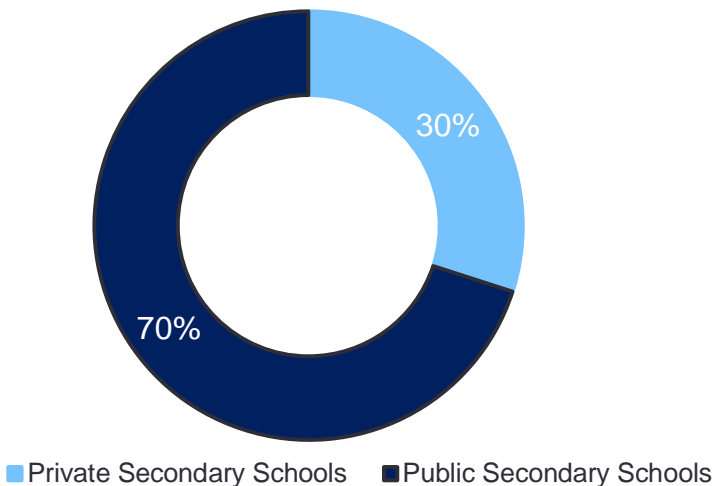
Headcount of children who did not complete secondary school (2020)



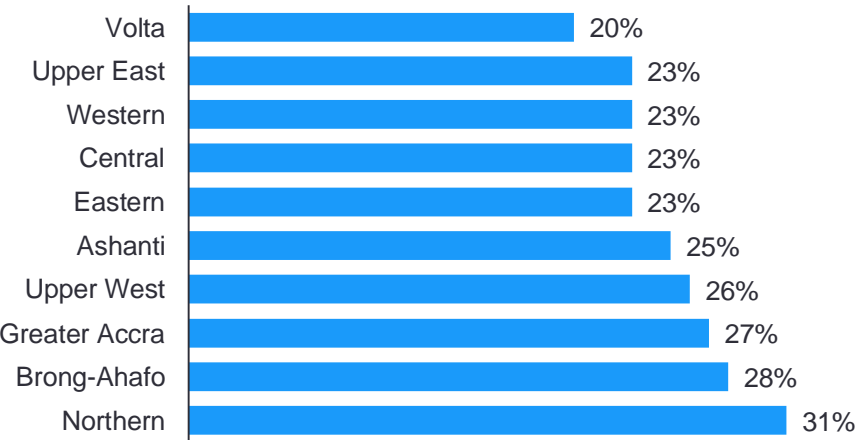
Gross enrolment rate in Ghanaian secondary schools



% of public & private secondary schools (2020)



% of children who complete secondary school by region (2020)



Secondary Schools In Ghana



Duration of secondary school: 3 years



Net enrolment rates : 58.3% (2022)



Rank of secondary Education: 3rd out of all countries in West Africa according to Fitch reports (2022)



Labour force: 20.6%, ranking 3rd in West Africa according to Fitch reports (2022)



Secondary school education ends with the West African Senior Secondary Certificate Examinations (WASSCE)

Sector overview: Secondary education

The Best Senior High Schools According to WASSCE Ranking as at 2020



St. James Seminary Senior High School

Average percentage of passes: 98.80%

St. James Seminary is a senior high school in Sunyani, the capital of the Bono region of Ghana and they have always featured or topped the list over the past years



St. Francis Xavier Junior Seminary

Average percentage of passes: 94.97%

St. Francis Xavier Junior Seminary located in Wa. They have always maintained more than a 90% average passes at the WASSCE.



Opoku Ware Senior High School

Average percentage of passes: 88.23%

Opoku Ware School, often referred to as OWASS, is an all-boys high school in Santasi, a suburb of Kumasi.



Wesley Girls Senior High School

Average percentage of passes: 87.60%

Wesley Girls' Senior High School (WGHS) is an educational institution for girls in Cape Coast, Ghana.

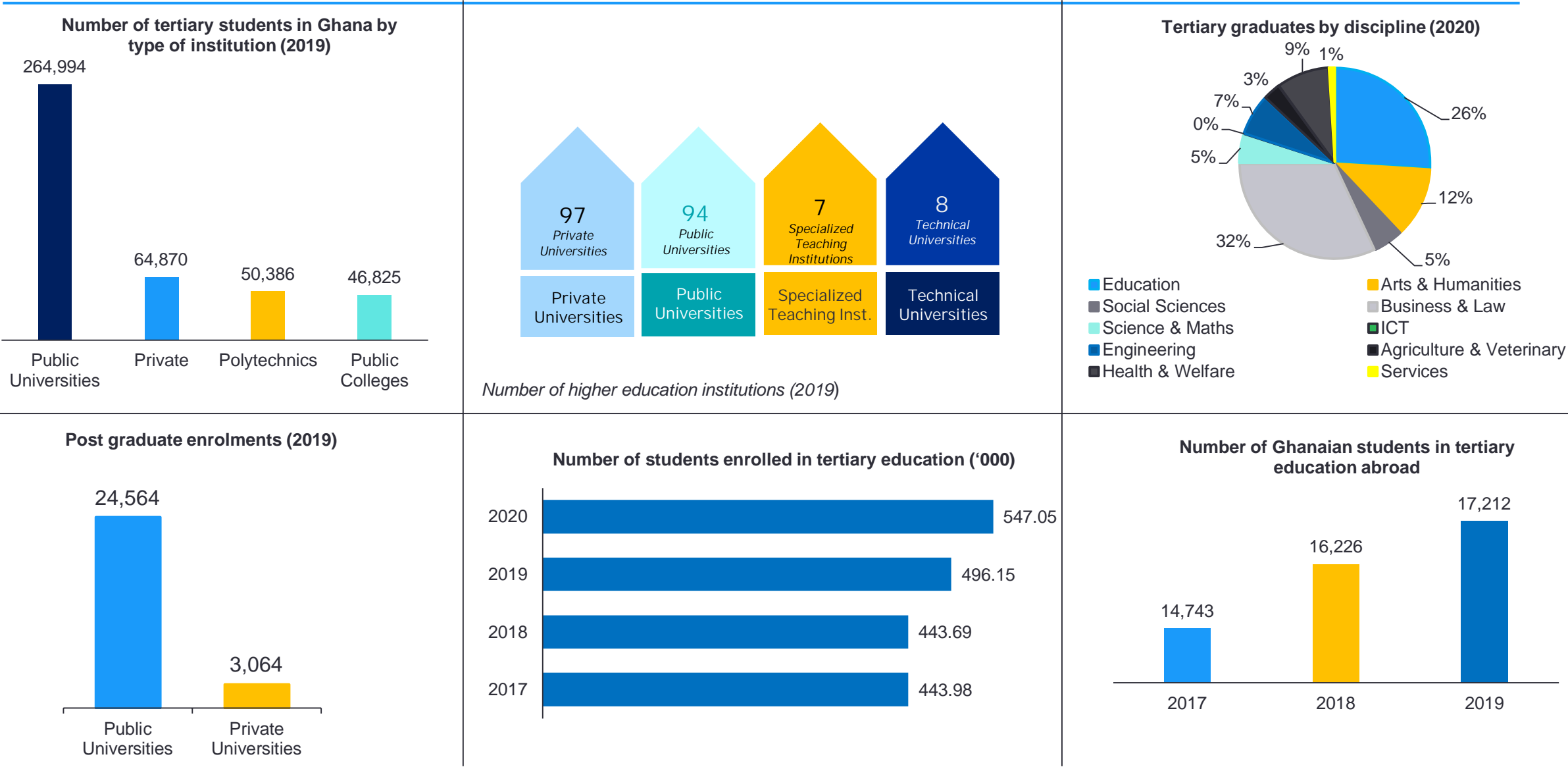


Holy Child Senior High School





Average percentage of passes: 87.53%

Holy Child School, also known as Angel's Hill, is a female second-cycle institution in Cape Coast in the Central Region of Ghana.

Sector overview: Tertiary education



Sector overview: Tertiary education

| Key players | Market segment focus | Location | Year of establishment | Website |
|---|----------------------|-----------------|-----------------------|--|
| Ashesi University  | Private | Berekuso, Accra | 2001 | www.ashesi.edu.gh |
| University of Ghana  | Public | Legon, Accra | 1948 | www.ug.edu.gh |
| Kwame Nkrumah University of Science & Technology  | Public | Kumasi | 1952 | www.knust.edu.gh |
| Central University  | Private | Accra | 1988 | www.central.edu.gh |

Tertiary Schools in Ghana



Net enrolment rate: 16.2%



The university education system produces around 109,874 graduates annually



Ghana scores 35.7 out of 100 for Tertiary Education in the Labour Market Risk Index, which ranks it 131st globally and first regionally in 2022



Ashesi University ranked number 1 in Ghana and amongst the world's top 300 universities by Times Higher Education in 2022. Ashesi and KNUST are the only Ghanaian universities in the world's top 300.

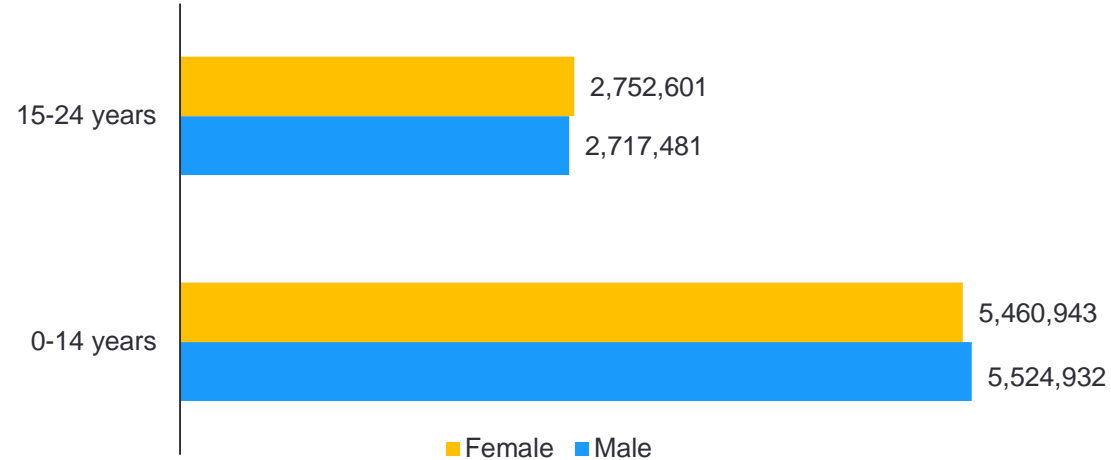


8% of Ghanaian university students study abroad

Demand and supply analysis

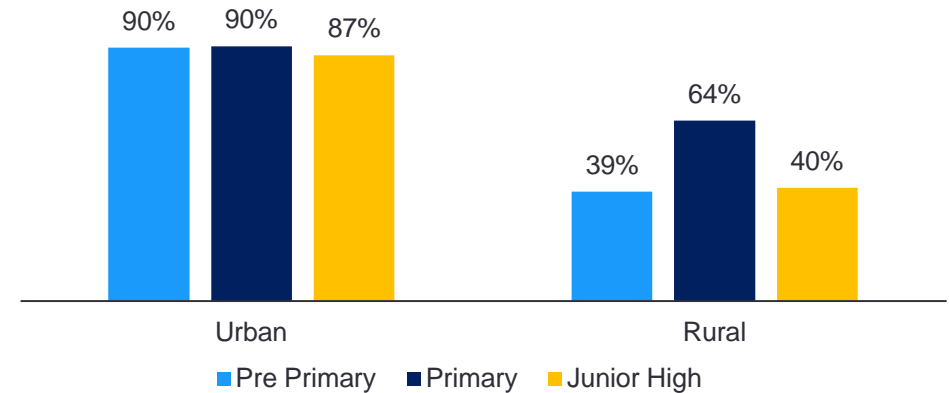
Demand of education

School aged population in Ghana (2021)

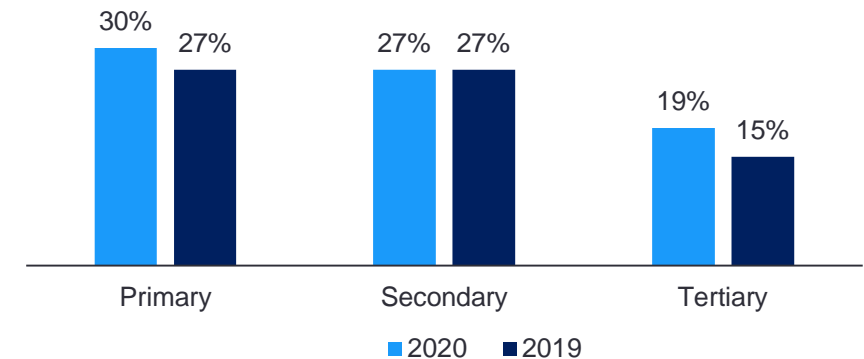


- Ghana has an estimated 11 million school-aged population, which is continually growing and indicates a significant need for quality education.
- While the government is working to improve public school access, many families are looking for quality education in the private sector.
- Enrolment in primary schools increased from 27% in 2019 to 30% in 2020. While both the private and public sectors have seen an increase in the number of institutions and students, private schooling is expanding at a considerably quicker pace.

Availability of basic education facilities in rural & urban areas in Ghana 2021



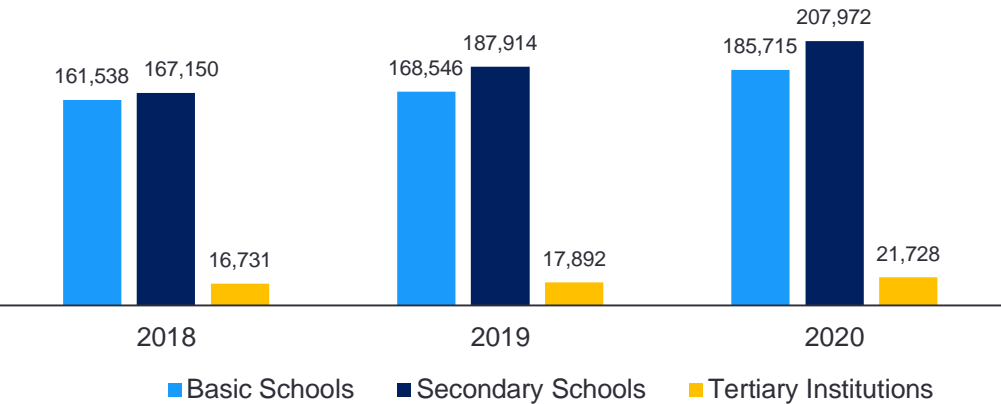
% of Private school enrolment at the various levels of education



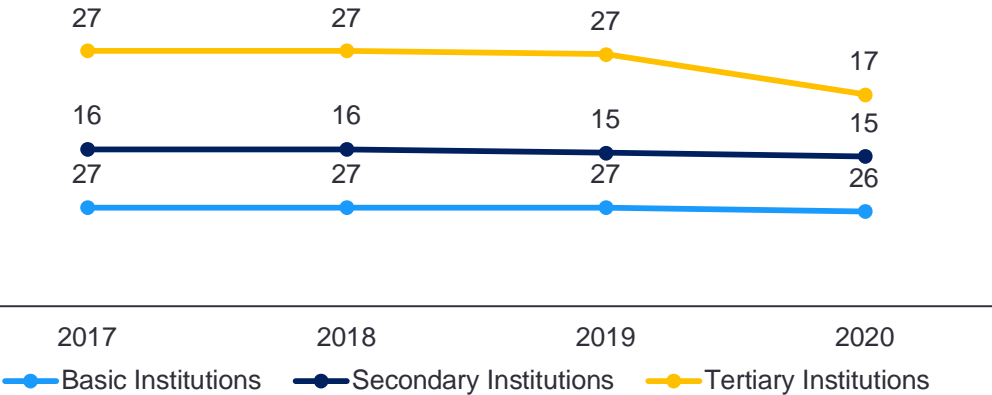
Demand and supply analysis

Supply of education

Number of teachers at the various levels of education in Ghana
2020

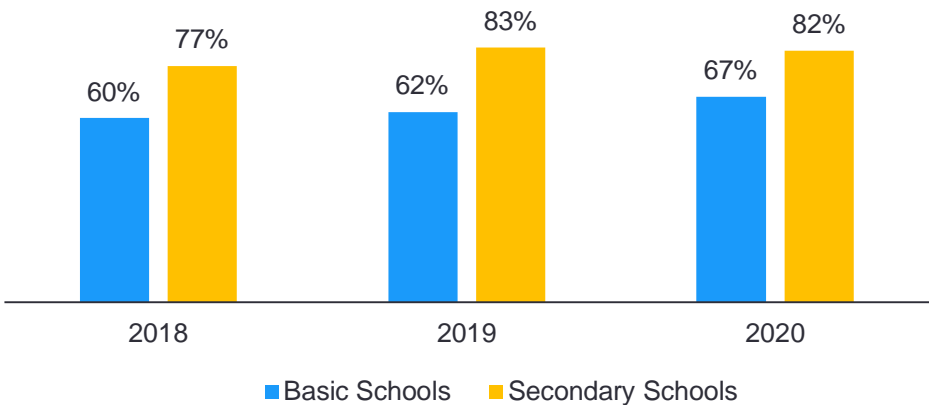


Student to teacher ratio at the various levels of education in Ghana



- Teacher supply, on the other hand, can be defined as the number of persons serving as teachers for a particular year in its broadest definition. In 2020, there were 185,715 elementary school teachers and 207,972 secondary school teachers.
- In basic schools, there is one teacher for every 27 pupils, while in secondary schools, there is one teacher for every 16 students.
- There has been an over-concentration of teachers in metropolitan regions, which has negatively impacted rural children. It is not so much a shortage of adequate teacher supply as it is a distribution issue. Thousands of public primary school classes in rural Ghana are devoid of teachers, resulting in 30 daily dropouts.

% of Trained teachers in basic & secondary schools



Key developments

01

One Teacher One Laptop Program

Ghana inaugurated its One Teacher One Laptop program on September 3, 2021, as part of the government's aim to better equip teachers with technical skills.

02

Vocational & Training Education

China committed USD130 million in Ghana's vocational education and training sector in May 2021. Ghana formed a partnership with China to increase the quality of technical and vocational education and resource availability. Automobile, civil, mechanical, and welding engineering, as well as ICT, will have their workshops upgraded.

03

Artificial Intelligence (AI) Research Centre

Google built its first African AI research centre in Accra in April 2019. The new centre will focus on AI research and applications and expected to attract top machine learning researchers and engineers

04

Free Senior High School (SHS) Policy

The President, Nana Addo Dankwa Akufo-Addo inaugurated the Free Senior High School policy in September 2017. Enrolment increased by 11% that year. The largest enrolment ever seen in the country was recorded in the 2017/18 academic year, with over 470,000 pupils enrolled in senior high school.


05


Ghana Colleges of Education (CoEs)


In April 2022, Government set up a GHS67m to fund the feeding and operation of Ghana's Colleges of Education (CoEs). This comes after the National Conference of Principals of Institutions of Education-Ghana (PRINCOF) expressed concern that the CoEs were struggling to feed teacher trainees at the 46 colleges due to a six-month funding gap.

Key partnerships





| | |
|-------------------------------|---|
| Investor Name |  International Finance Corporation WORLD BANK GROUP |
| Venture Investment is made in | Ashesi University |
| Year | 2020 |
| Amount | \$ 8.8 million |
| Nature of partnership | Loan |

| | |
|-------------------------------|---|
| Investor Name |  |
| Venture Investment is made in | Construction of senior high schools |
| Year | 2020-2024 |
| Amount | \$ 2.5 million |
| Nature of partnership | Corporate Social Responsibility |





| | |
|-------------------------------|---|
| Investor Name |  Department for International Development |
| Venture Investment is made in | The Ghana Accountability for Learning Outcomes (GALOP) |
| Year | 2020 |
| Amount | \$ 218.7 million |
| Nature of partnership | Grant |

| | |
|-------------------------------|---|
| Investor Name |  |
| Venture Investment is made in | Artificial Intelligence Research Centre |
| Year | 2019 |
| Amount | N/A |
| Nature of partnership | Corporate Social Responsibility |

Overview of industry regulators

| Regulatory agency | Scope of activity | Responsibilities | Nature of activity | | |
|---|-------------------|---|--------------------|-----------------------|--------------------|
| | | | Oversight function | Inspection/ licensing | Policy formulation |
|  Ministry of Education | General | Ensure the development of an educational system that focuses on promoting critical skills | ✓ | | ✓ |
|  Ghana Education Service | General | To ensure the implementation of educational policies and programs | ✓ | | ✓ |
|  National Council for Curriculum & Assessment | General | To develop a curriculum that ensures the quality of education. | ✓ | ✓ | |
|  National Teaching Council | General | To promote excellence and professionalism among teachers and managers of schools | ✓ | ✓ | |

Overview of industry regulators

| Regulatory agency | Scope of activity | Responsibilities | Nature of activity | | |
|---|---|------------------|---|-----------------------|--------------------|
| | | | Oversight function | Inspection/ licensing | Policy formulation |
|  | National Schools Inspectorate Authority | General | Ensure the the highest quality standards for quality education in public and private Pre-Tertiary Institutions. | ✓ | ✓ |
|  | The West African Examinations Council | General | To conduct examinations in the public interest | ✓ | ✓ |
|  | The Ghana Education Trust Fund | General | To enhance primary, secondary and particularly tertiary education. | ✓ | ✓ |
|  | National Service Scheme | General | Mobilize and deploy Ghanaian citizens 18 years and above for national development | ✓ | ✓ |

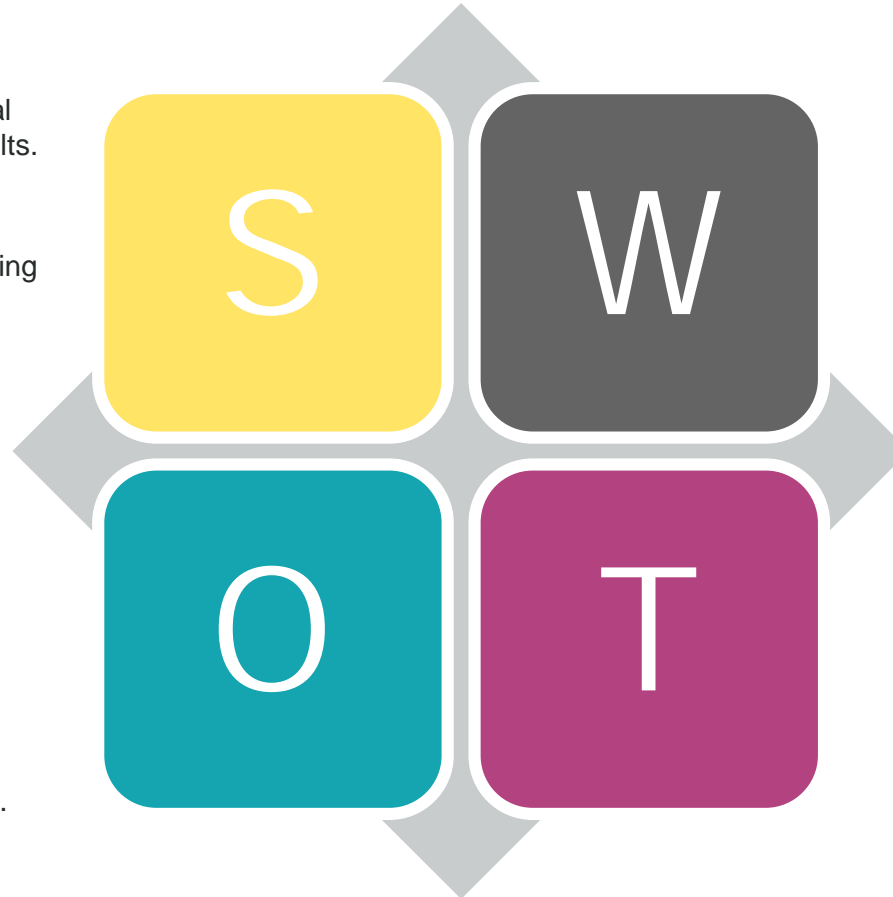
Sector SWOT analysis

Strengths

- ▶ Increased access to basic education
- ▶ Complementary education and other non-formal opportunities for out-of-school children and adults.
- ▶ Legacy of high-quality education leading to a good reputation in Africa.
- ▶ High quality teaching and learning materials being developed, produced and introduced.

Opportunity

- ▶ Strengthened institutional capacities and outcomes.
- ▶ Improved retention and transition of students.
- ▶ Improved use of public resources in education through efficiency savings and value for money.
- ▶ Improved effectiveness through accountable decentralization.



Weaknesses

- ▶ Teacher retention/deployment.
- ▶ Technical and management skills at local levels.
- ▶ Poor retention of pupils in basic cycle especially in deprived areas.
- ▶ Upsurge of enrolment in universities leading to escalating public costs
- ▶ Increasingly inequitable distribution of education benefits.

Threats

- ▶ Increased drop-out, drop-out rates remain at 8% for rural basic education students.
- ▶ Delays in payments of salaries of teachers.
- ▶ Inadequate funding for primary education.
- ▶ Teacher migration to urban areas affecting staff in deprived areas.
- ▶ Inequitable distribution of ICTs
- ▶ Graduate unemployment and disaffection.

A photograph of a classroom with several students. In the foreground, a young woman with dark hair in braids, wearing a green and white checkered school uniform, is focused on writing in a notebook with a blue pen. Behind her, other students in similar uniforms are visible, some looking towards the camera and others looking down at their work. The background is slightly blurred, showing more of the classroom environment.

03

Sector opportunities

Sector opportunities



Training of Teachers

- ▶ Rural areas continue to be disadvantaged by teacher distribution.
- ▶ At the primary level, the percentage of trained teachers is still relatively low. Only 31% of teachers in early childhood education are certified.
- ▶ Around 51% of primary school teachers have had training, whereas 66% of junior high school teachers have received training.



Infrastructure

- ▶ Despite the improvements Ghana has made in providing access to education for all, thousands of children still face obstacles to attending school and learning.
- ▶ Classes are overcrowded, and there are insufficient water and sanitation facilities.
- ▶ There are still children that attend school under duress today due to insufficient classroom blocks to accommodate the students.



Investments in Early-Childhood Education

- ▶ Recent research suggests that the first few years of life may be a particularly fruitful moment to intervene in the lives of low-income children.
- ▶ In rural areas, almost 61% of children aged 7 to 14 have no core reading and numeracy skills, affecting the country's literacy rate.



Improvement in ICT

- ▶ Improve the quality of education and training at all levels by using ICT to modernize the educational system and enhance access to education, training (particularly teacher professional development), and research resources and facilities.



Provision of School Supplies

- ▶ Access to high-quality educational supplies, including textbooks, is particularly problematic for students and instructors in the country's rural areas.
- ▶ Because they are in short supply, this makes both teaching and learning extremely challenging.



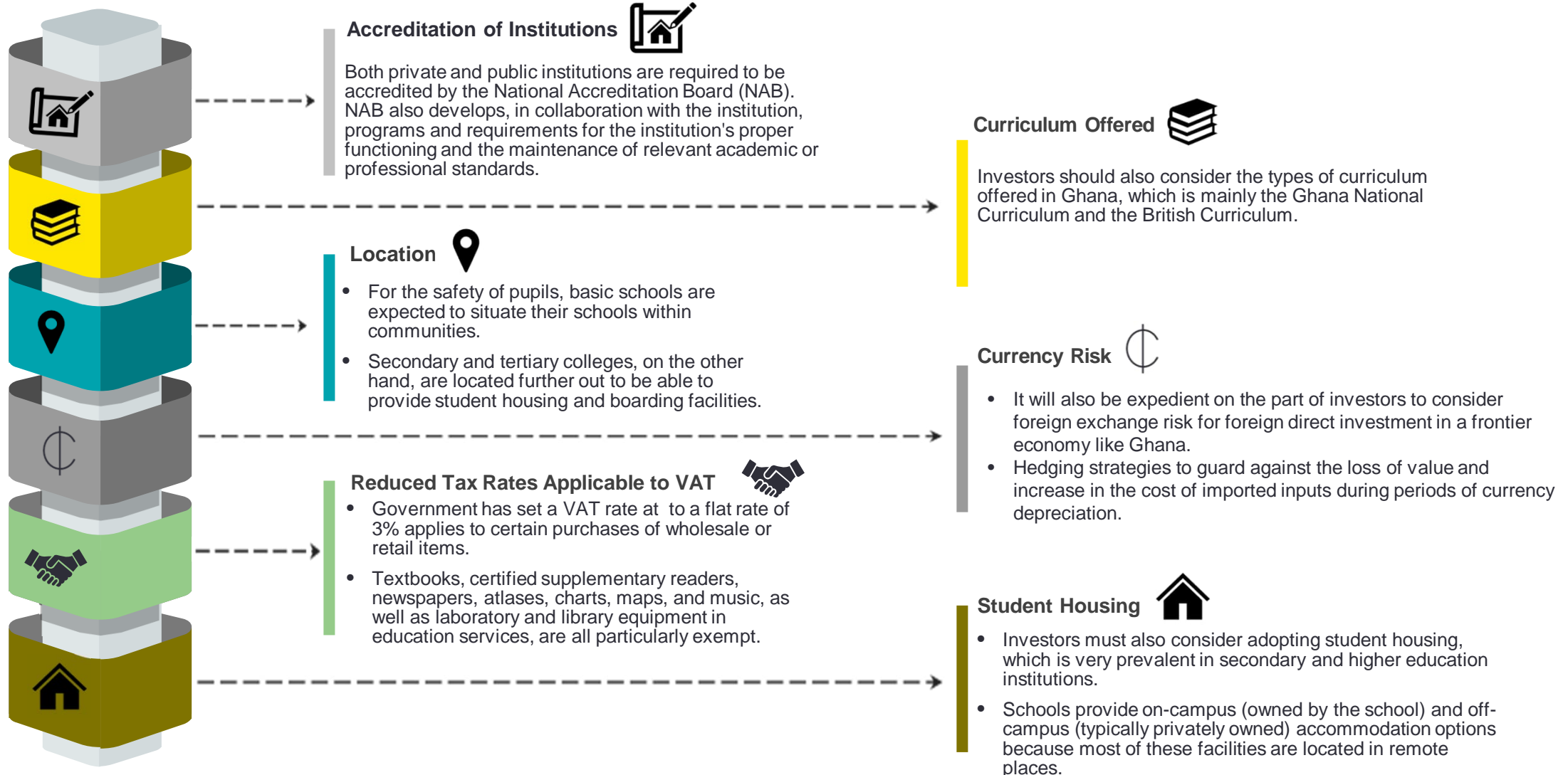
Investment in STEM

- ▶ Ghana has few graduates in the domains of science, technology, engineering, and mathematics (STEM). Engineering graduates accounted for just 7% of all graduates and science and maths graduates accounted for roughly 5%.
- ▶ This means that university graduates with STEM capabilities are scarce, and businesses in need of such workers will have a tough time finding qualified candidates locally.

04

Key investment considerations

Key investment considerations



A young woman with dark hair in braids, wearing a green and white checkered school uniform, is focused on writing in a notebook. She is holding a blue pen. In the background, other students in similar uniforms are visible, also working on their notebooks. The scene is set in a classroom with a blurred background.

05

Testimonials

Testimonials

“Nobel International Business School (NiBS) has been in operation since 2014. Over the years, we have graduated over 229 executives in our professional and academic doctorate programs. It is refreshing to say that the Ghanaian society and executives are gradually embracing the idea of being exemplary leaders and changing the status quo in various industries.

We are happy to be operating in Ghana with students across Africa. Opportunities exist for investments in nationwide penetration. We believe that investors will reap returns on their investments in Ghana and strongly recommend it.”

Nobel International Business School

A background image showing a group of students in a classroom, focused on their work. The students are wearing green and white checkered uniforms. The image is slightly blurred, with the focus on the student in the foreground.

06

Contact us

Key contacts

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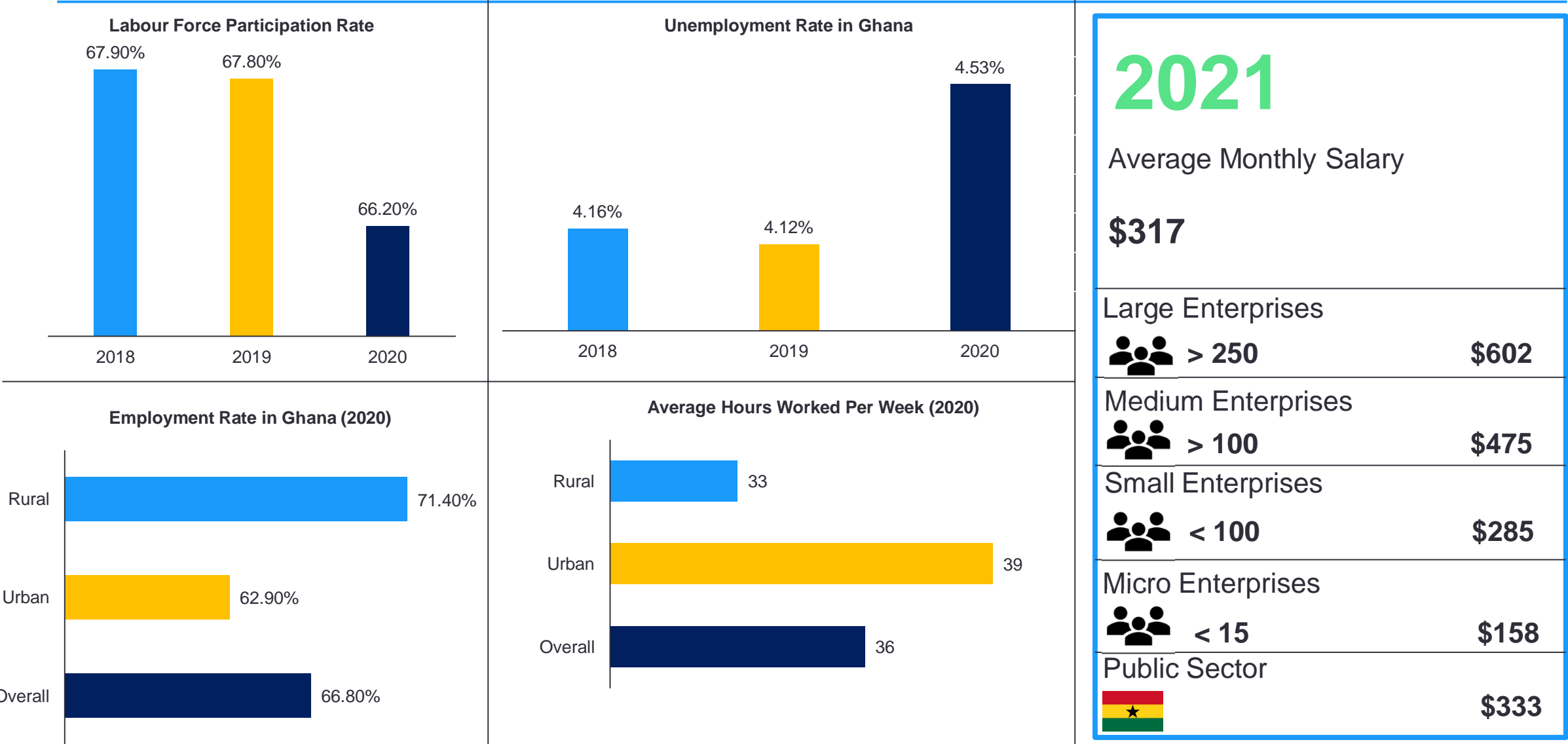
eugenia.okyere@gipc.gov.gh








07



Appendix

Appendix I: Labour Analysis



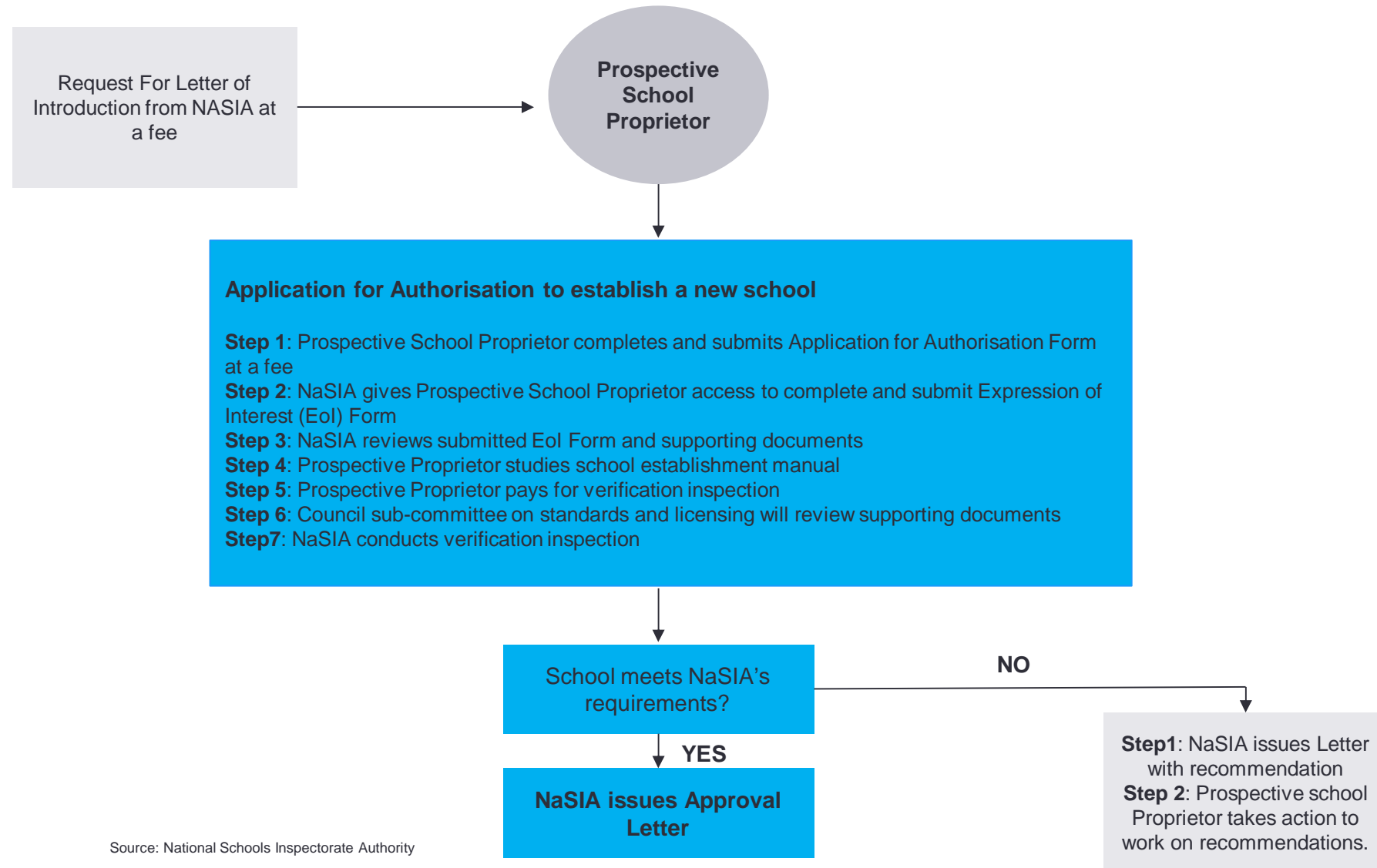
Appendix II: Sector Porter's Five Forces

| Threat | Severity of threat | Description |
|--------------------------------------|---|--|
| Threat of new entrants |  | <ul style="list-style-type: none"> ▶ As a result of relatively permissive government rules, the number of private educational institutions is increasing, resulting in increased competition. New universities have few obstacles, the most significant of which is that all institutions must meet national accreditation requirements. |
| Threat of substitutes |  | <ul style="list-style-type: none"> ▶ Prospective students can attend any institution they choose. Since there are so many schools to choose from, other schools' ability to raise costs is limited. ▶ Students who cannot afford private institutions have several options in the sector, including lower-cost options such as community schools and public universities. |
| Competitive rivalry |  | <ul style="list-style-type: none"> ▶ The intensity of competition faced by educational institutions in the country has influenced their strategy and creativity in recent years in order to attract local and international students. ▶ The huge increase in foreign fee-paying students, which is progressively becoming a key source of revenue for Ghana's private schools, exemplifies this. ▶ Most public colleges in Ghana have a high demand for their services, particularly among local students, which can be attributed to the fact that they have been in operation for a long time and are very inexpensive. |
| Bargaining power of suppliers |  | <ul style="list-style-type: none"> ▶ The main supplier power in education is highly skilled labour in the shape of lecturers, researchers, and administrators. The authority of teaching staff will, however, be determined by whether or not they are appointed to teach in schools. ▶ As there are so many teaching staff in the country, most of whom are selected by the government to teach in public schools, suppliers may not have much negotiating power. Private institutions, on the other hand, are few in comparison to public schools, and hence require less teaching staff. |
| Bargaining power of customers |  | <ul style="list-style-type: none"> ▶ Customers in the education sector are mainly parents and students who do not have the power to determine prices in schools. ▶ The government subsidizes many public institutions, making tuition affordable for parents and students. Private institutions, on the other hand, are preferred by parents who can afford them. |

 Low
  Medium
  High

Appendix III: Regulatory framework

GUIDELINES FOR ESTABLISHING A NEW SCHOOL FROM THE NATIONAL SCHOOLS INSPECTORATE AUTHORITY (NaSIA)



Appendix IV: Policy Initiatives: Free Senior High School (SHS) Policy

- Goal 4 of the United Nations Sustainable Development Goals (SDGs) states: “By 2030, ensure that all girls and boys complete free equitable and quality primary and secondary education leading to relevant and effective learning outcomes.”
- It has therefore been a priority of the government and the Ministry of Education to ensure that education is made free from basic to secondary to afford more children in Ghana the opportunity to access quality education.

- In September 2017, the Ministry achieved a major milestone with the implementation of the Free Senior High School program. That year, there was an 11% increase in enrolment, breaking records from previous years
- The Nana Akufo Addo lead government has given full effect to SDG 4.1 with the implementation of a Free SHS Policy. The programme, is anchored in the below pillars;



The Removal of Cost Barriers

- Remove Cost Barriers through the absorption of fees approved by GES council



Expansion of Infrastructure

- Expand physical school infrastructure and facilities to accommodate the expected increase in enrolment.



Improvement in Quality & Equity

- Improve quality through provision of core textbooks and supplementary readers, teacher rationalisation and deployment, etc.

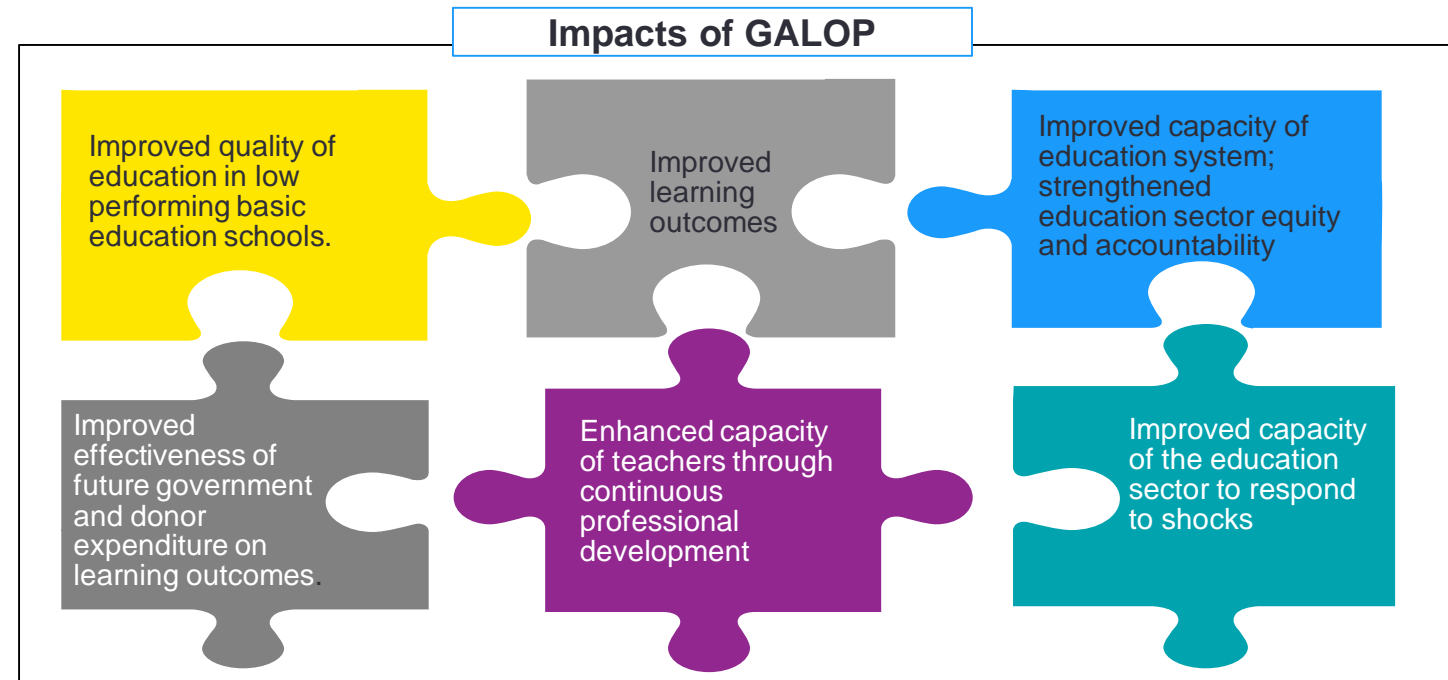


Development of Employable Skills

- Improve competitiveness of Ghanaian Students to match the best in the world.

Appendix V: Policy Initiatives: The Ghana Accountability for Learning Outcomes Project (GALOP)

- The Ghana Accountability for Learning Outcomes Project (GALOP) is a five-year project launched in 2020 whose goal is to improve education quality in low-performing basic education schools while also strengthening fairness and accountability in Ghana's education sector.
- GALOP focuses on the 10,000 lowest-performing elementary, middle, and high schools, as well as all 28 special institutions. It also focuses on improving the overall responsibility of the educational system.
- The total project amount is US\$218.7 million. It is jointly funded by the World Bank, Department for International Development (DFID) and the Global Partnership for Education (GPE).



Appendix VI: List of abbreviations

| | |
|--------|--|
| AfCFTA | African Continental Free Trade Area |
| BECE | Basic Education Certificate Examination |
| GDP | Gross Domestic Product |
| ICT | Information Communication Technology |
| NAB | National Accreditation Board |
| PHD | Doctor of Philosophy |
| SDG | Sustainable Development Goals |
| SHS | Senior High School |
| STEM | Science, Technology, Engineering & Math |
| UNESCO | United Nations Educational, Scientific and Cultural Organisation |
| WASSCE | West African Senior Secondary Certificate Examination |