BRITISH COUNCIL

Research

Market Intelligence Brief

Ghana

April 2024

Contents

1 Executive Summary

Ghana is a West African country, known for its natural resource wealth and young and fast-growing population. The population currently stands at around 33m and has more than doubled from 15.4m in 1990. Acknowledging the importance of educating its youth in order to benefit from a 'demographic dividend' in future, the government of Ghana has prioritised education within its budget over recent years, spending within the recommended international benchmarks for government spending on education up until 2022.

Accordingly, Ghana has made significant progress in improving access to education over the past decades. At primary level, the gross enrolment ratio stood at 98 per cent in 2021, up from 83 per cent in 2000. Meanwhile, at the secondary level, the ratio stood at 75 per cent in 2021, up strongly from just 35 per cent in 2000. This strong improvement in education participation within the country has led to significant improvement in education outcomes, with the country's youth literacy rate increasing from 71 per cent in 2000 to 93 per cent by 2020, which was well above the Sub-Saharan Africa average of 77 per cent, according to the World Bank. However, despite the impressive progress made in recent times, significant problems within the education system persist in the form of critical shortages of trained teachers, classroom facilities, and learning materials, particularly in rural regions.

Strong economic growth in the decade prior to the pandemic helped to fuel the expansion and development of the education sector. However, excessive spending and debt accumulation during the economic boom period, combined with the fallout from the Covid-19 pandemic and Russia-Ukraine conflict, drove Ghana into a severe economic crisis in 2022. Inflation surged while the cedi's value plummeted, with credit ratings firms such as Moody's downgrading Ghana to junk status. In December 2022, the government reached an agreement with the IMF for a US$3bn relief loan, with the first tranche of US$600m received in May 2023. The Ghanaian economy is showing signs of stabilisation thanks to the authorities' steadfast implementation of its IMF-supported economic programme, but the outlook for the Ghanaian economy will remain muted by historical standards in the medium term according to Oxford Economics.

According to estimates from UNESCO, just over 20,000 students from Ghana travelled abroad to study at the higher education level in 2021, making it the third largest outbound international student market in Sub-Saharan Africa, after Nigeria (85,000) and Cameroon (30,000). Since 2008, the volume of outbound students from Ghana has increased each year, doubling from 9,000 to 20,000 over the period. Historically, the US and the UK have been the most popular study destinations for outbound international students from Ghana. Although recent data are unavailable, prior to the pandemic China was also a leading market for Ghanaian outbound students, hosting in the region of 6,500 students.

The UK's recruitment of Ghanaian international students has been on a consistent upward trajectory over recent years, growing each year since 2015/16. In the years prior, growth had been on a downward trajectory due to a combination of factors including a fiscal crisis in the Ghana economy and the change in UK post-study work visas. Growth in Ghanaian international students in the UK picked up particularly strongly in the 2021/22 academic year, to a record high of almost 4,200, with the reintroduction of the Graduate Route from summer 2021 a key driving force behind the increase. Visa statistics show that student numbers continued to grow in 2022 and 2023, although the final quarter of 2023 saw fewer visa issuances than the same period of the previous year. Ghana is mostly a postgraduate market for the UK, owing primarily to a lack of high-quality domestic provision.

According to data from HESA, there were just under 3,000 Ghanaian students enrolled on UK TNE and distance learning courses in the 2021/22 academic year, which represents a decline of around 14 per cent compared to the previous year. The decline in 2021/22 was a continuation of a downward trend seen over recent years, with TNE and distance learning enrolments declining in each of the last five years, having peaked at just over 3,900 in 2016/17. Nonetheless, Ghana remains the UK's fourth largest market in Africa, behind Egypt (23,800), Nigeria (5,600) and South Africa (5,420). But while the strong demographic outlook and domestic capacity constraints make Ghana a strong candidate for future demand growth, the lack of a clear national TNE strategy and regulatory framework need to be addressed in order to entice more international universities into the market.

2 Introduction

This report was produced by the British Council's Education Insight Hubs, with external research support provided by Oxford Economics.[1] This report is designed to provide UK education institutions with unparalleled data, insight and analysis to support their international education strategies, recruitment activities and partnership development work. The report is also targeted at a UK and Ghanaian policy maker audience, by highlighting opportunities and barriers to education and research cooperation that exist between the two countries.

Using the latest data from the most reliable sources, this Market Intelligence Brief represents a window onto Ghana's education system and student population, as well as the economic and demographic factors, and policy priorities and developments that shape the country's international education outlook. The report examines various aspects related to the internationalisation of Ghana's education system – including student mobility, transnational education programmes and research collaboration – and highlights national-level education projects and partnerships between the UK and Ghana.

The information contained in this report is based primarily on desk-based research and data analysis, supplemented with insight and context provided by British Council colleagues on the ground in Ghana and the wider Sub-Saharan Africa region.

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Comments, queries and suggestions in relation to this report are welcome and may be submitted to **Alexis Brown**, **Head of Global Insight Hubs**, by email to alexis.brown@britishcouncil.org .

[1] www.oxfordeconomics.com/

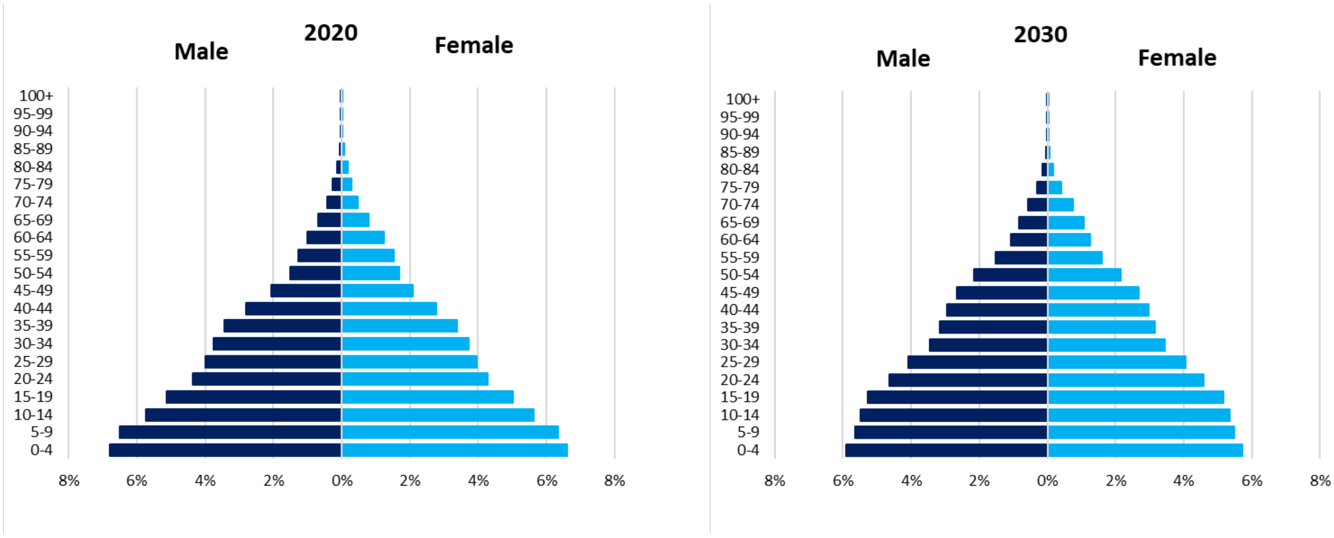
3 Macro Environment

3.1 People

With a population of around 33m, Ghana is a mid-sized African nation, similar in size to the likes of Angola and Mozambique, but much less populous than the largest African countries such as Nigeria, Ethiopia and Egypt. The country has experienced strong population growth over recent decades, with its population more than doubling from 15.4m in 1990 to 32.2m in 2020.[2] However, despite this, the rate of annual population growth has been trending downwards over this period, now standing at around 2 per cent per year due to declining fertility rates, which have fallen from 5.7 in 1990 to 3.6 in 2020.[3] Looking ahead, although the rate of annual population growth is expected to continue to slow gradually, the population of Ghana is expected to reach almost 39m by 2030 and 52m by 2050 according to the UN.

In common with many of its African peers, Ghana has an extremely young population, with a median age of just 21 and around half of the population under the age of 20. Looking ahead, by 2030, the 0-19 share of the total population is expected to fall marginally to 44 per cent. Meanwhile, the share of the population aged over 65 is expected to remain low, rising from around 3 per cent in 2020 to 4 per cent by 2030.

Figure 1: Ghana's population pyramid, 2020 and 2030



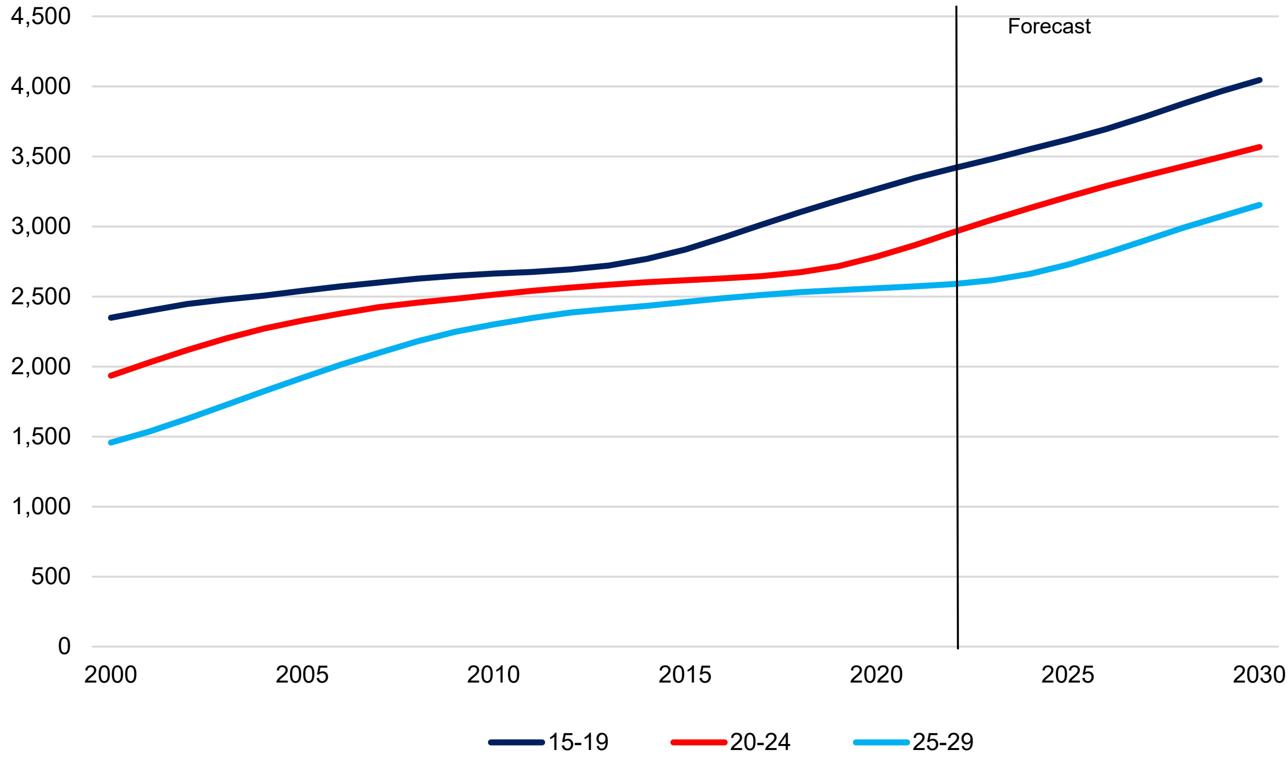
Source: UN Population Division

Looking specifically at the age bands of most relevance to UK higher education institutions (HEIs), each of these groups have grown strongly over the last two decades. Over this period, the student age population (15-29) grew from around 5.7m in 2000, to 7.5m by 2010 and further to almost

[2] World Population Prospects, *United Nations Population Division,* 2022, www.population.un.org/wpp/
[3] Fertility Rate: Ghana, *World Bank,* 2022, www.data.worldbank.org/indicator/SP.DYN.TFRT.IN

8.8m by 2021. Looking ahead, robust growth in the student age population is expected to continue, with the population projected to reach 10.8m by the end of the decade.

Figure 2: Ghana's student age population (000s)



Source: UN Population Division

Although fast-paced population growth can create economic opportunity, it has also put significant pressure on Ghana's education system, with overcrowded classes, inadequate water and sanitation facilities and a lack of trained teachers and schoolbooks all major issues.[4] Nonetheless, significant progress has been made in recent times, particularly at primary education level. If Ghana is able to continue to make progress in children's access to education, this will help to create a well-educated workforce ready to contribute to Ghana's development and will allow the country to take advantage of a 'demographic dividend', which is the accelerated economic growth that results from a decline in a country's birth and death rates and the subsequent change in the age structure of the population. Specifically, increased tax revenues from the growing working-age population should help the government to invest in the required infrastructure to boost productivity and long-term economic growth.

According to the World Bank, approximately 58 per cent of the Ghanaian population live in urban areas as of 2021, which is well above the Sub-Saharan Africa average of 42 per cent. There are

[4] Education: Ghana, *UNICEF*, 2023, www.unicef.org/ghana/education

two cities in Ghana with a population in excess of 1m people, which include the capital city, Accra (1.9m) and Kumasi (1.5m).[5]

The majority of the Ghanaian population is Christian (71 per cent), while Muslims account for approximately 20 per cent. English is the official language in Ghana but the country has over 50 indigenous languages, of which Asante and Ewe are the most widely spoken.[6] Education is provided in 11 of these languages until the third year of primary school, after which English is used as the medium of instruction.[7]

According to the English First (EF) English Proficiency Index, Ghana has a “moderate level” of English proficiency, ranking 41st out of the 111 countries reported. Compared to its African peers, Ghana performs favourably, ranking 4th out of the 20 African countries included in the index, only behind South Africa, Kenya and Nigeria.[8]

3.2 Economy

Ghana is classified as a lower-middle income economy, with the economy having undergone rapid development since the Global Financial Crisis (GFC) in 2008. Before the GFC, the country was well known for being the second-biggest cocoa producer in the world, but the economy has since diversified, transforming into an industrial powerhouse in the West African region. More specifically, the country started producing and exporting Brent crude oil in 2010, which enabled the economy to record remarkable levels of growth in the following years. Meanwhile, the country has taken advantage of its vast gold reserves and ramped up production to surpass South Africa as the continent’s biggest gold producer in 2019. As such, despite numerous challenges which included the commodity price plunge in 2015, Ghana managed to achieve astonishing economic growth of 7.3 per cent per annum during the previous decade (2010-19).

In 2020, in common with most countries around the world, the Covid-19 had a significant impact on the economy, with annual growth slowing to just 0.3 per cent, which was the weakest rate of annual economic growth recorded since the 1980s. However, despite a slightly bumpy recovery, growth accelerated significantly to just over 5 per cent in 2021 with GDP and employment levels comfortably surpassing pre-pandemic levels by the end of the year.

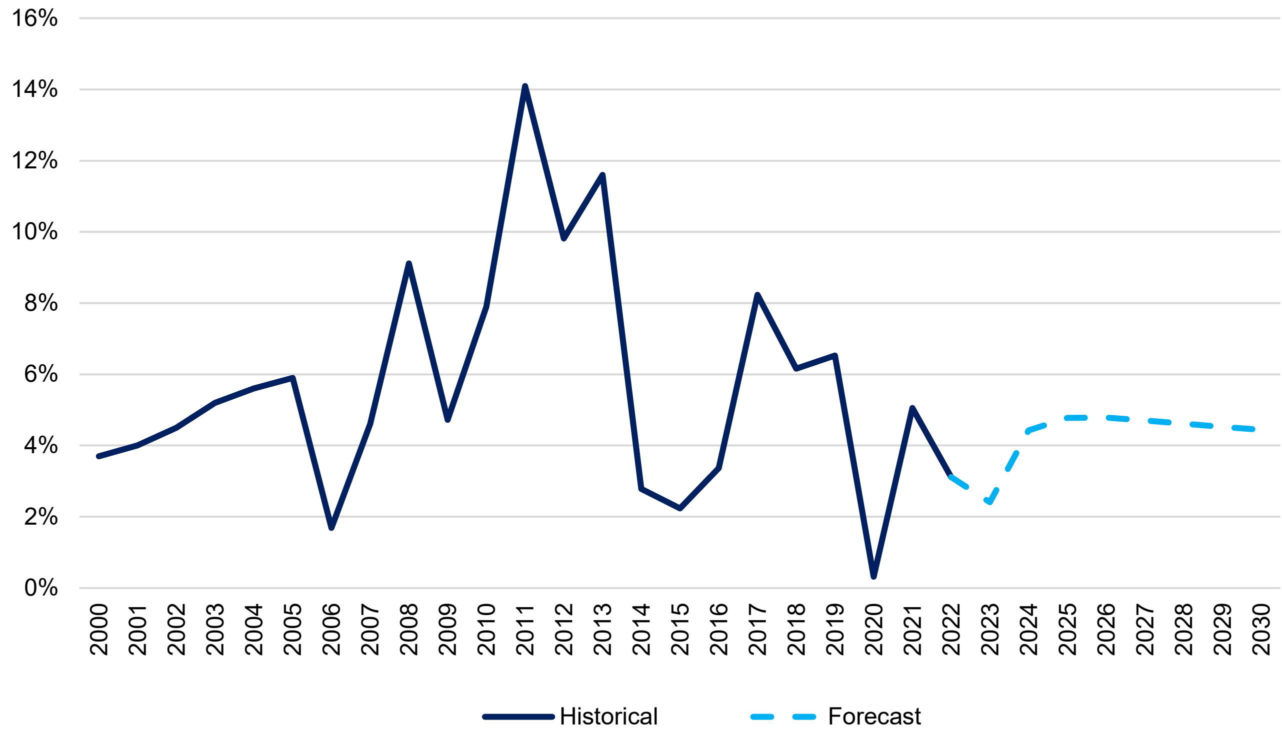
Nevertheless, excessive spending and debt accumulation during the economic boom period, combined with the fallout from the Covid-19 pandemic and Russia-Ukraine conflict, drove Ghana into a severe economic crisis in 2022. After having been in single digits for several years, inflation surged to average over 30 per cent in 2022 and accelerated further to average almost 40 per cent in 2023. At the same time, the cedi plummeted in value, causing a sharp increase in the value of its dollar denominated debt. In the middle of this economic storm, credit ratings firms such as Moody’s downgraded Ghana to junk status and the country was forced to turn to the International Monetary Fund (IMF) for relief. In December 2022, the government reached an agreement with the IMF for a US$3bn loan, with the first tranche of US$600m received in May 2023.

[5] Population of cities in Ghana, *World Population Review*, 2023, www.worldpopulationreview.com/countries/cities/ghana
[6] Ghana, *CIA World Factbook*, 2022, www.cia.gov/the-world-factbook/countries/ghana/
[7] Language of instruction country profile: Ghana, *USAID*, 2020, pdf.usaid.gov/pdf_docs/PA00X9JT.pdf
[8] Ghana, *English First*, 2022, www.ef.com/wwen/epi/regions/africa/ghana/

The Ghanaian economy is showing signs of stabilisation thanks to the authorities' steadfast implementation of its IMF-supported economic programme, which aims to restore macroeconomic stability, secure debt sustainability, and lay the foundations for higher and more inclusive growth. Specifically, the Ghanaian authorities have been taking bold steps to restore macroeconomic stability, including through their budgets for 2023 and 2024 which emphasise fiscal consolidation and sound public finances. Alongside this, the Bank of Ghana has appropriately increased interest rates. Although inflation remains high, it is headed in the right direction and was down to 23 per cent in February 2024 from a record high of 54 per cent in December 2022. Linked to this, the currency has been less volatile over recent months and international reserves are increasing.[9]

However, despite this strong progress, according to Oxford Economics' latest forecasts, the economic growth outlook in Ghana will remain subdued. Growth of around 2.4 per cent is estimated for 2023, recovering to above 4 per cent per year in the medium-term, which is well below the average rate of growth seen prior to the pandemic.

Figure 3: Ghana's real GDP growth



Source: Haver Analytics / Oxford Economics

In early 2022, the Ghanaian cedi was trading just above 6 per US$. However, by late November, it had plummeted to almost 15 cedi per US$ as the economic crisis deepened. The agreement of

[9] Ghana: Transforming a crisis into a journey toward prosperity, *IMF*, 2024, www.imf.org/en/News/Articles/2024/01/29/cf-ghana-transforming-a-crisis-into-a-journey-toward-prosperity

the IMF loan has encouraged some recovery, with the cedi currently trading at around 13 per US$. However, according to Oxford Economics, while a much greater degree of exchange rate stability is expected, with structural fragilities remaining the cedi is expected to persistently depreciate against both the dollar and pound in the years ahead, trading at around 18 per US$ and 13 per GBP by 2030. While improved stability in the value of the cedi over the coming years is to be welcomed, the scale of depreciation seen during 2022 has significantly increased the cost of international study for prospective Ghanaian international students, which is likely to act as a drag on outbound student flows from the country in the years ahead.

3.3 Government and education policy

Ghana is a presidential representative democratic republic, whereby the president is both head of state and head of government.[10] The government is a multi-party system in which the cabinet contains approximately 20-25 members, appointed by the president. The president is elected, via a public vote, for a four-year term, with the possibility of re-election for one further term.

Ghana entered into a democratic dispensation in 1992, after the Provisional National Defence Council (PNDC) provided a new constitution and held elections. John Jerry Rawlings, the PNDC leader, won power in 1992 and 1996. John Kufuour, leader of the New Patriotic Party (NPP), succeeded Rawlings after winning a majority vote in the 2000 general election. He served two terms before the National Democratic Congress (NDC) won the presidency in 2008, with the election of John Atta Mills. The latter died in office and was replaced by Vice President John Dramani Mahama, who won the 2012 election by a narrow margin in the first round. The 2016 election, with the NPP's Nana Akufo-Addo winning, again saw a smooth handover in power and showed why Ghana is one of the most admired democracies on the African continent. Mr Akufo-Addo was re-elected for another term in office in the 2020 elections, with a narrow victory margin against his predecessor, Mr Mahama.

Education in Ghana is centrally administered by the Ministry of Education (MOE) in Accra which oversees several different agencies that are responsible for much of the practical implementation of state-level policies devised by the MOE. One of these agencies is the Ghana Education Service (GES), responsible for the school system and pre-tertiary technical and vocational education and training (TVET). The GES inspects and supervises pre-tertiary education institutions and devises curricula and teacher education standards in the school and TVET systems. Meanwhile, the Ghana Tertiary Education Commission (GTEC) is the main agency in charge of higher education in the country. The National Council for Tertiary Education (NCTE) and the National Accreditation Board (NAB) were merged under the new Education Regulatory Bodies Act 2020 (Act 1023) to form the GTEC. Guidelines by the MOE and its agencies are implemented locally by government offices in Ghana's regions, as well as by districts offices.[11] The current Minister of Education is Dr Yaw Osei Adutwum.

The MOE's Education Strategic Plan (ESP) 2018-30 provides a 12-year roadmap for education in Ghana. There are three defining themes running through the ESP. The first is the imperative

[10] Republic of Ghana, *GhanaWeb*, 2023, www.ghanaweb.com/GhanaHomePage/republic/
[11] Education in Ghana, *World Education News and Reviews*, 2019, https://wenr.wes.org/2019/04/education-in-ghana

to focus on improved learning outcomes. The second defining theme is the recognised need to prioritise policies and activities in the sector, given the constraints of capacity and funding. To address this the MOE has developed a “lens for prioritisation” through which all proposed policies and interventions must be viewed to ensure they are working towards the agreed goals in the best manner possible. The third theme of the ESP is the focus on the efficiency of the education system and a willingness to introduce or reform policies to ensure high-quality results with the resources available. With this is a renewed emphasis on the need for strong accountability mechanisms and a sector-wide framework to hold actors to account appropriately.[12]

The government of Ghana has prioritised education within its budget over recent years, and between 2017 and 2023, the average budget allocation to education as a share of GDP was around 4 per cent. Meanwhile, education’s share of total government expenditure over the same period was just over 17 per cent. According to both methods of measurement, Ghana’s spending on education falls within the recommended international benchmarks for government spending on education, which are 4-6 per cent of GDP and 15-20 per cent of total government expenditure. However, reflecting the current economic and fiscal climate within the country, the allocation to the education sector in the 2023 budget is the lowest proportion of government spending allocated in over a decade. The 2023 education budget as a share of GDP is 3.1 per cent and forms only 13 per cent of total government expenditure for 2023, both of which fall below international recommendations for education spending.[13]

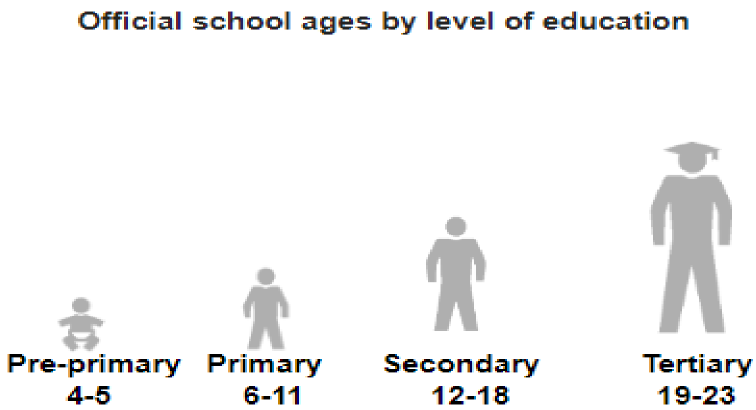
[12] Education Strategic Plan 2018-2030, *Ministry of Education*, 2018, www.globalpartnership.org/sites/default/files/2019-05-education-strategic-plan-2018-2030.pdf
[13] Analysis of the 2023 Education Budget, *Ghana Education*, 2023, www.ghanaeducation.org/analysis-of-the-2023-education-budget-education-gets-lowest-budget-allocated-in-over-a-decade-africa-education-watch/

4 Domestic Education Environment

4.1 Overview

The education system in Ghana is built around four main stages: pre-primary, primary, secondary, and tertiary education. The secondary education stage is further divided into two stages, namely junior secondary and senior secondary, each of which last three years. Basic education, which lasts up until the completion of junior secondary, is compulsory for all Ghanaian children, but senior secondary education is not. English is the main formal language of instruction at all levels of education within the country, although indigenous languages are also used for the first three years of primary school depending on the region.[14]

Figure 4: Official school ages in Ghana, by level of education



Source: UNESCO

Ghana has made significant progress in improving access to education over the past decades. At primary level, the gross enrolment ratio stood at 98 per cent in 2021, up from 83 per cent in 2000. Meanwhile, at the secondary level, the ratio stood at 75 per cent in 2021, up strongly from just 35 per cent in 2000. This strong improvement in education participation within the country has led to significant improvement in education outcomes, with the country's youth literacy rate increasing from 71 per cent in 2000 to 93 per cent by 2020, which was well above the Sub-Saharan Africa average of 77 per cent, according to the World Bank.[15]

However, despite the impressive progress made in recent times, significant problems within the education system persist in the form of critical shortages of trained teachers, classroom facilities, and learning materials, particularly in rural regions. Children from hard-to-reach and low-income households must make challenging daily commutes to get to school, and in some cases, children lack access to formal classroom settings. More positively, and in contrast to many of its Sub-Saharan African peers, gender inequality is not a significant issue in Ghana. The above-average

[14] Language of instruction country profile: Ghana, *USAID*, 2020, pdf.usaid.gov/pdf_docs/PA00X9JT.pdf
[15] Literacy rate, youth total, *World Bank*, 2023, www.data.worldbank.org/indicator/SE.ADT.1524.LT.ZS

gender equality seen in Ghana's education system is owed largely to major educational reforms in 1987 and 1992, that made basic education free and compulsory and, importantly for females, reduced the duration of pre-tertiary education. Prior to these reforms, many females would have dropped out of school early to get married.

4.2 Early years, primary, secondary

In 2008, Ghana added two years of pre-primary education as part of its constitutional commitment to Free and Compulsory Universal Basic Education (FCUBE). However, as of 2019, more than 400,000 children – approximately 1 in 4 pre-primary age children – were still not enrolled in kindergarten. Wealth inequality is a major factor, with a UNICEF report finding that children from the wealthiest households in Ghana are nine times more likely to attend pre-primary education than those from the poorest.[16] The MOE has set the goal of providing all children with access to quality early childhood development, care, and pre-primary education by 2030, as part of ESP 2018-30.

Primary education in Ghana begins at the age of six and is free of charge at public schools. However, even public schools charge fees for various items like teaching materials or uniforms, meaning that primary education is not entirely free for students. Private schools have increased in popularity in recent years, particularly in rural areas where government provision is lacking. The percentage of children enrolled in private primary schools increased from 17 per cent in 2000 to 30 per cent in 2020, according to UNESCO data.

The primary school curriculum focuses on developing basic reading and writing abilities, arithmetic and problem-solving skills. The subjects taught include English, local languages in early grades, mathematics, social studies, integrated science, arts, physical education, and civics. Primary education concludes with the completion of grade six.

Junior secondary education is open to all students who complete elementary education – there are no national-level entrance examinations. It lasts three years (grades seven to nine) and concludes with the Basic Education Certificate Exam (BECE). Conducted by the West African Examination Council in June each year for ninth graders who have been approved by the Ghana Education Service to sit for it, the BECE subjects include English, Ghanaian language and culture, social studies, integrated science, mathematics, design and technology, religion and civics, information technology, as well as French as an optional subject. The majority of junior secondary graduates, who wish to continue their education, gain places in senior secondary schools. However, only students that performed very well in the BECE can choose where they go for senior secondary, with the remainder of students being allocated through the central allocation system.

Senior secondary education lasts for three years and the curriculum includes the four mandatory core subjects of English, integrated science, mathematics, and social sciences, alongside elective subjects from the following specialisation streams: General (with separate arts and science options), agriculture and environmental studies, business, vocational, and technical.

[16] Press releases, UNICEF, https://www.unicef.org/ghana/press-releases/400000-children-ghana-not-enrolled-pre-primary-education-unicef

In 2007, Ghana switched from the National Senior Secondary School Certificate Examination to the pan-regional West African Senior School Certificate Examination (WASSCE). Eligible candidates are registered to sit for the exams in May/June by the relevant school authorities. The examinations cover the four core subjects, alongside students' elective subjects.[17]

4.3 Technical & vocational education and training

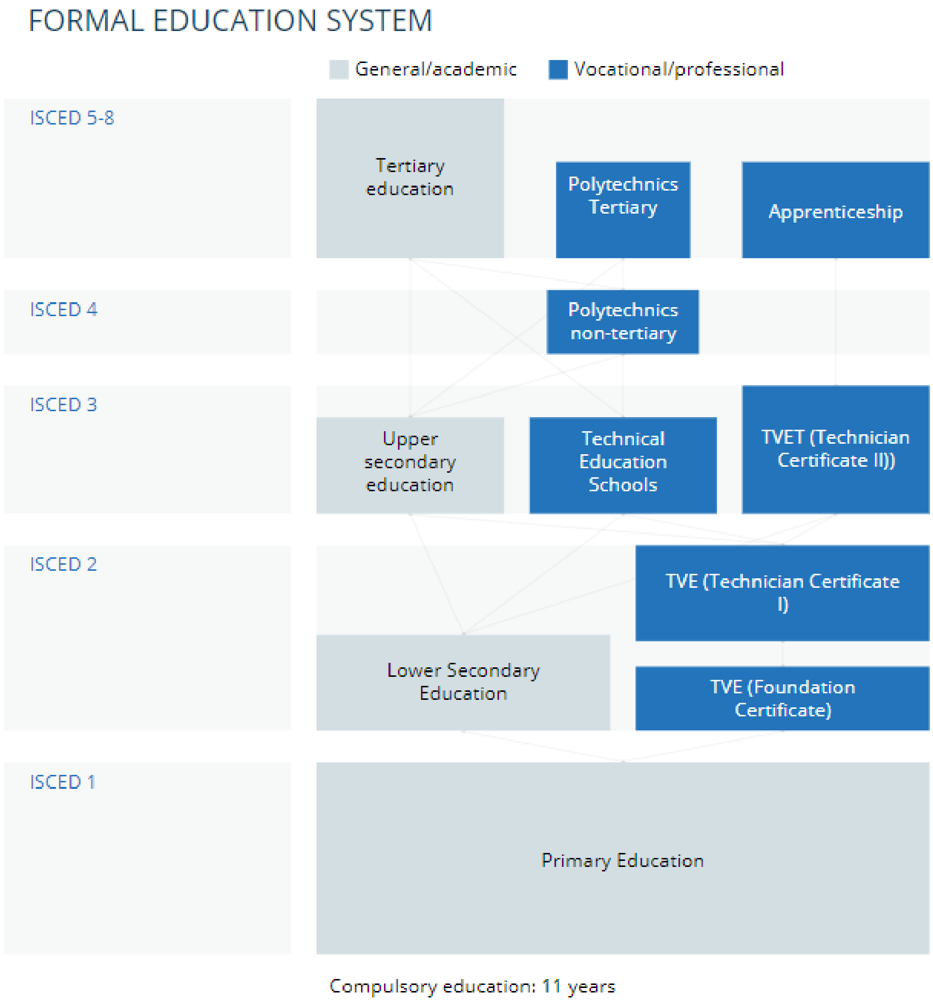
According to ESP 2018-30, TVET in Ghana is limited in scope and does not cover the diverse needs of learners or of Ghana's economy. The relevant institutions are also ill-equipped to provide an adequate education to students. Furthermore, there is a mismatch between the skills supplied in TVET institutions and demand for skills in the labour market, and there is also low industry investment and involvement in the system. In addition, only 52 per cent of TVET teaching staff possess technical qualifications, while staffing norms and standards vary substantially throughout the country. Learning outcomes are also poor, especially for students at the Technician level, with only 30 per cent of students on average passing the Technician I examinations. All of these factors have combined to contribute to the poor perception of TVET within Ghana, with only a very small share of students choosing TVET as their preferred pathway.

As of 2019, there were just under 77,000 Ghanaian students enrolled on vocational courses at the secondary level, with females making up just over one quarter of the total. Within Ghana, the MOE governs the TVET system. Other bodies involved in the governance of the TVET system include the Council for Technical and Vocational Education and Training (COTVET) and the National Vocational Training Institute (NVTI). COVTET is responsible for the coordination and supervision of the TVET system with the mandate to plan, coordinate and support all aspects of TVET at the national level. COVTET is also responsible for the quality of TVET programmes and ensures this by working with the Training Quality Assurance Committee (TQAC). Meanwhile, NVTI, which comes under the Ministry of Employment and Labour Relations, operates 34 vocational institutes dotted all over the country training the youth in 28 different skill areas.[18]

Improving the country's TVET system is an important feature of ESP 2018-30. Key objectives for the sector include improving coordination of TVET institutions, with the current fragmented structure being replaced by a system whereby all TVET providers are brought under the MOE. The TVET curriculum will also be redeveloped, with improved teacher training also a priority. Through increasing the budget allocation and increasing public–private partnerships the expectation is that TVET will become a more attractive pathway for students and will provide relevant skills for current and future workforce needs.

[17] Education in Ghana, *World Education News and Reviews*, 2019, https://wenr.wes.org/2019/04/education-in-ghana
[18] TVET Country Profile: Ghana, *UNESCO*, 2023, www.unevoc.unesco.org/home/Dynamic+TVET+Country+Profiles/country=GHA

Figure 5: TVET system structure in Ghana



Source: UNESCO

4.4 Higher education

The higher education sector in Ghana has expanded significantly in recent years, with the number of tertiary enrolments more than doubling from 286,000 in 2011 to 581,000 enrolments by 2021, according to UNESCO data. Like in other African countries, this expansion has been accompanied by a rapid growth of the private sector – the number of private HEIs increased from just two private universities in 1999 to over 80 private universities and colleges in 2019. However, the surging demand for higher education within the country makes it increasingly difficult for the Ghanaian system to effectively provide mass education while maintaining quality standards.

In response to the rapid growth of the higher education system and the increase of education providers in Ghana, the government in 1993 created the National Accreditation Board (NAB) in an effort to ensure quality. All institutions in Ghana, public or private, must be accredited by the board, which also approves the establishment of any new HEIs. New institutions must apply for an initial three-year interim permit to offer programmes under the supervision of an affiliating university and undergo annual performance reviews by the “mentoring” university. Private HEIs are only permitted to obtain chartered degree-granting status after ten years of operation as university colleges, as long as they deliver programmes of sufficient quality and have adequate facilities and teaching staff.

HEIs in Ghana tend to follow a semester system. The system comprises of two semesters, each 16-18 weeks in length, that run from January through May, and August through December. The predominant language of instruction is English. While university admissions criteria in Ghana vary somewhat by institution, the baseline admission requirements for all providers are set by the GTEC. All candidates must have a minimum grade of 6 in at least three WASSCE core subjects, as well as in three elective WASSCE subjects. Given the surging demand for higher education in Ghana, admission is highly competitive, especially at top public universities.

In addition to universities, there are various teacher training colleges, nursing colleges and university colleges that do not have standalone degree-awarding authority, but offer undergraduate programmes in affiliation with universities, which are often undergraduate programmes geared towards employment. Polytechnics, of which there is one in each of Ghana’s 16 regions, have diversified in recent years and are increasingly offering programmes similar to university programmes in disciplines like liberal arts in addition to technical programmes. In an attempt to strengthen tertiary vocational education, in 2016 the Ghanaian government elevated eight polytechnics to technical universities which can award bachelor’s and master’s degrees.[19]

[19] Education in Ghana, World education news and reviews, *https://wenr.wes.org/2019/04/education-in-ghana*

5 International Education

5.1 Student mobility

According to estimates from UNESCO, just over 20,000 students from Ghana travelled abroad to study at the higher education level in 2021, making it the third largest outbound international student market in Sub-Saharan Africa, after Nigeria (85,000) and Cameroon (30,000). Since 2008, the volume of outbound students from Ghana has increased each year, doubling from 9,000 to 20,000 over the period. Historically, the US and the UK have been the most popular study destinations for outbound international students from Ghana. Although recent data are unavailable, prior to the pandemic China was also a leading market for Ghanaian outbound students, hosting in the region of 6,500 students.[20] Meanwhile, Germany and Canada, as well as African nations including Senegal and South Africa have been popular choices for Ghanaian students over recent years.

Outbound student mobility is an established trend among Ghana's wealthiest families and demand for education abroad has grown over recent years as the economy and household wealth have developed. Additionally, Ghanaians may consider study abroad if they are unable to access public university places due to competition or if they seek a high-quality programme that is not available in Ghana, particularly at postgraduate level.

The UK's recruitment of Ghanaian international students has been on a consistent upward trajectory over recent years, growing each year since 2015/16. In the years prior, growth had been on a downward trajectory due to a combination of factors including a fiscal crisis in the Ghana economy and the change in UK post-study work visas. Growth in Ghanaian international students in the UK picked up particularly strongly in the 2021/22 academic year, to a record high of almost 4,200, with the reintroduction of the Graduate Route from summer 2021 a key driving force behind the increase.

Consistent with the recent increase in Ghanaian international student numbers, UK study visa issuance to Ghanaian nationals has grown strongly over recent years. The number of sponsored study visas issued to Ghanaian students was more than 4,900 in 2023, almost 3.5 times the pre-pandemic number, with continuous growth over the last three years. This made Ghana the UK's second largest sending source country in Africa, only behind Nigeria and suggests that the strong growth seen in Ghanaian international student numbers in the UK continued in the 2022/23 academic year. However, the very latest data appears to be more negative, with the last three months of 2023 seeing a 29 per cent drop in visa issuances compared to the same quarter of 2022.

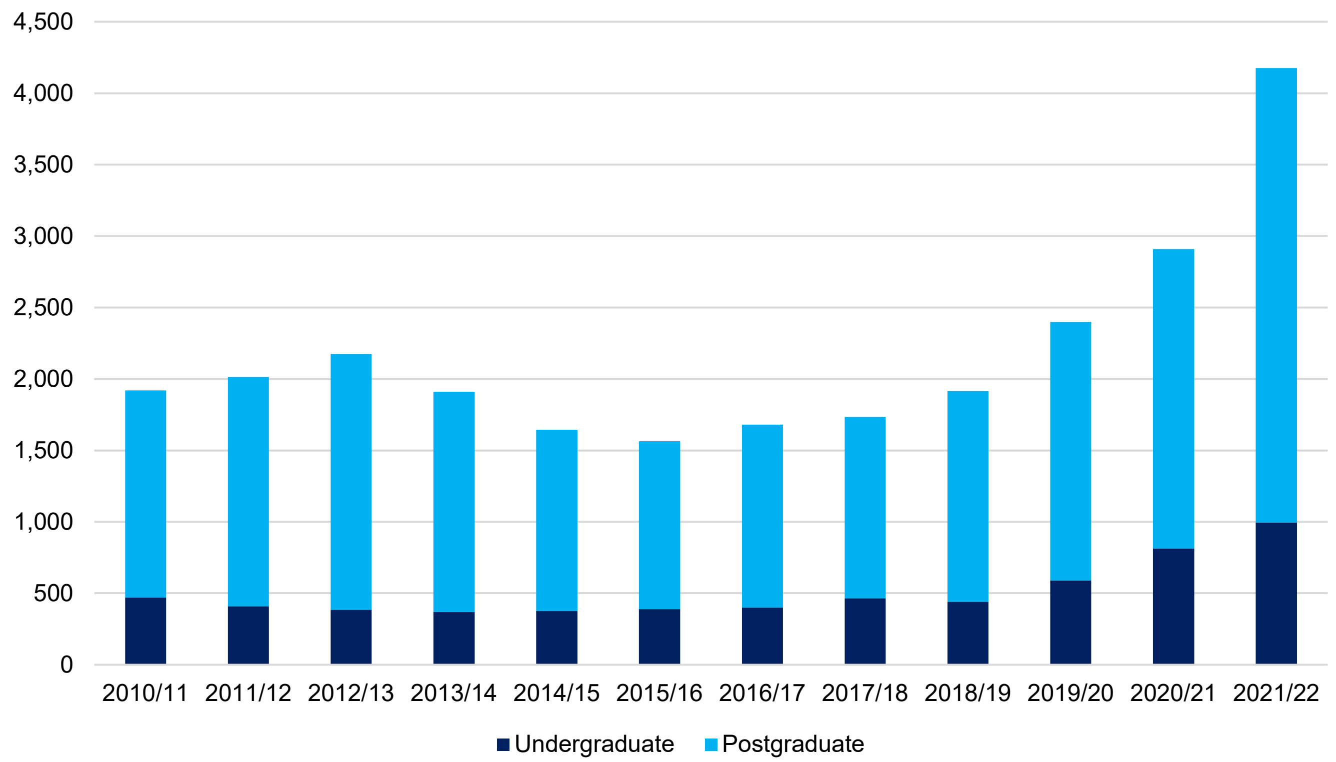
Looking forward, student mobility from Ghana is likely to be strongly affected by recent changes to the UK's visa policy surrounding dependents of taught postgraduate students, as the country's

[20] China seizes the initiative in growth of outbound students from Ghana, *Global Student Living*, 2022, www.gsl.news/2022/11/11/china-seizes-the-initiative-in-growth-of-outbound-students-from-ghana/

ratio of dependents to student visa holders was the third highest across all the UK's major sending countries in 2023.[21]

Over the last decade, Ghana has primarily been a postgraduate market for the UK, with an average of around 75 per cent of Ghanaian international student enrolments being at the postgraduate level during the period. The shortage of high-quality postgraduate courses available domestically, as well as the UK's price competitiveness at postgraduate level have been important in this context, given that master's programmes in the UK can typically be completed in one year, compared with at least two years in the US and Canada. Meanwhile the proportion of Ghanaian international students studying at Russell Group institutions, which was relatively stable in the 20-25 per cent range until 2019/20, has recently fallen sharply to 14 per cent in 2021/22, highlighting that much of the recent strong growth in Ghanaian students has come from non-Russell Group institutions.

Figure 6: Ghanaian students in HE programmes in the UK



Source: HESA

In terms of subject areas, business and management was by some distance the most popular broad subject area overall with Ghanaian students, with a total of 1,215 enrolments in 2021/22, followed by subjects allied to medicine (750), social sciences (455), engineering and technology (345) and law (335).

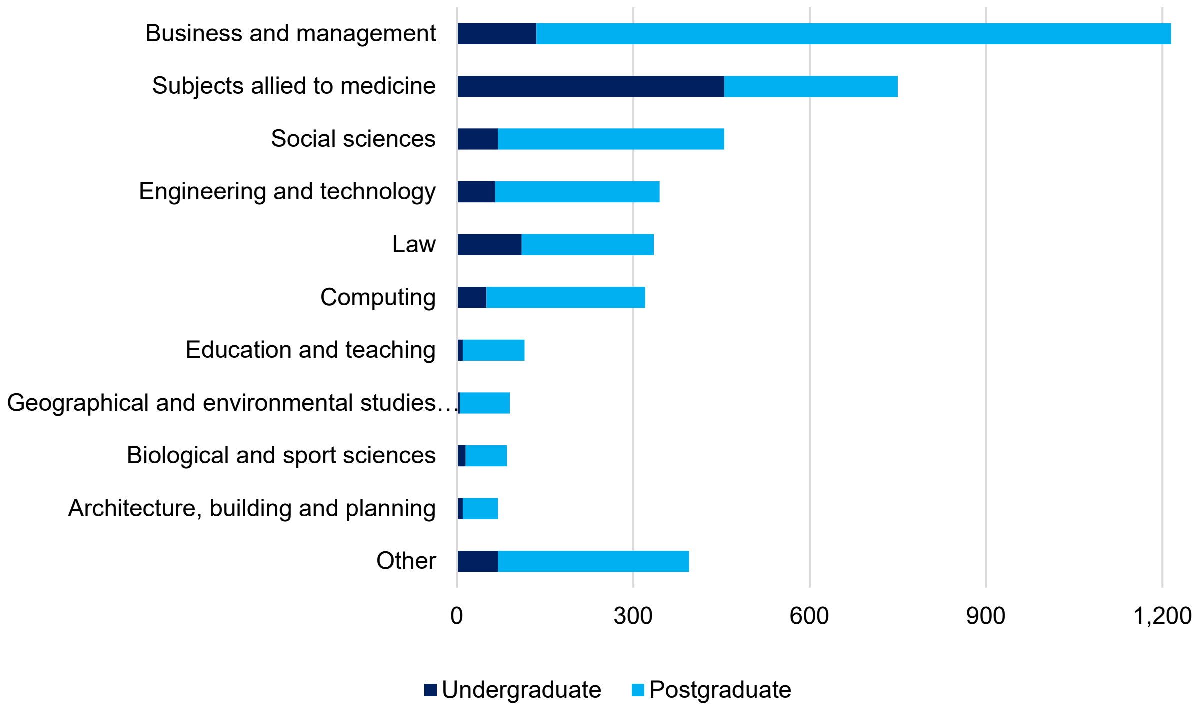
[21] Excluding countries with fewer than 1,000 students

At undergraduate level, subjects allied to medicine (455 students) is the most popular broad field of study by a large margin. This is mainly due to a large sub-degree nursing programme at one institution, which accounts for almost two thirds of this group – but even if that university is excluded, subjects allied to medicine is still ranked ahead of business management (135) and law (110) which are the only other subjects with more than 100 enrolments.

At postgraduate level, business and management (1,080) stands out as the leading subject choice, with almost three times more enrolments than the next most popular subject, social sciences (385). Looking back over the last five years, there has been little change in the leading subject choices by Ghanaian students, with the top 5 subject choices overall the same in 2021/22 as in 2016/17.

In terms of location, Scotland is the preferred region of study in the UK for students from Ghana, with almost 900 enrolments in the 2021/22 academic year, representing around one in five of the total. London was the next most popular, with 655 students, followed by the North East (400). At institution level, Ulster University (340) was most popular, followed by the University of Aberdeen (275) and Brunel University of London (260).

Figure 7: Subjects studied by Ghanaian HE students in the UK, 2021/22

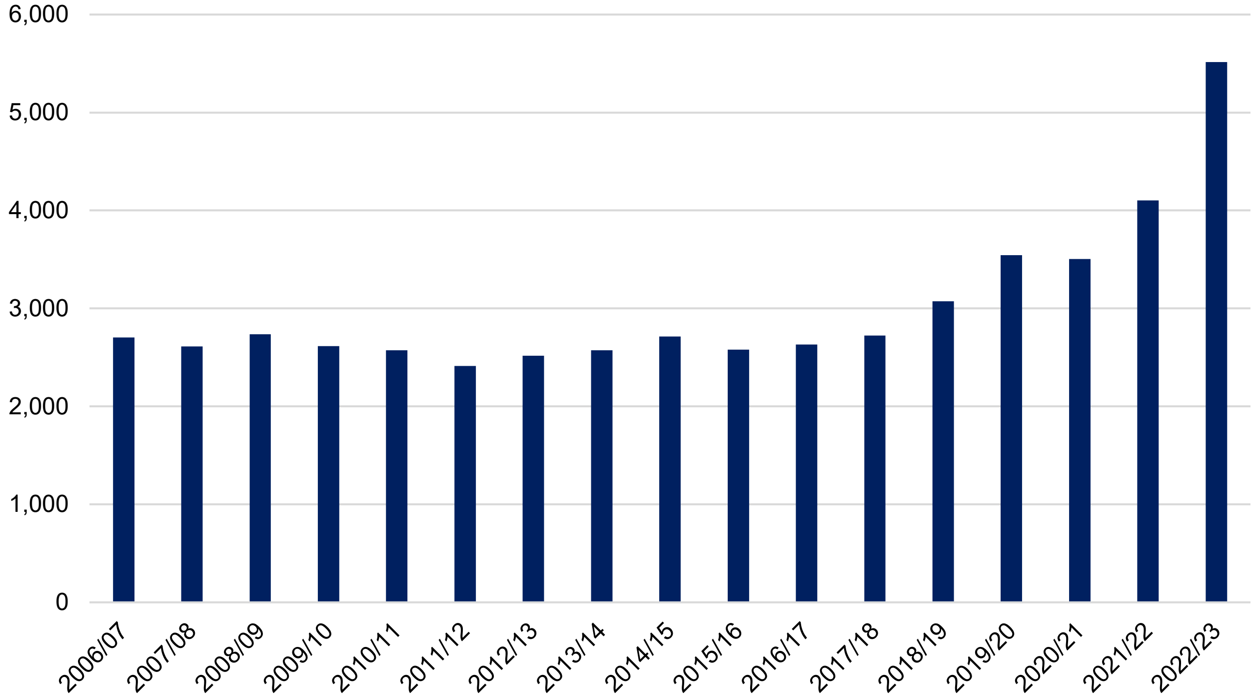


Source: HESA

Alongside the UK, the US has historically been a leading English-speaking destination for Ghanaian international students. After remaining stable at around 2,500 students for several years, the volume of Ghanaian students studying in the US has picked-up more recently, rising to just over 4,100 in the 2021/22 academic year, following a minor slowdown in 2020/21 after the onset of the Covid-19 pandemic. In 2022/23, further strong growth was recorded, with the number of students rising to just over 5,500.

Ghana remains an important African recruitment market for the US, being its second largest Sub-Saharan African source market, only behind Nigeria. Looking ahead, recent changes to US student visa requirements are likely to promote growth in Ghanaian international student flows to the US. In February 2023, the US State Department announced an expansion of the time period during which international students may apply for a student visa to study in the country. Previously, students were able to apply only 120 days before their planned programme started leaving little leeway for issues with applications. Under the revised rules, the US will accept student visa applications up to 365 days in advance.[22]

Figure 8: Ghanaian HE enrolments in the US



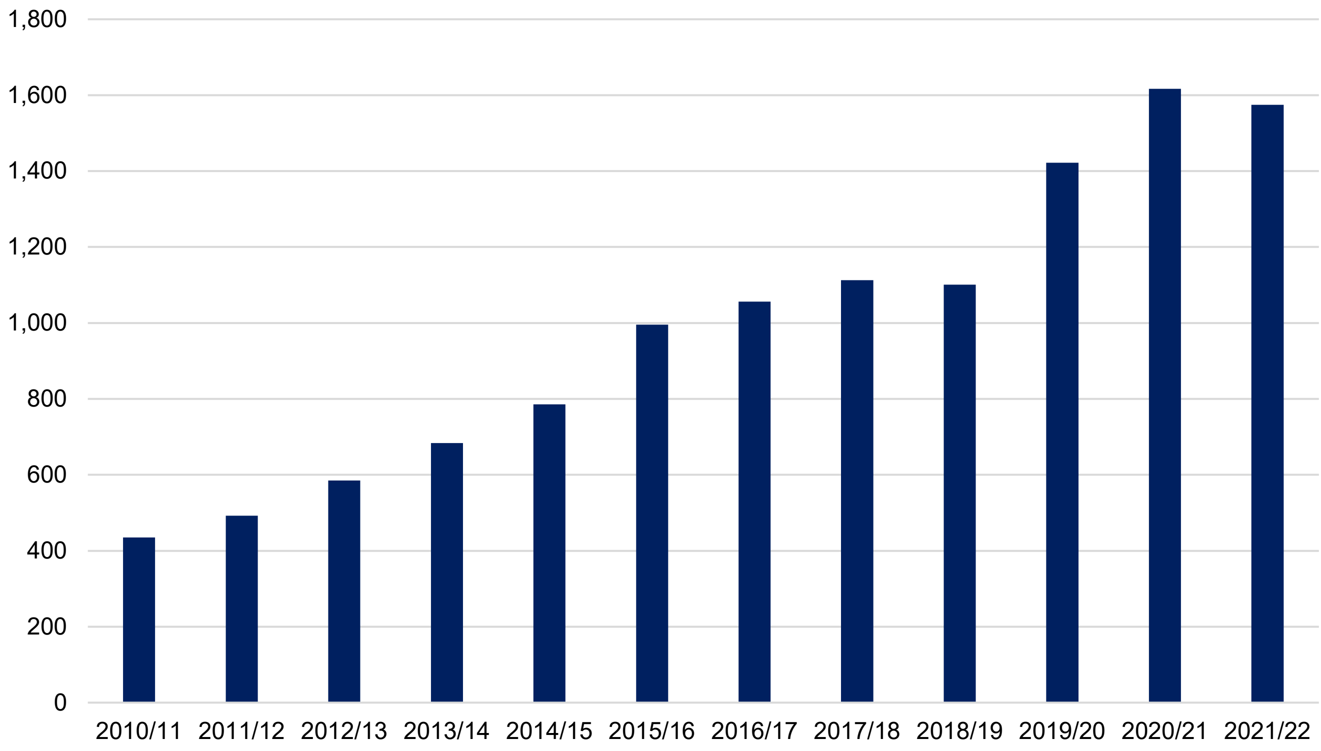
Source: IIE (Note: OPT students excluded).

Although significantly smaller than the UK and the US, Canada has seen strong and consistent growth in international student numbers from Ghana over the last decade, rising from just over 400 enrolments in 2010/11 to just over 1,600 by 2020/21, due to targeted marketing and recruitment efforts by the Canadian authorities over recent years. Student numbers fell back slightly in the 2021/22 academic year to just below 1,600 but remain close to the record high seen the previous year.

[22] US now allows student visa applications up to one year in advance, *ICEF*, 2023, www.monitor.icef.com/2023/02/us-now-allows-student-visa-applications-up-to-one-year-in-advance-of-programme-starts/#:~:text=On%2021%20February%202023%2C%20the,before%20their%20planned%20programme%20starts .

However, low visa approval rates continue to be an issue for Ghanaian students wishing to study in Canada. As of 2021, the approval rate for Ghanaian study visas stood at just 18 per cent. By comparison, the approval rate for neighboring Ivory Coast stood at 35 per cent in 2021, while the global average was 60 percent.[23] As such, there clearly remains significant unrealised demand for international study in Canada by Ghanaian students which could contribute to continued strong future growth if the visa approval rate can be raised.

Figure 9: Ghanaian HE enrolments in Canada



Source: StatCan

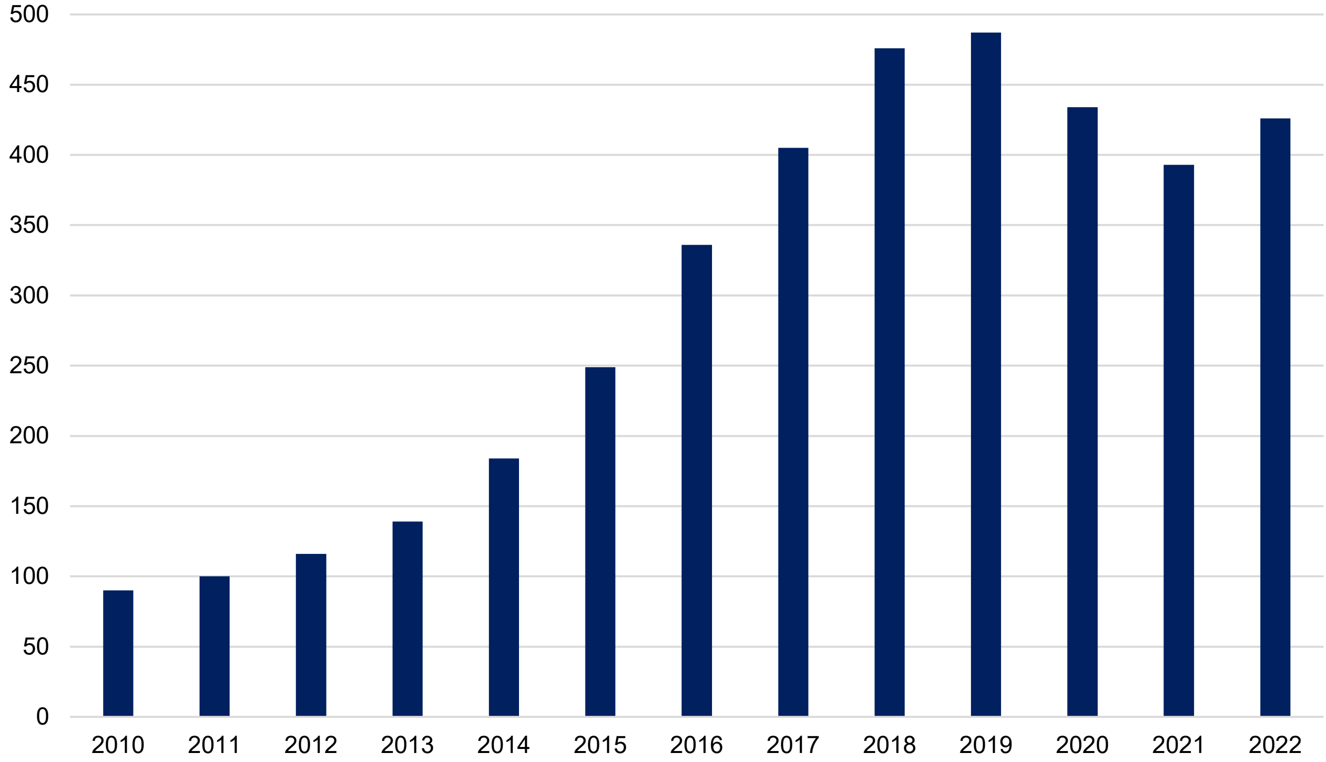
Although still a relatively small host market for Ghanaian international students, Australia has experienced very strong growth in Ghanaian inbound students over the last decade. In 2010, there were only 90 Ghanaian international students enrolled at the higher education level. However, after 9 consecutive years of growth, the number of Ghanain enrolments had increased to just below 500 in 2019, representing a five-fold increase over the decade. Contributing to this strong growth, the Australian government, through its embassy and trade agency AusTrade, has been active in promoting Australian higher education in West African markets over recent years. AusTrade has a dedicated West African office based in Accra, and the Australian government offers a range of appealing scholarships.[24]

However, after peaking at around 490 students in 2019, declines in Ghanaian international students studying in Australia were recorded in 2020 and 2021, with the volume of student

[23] Student approval rates by country of residence, *Government of Canada*, 2022, www.canada.ca/en/immigration-refugees-citizenship/corporate/transparency/committees/cimm-feb-15-17-2022/student-approval-rates.html
[24] Austrade offices, *AusTrade*, 2023, www.austrade.gov.au/international/how-austrade-can-help/offices/ghana

enrolments down to 390 by 2021, a decline of almost 20 per cent compared to the 2019 level. Much of the decline is likely to have been driven by the highly restrictive border control and international travel policies employed by the Australian government after the onset of the Covid-19 pandemic. However, in late 2021, the government temporarily extended work rights for international students and offered other incentives such as visa application fee refunds to entice international students back.[25] Student numbers saw some recovery in 2022 but are yet to return to 2019 peak levels.

Figure 10: Ghanaian HE enrolments in Australia



Source: AusTrade

From an inbound student mobility perspective, according to UNESCO, Ghana hosted just over 5,400 international students in 2022. Incoming students to Ghana predominantly originate from other African countries, including Nigeria, Cameroon, Côte d'Ivoire and Gabon. Over the last decade, there has been considerable volatility in the volume of inbound international students to Ghana. After growing consistently year-on-year between 2011 and 2015, student numbers peaked at almost 18,000 in 2015. Since then, student numbers have been on a downward trajectory, now standing at around 5,400. Contributing to this sharp decline has been a significant reduction in student numbers from Nigeria, where a challenging macroeconomic environment, combined with concerns about the quality of Ghanaian higher education institutions led to a sharp decline in the number of Nigerians studying in the country. While standards at Ghanaian public universities are acknowledged to be reasonably high, many Nigerian students reportedly chose

[25] Australia: International enrolments down 17% in 2021, *ICEF Monitor,* 2022, www.monitor.icef.com/2022/03/australia-international-enrolments-down-17-in-2021-but-visa-applications-now-trending-up/

low-quality private providers that charged high fees for non-accredited or sub-standard programmes. In some of these institutions, it is believed that Nigerian students accounted for 90 per cent of the student body.[26]

5.2 Transnational education and distance learning

According to data from HESA, there were just under 3,000 Ghanaian students enrolled on UK TNE and distance learning courses in the 2021/22 academic year, which represents a decline of around 14 per cent compared to the previous year. The decline in 2021/22 was a continuation of downward trend seen over recent years, with TNE and distance learning enrolments declining in each of the last five years, having peaked at just over 3,900 in 2016/17. Nonetheless, Ghana remains the UK's fourth largest market in Africa, behind Egypt (23,800), Nigeria (5,600) and South Africa (5,420).

Similar to the structure of international student enrolments, Ghana is primarily a postgraduate market for UK TNE and distance learning, with postgraduates accounting for around two thirds of total enrolments over the last decade. At present, the largest part of this provision (42 per cent) is via distance, flexible and distributed learning. The UK has just one branch campus in Ghana, via Lancaster University Ghana, which accounted for 395 enrolments in 2021/22. It was established in October 2013 when it received its accreditation from the National Accreditation Board in Ghana. The Accra-based branch campus, which is a collaboration between Lancaster University and Trans National Education Ghana Limited, is the only one of its kind in West Africa and is committed to producing graduates who have the skills and knowledge to meet the region's industrial, societal and governmental needs.[27]

Ghana lacks a national strategy on transnational education, meaning that partnerships largely remain the result of collaboration between individual departments and institutions. Institutions intending to establish in Ghana must be approved by the MOE and may need to be affiliated with a local institution. In a 2019 study conducted by the British Council, major reasons cited by many Ghanaian institutions which reported that they did not have or were not engaged in any form of TNE partnerships included, insufficient knowledge about TNE partnerships, inadequate infrastructure to support TNE partnerships, inhibitions from regulatory bodies and lack of knowledge about TNE partnerships.[28]

With its young and rapidly growing population, higher education demand in Ghana is set to grow strongly in the decades ahead. However, the country's higher education capacity is insufficient to meet the growing demand and online and distance learning can provide a means by which the country can meet current and future demand for higher education. However, the establishment of

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[26] Education in Ghana, *World Education News and Reviews*, 2019, www.wenr.wes.org/2019/04/education-in-ghana
[27] Lancaster University Ghana, *Lancaster University*, 2015, www.lancs.ac.uk/lancaster-ghana-2015/lancaster-university-ghana/
[28] Investigating TNE partnerships and the environment of distance learning in higher education institutions in Ghana, *British Council*, 2019, www.britishcouncil.org.gh/sites/default/files/transnational_education_partnerships_landscape_report.pdf

a clear national strategy and regulatory framework will be essential in order to facilitate future growth and participation of international universities.

6 UK Cooperation

As part of the UK government's International Education Strategy (IES), Ghana, alongside Nigeria and Kenya, was identified as a key Sub-Saharan African growth opportunity for UK HEIs. The strategy highlights these markets due to their growing economies, expanding populations and close links with the UK, with the report vowing that as these countries' education systems change and grow in the years ahead, the UK will work to ensure that it remains the partner of choice in the region. Ghana's inclusion within the UK's IES underlines the perceived strategic importance of Ghana and the wider Sub-Saharan Africa region by UK policymakers for the future growth of international education in the UK.[29]

A leading example of the cooperation between the UK and Ghana within the education sector is the ongoing Education Beyond Aid (EBA) Ghana programme, funded by the UK's Foreign, Commonwealth and Development Office. The purpose of this programme is to increase the Ghanaian MOE's self-reliance in managing the education sector and delivering quality education services to Ghana's children, including to the most vulnerable. This programme has two components, the first of which will establish and operationalise within the MOE a delivery unit (called the 'Reform Secretariat') to oversee the implementation of its ambitious education reform agenda, and the second of which will support the MOE and related agencies to effectively resource, manage and implement the Complementary Basic Education (CBE) programme to reach out-of-school girls and boys in Ghana. To date, over £4m has been spent on the programme, with another £900,000 of support planned before the end of the programme in September 2023.[30]

Furthermore, in 2021, the British Council developed and designed the Innovation for African Universities (IAU) project, to foster the culture of innovation and entrepreneurship within universities and facilitate the development of skills required to build industries, companies, products and services. The project is designed to support the development of Africa – UK university partnerships that build institutional capacity for higher education engagement in entrepreneurship and innovation ecosystems in selected African countries. The four selected Ghanaian partner universities in 2021 were the University of Ghana, the Regional Maritime University, Accra Technical University and the University of Health and Allied Sciences.[31]

Students from Ghana also benefit for a range of UK scholarship schemes, including Chevening scholarships, Commonwealth scholarships and the GREAT scholarship programme. A recent addition to the GREAT scholarship scheme is a specific scholarship for international students who want to study a master's in law, justice, or human rights. There are 20 scholarships available for students beginning a relevant masters in 2023/24 from a list of ten countries, which includes Ghana.[32]

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[29] International Education Strategy: 2021 update, *Dept. for Education*, 2021, www.assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/958990/International-Education-Strategy-_2021-Update.pdf

[30] Education Beyond Aid Ghana, *Foreign, Commonwealth and Development Office*, 2022, www.devtracker.fcdo.gov.uk/projects/GB-GOV-1-300517/summary

[31] Innovation for African Universities, *British Council*, 2021, www.britishcouncil.org/education/he-science/opportunities/innovation-african-universities

[32] GREAT Scholarships from the British Council, *Find a Masters*, 2023, www.findamasters.com/guides/great-scholarships