





Introduction

Eloy Jauregui, Chair, GWO

On behalf of the GWO membership, I am very proud to present our 2018 annual report. The numbers in these pages tell a lot of stories, many of them underlining how GWO standards have woven themselves into the fabric of the industry supply chain.

Over 74,000 people held a valid certificate at the turn of 2019, which represents 5-10% of the global wind workforce¹. This is a considerable achievement and is testament to the commitment of the wind industry's employers and primary contractors, as well as to the hundreds of training providers who have invested to develop quality training delivered to a standard that we can all recognise.

Of course, our challenge is just beginning.

The wind energy workforce is not universally trained to GWO standards and we believe that wherever possible, they should be. This is why we will increase our efforts to engage globally and collaboratively; promote the adoption of safety standards and control the enabling governance around them so we can strive towards our mission of creating an injury free working environment in wind energy.



Annual review

Jakob Lau Holst - CEO, Global Wind Organisation

The Wind Industry Database (WINDA) was launched in October 2016 and can for the first time, compare two full years of workforce training data.

Almost 300,000 training records have been uploaded to WINDA and more than half were completed in 2018, continuing an upward trend in both the numbers of people training, and how many courses each of us is taking.

As new courses are completed, expiring qualifications are refreshed. The result is a cumulative increase in the number of people who have been trained according to industry standards.

Almost 65% more people had a valid GWO record by the end of 2018 than twelve months before. There were 68 new training sites and the availability of courses is growing in step with the industry around the world to help employers and delegates find training locally.

While most delegates receive a package of GWO Basic Safety Training modules designed to meet generic needs of a typical technician on site, there is a growing portfolio of options for additional role-specific safety training. Because these are GWO standards, the training will be recorded in WINDA and recognized by the world's largest wind energy employers.

In 2018, GWO launched Advanced Rescue Training (ART) and Enhanced First Aid Training (EFA). Several training providers have already become certified to deliver ART and EFA so it will be interesting to see what volumes the standards achieve during 2019. Meanwhile, a further two standards - Blade Repair and Slinger Signaller - are scheduled in 2019.

In an ideal world, commonly recognized GWO standards will align perfectly to the requirements of all wind companies and regulators. In the real world, GWO members invest time and resources to ensure we move towards that goal. As we do so, GWO becomes increasingly relevant as the platform to create a safer and more productive workforce in the wind industry.

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Key findings

GWO training standards continue to spread across the global wind industry.

There have been substantial increases both in the numbers of people with a GWO certificate and the amount of training modules they complete.

In the six months to December 31 2018, the number of people with a valid GWO training record grew by 10.9%.

To calculate these figures, we use the unique identifier which is the WINDA ID. By analyzing the records attached to them, we can reveal that 74,432 individuals had a valid GWO training record by the end of 2018, a rise of more than 7000 people since the end of June 2018 and an annual increase of 29,118.

Number of people with a valid GWO record

	Total	% change
31.12.2017	45,314	
30.06.2018	67,224	+48.3%
31.12.2018	74,432	+10.9%

Number of certificates uploaded

	Total	% change
2017	121,744	
2018	151,075	+24.1%

Seasonal variations

In previous reports we have shown how GWO training typically follows the seasons in the Northern Hemisphere.

In 2017, the end of Q1 and beginning of Q2 was the busiest period for training across the worldwide network of training providers. This trend was repeated in 2018 as volumes peaked from the end of March and throughout April (see graphic on p5).

For Basic Safety Training, volumes are highest during the first half of the year. Basic Technical Training saw the opposite, with increased volumes in the second half, driven largely by an increase in the number of training providers certified to deliver the course.

The ratio of training taken in the two halves of 2018 almost precisely matched the previous year 56:44.



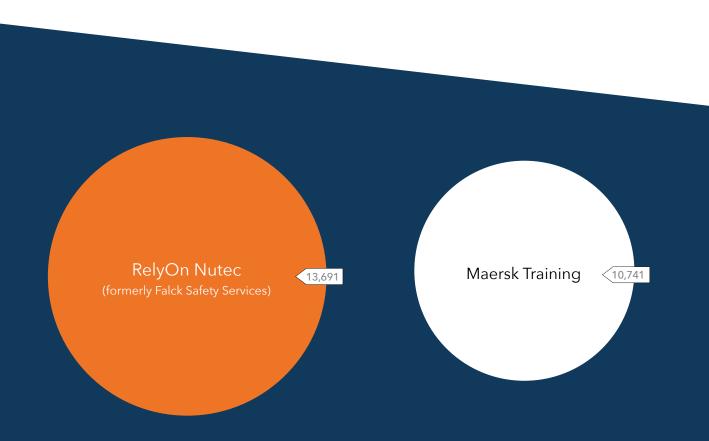
Top 10 GWO Training Providers - BST

As the number of people taking GWO courses increases, so have the volumes delivered by training providers.

The top ten GWO training providers were responsible for more than one third of all training records uploaded during 2018 (57,760). For most companies, numbers of BST modules delivered have been maintained or improved. In addition, Basic Technical Training courses have increased substantially (see page 12 for more information).

The introduction of two new standards, Advanced Rescue Training and Enhanced First Aid Training in Q4 2018 resulted in some activity late in the year which will expand during 2019 as more sites become certified to deliver them.

In most cases, the leading companies maintained their position in the top ten. There were exceptions such as 3M/Capital Safety which rose to 6th in the table. AIS Training also improved its position, joining the top three after a busy 2018. The final two places in the top ten were taken by new entrants; Turkey's Mira Endustriyel and FMTC, based in the Netherlands. A full list of training providers can be found in the data tables on pages 15-16.



Where do GWO certified technicians come from?

People from 156 different countries took a GWO course in 2018. Of the most common nationalities within the global top ten, Mexico and Turkey experienced the fastest growth. Well established regions across Europe continued to expand their GWO-trained workforce, but there is increasing evidence that standards are being adopted worldwide. This will improve the provision of local training so workers have to travel less, which in turn benefits the whole supply chain.

Training locally

When people take a GWO training course, they typically stay close to home. Amongst the top 10 countries where GWO training is taken, only 12% of delegates are from outside that country. However there are some exceptions, particularly the Netherlands, where almost one third (31%) of delegates are from another country.

More from outside top 10 countries

In 2017 79% of GWO records were uploaded for people from the top ten countries. This proportion fell to 74% in 2018 and is expected to drop further in 2019.

1/5 from outside EU

People from outside the European Union took more GWO training in 2018, with 20% of the total (H1 2018: 16%). This trend is driven by expansion in China, Taiwan, Brazil, India and Australia amongst others.



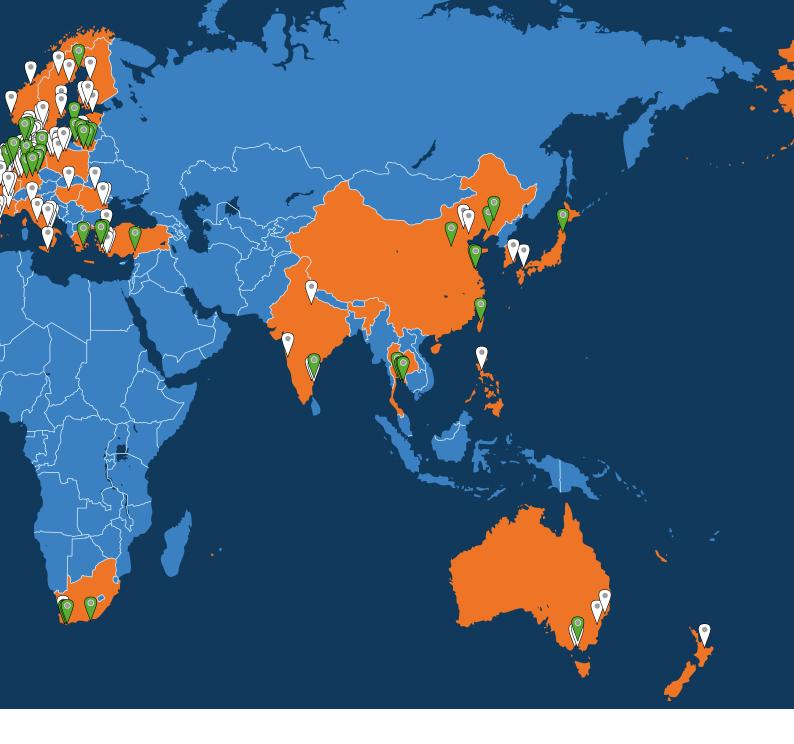


Global network continues to grow

68 new GWO training sites were opened in 2018, a 31% increase on 2017.

Of those, 29 were outside Europe. Five opened in North America, four in Central America and four in South America. In China there were five certifications in the second half of 2018 alone, three each in Turkey and Thailand and two in South Africa.

The most active countries in Europe were Spain, the United Kingdom and Germany. Lithuania, with its proximity to installations on the Baltic Sea also saw three new sites, the Netherlands and Portugal, two each.



Global wind energy trends will continue to influence the spread of GWO standards. In the USA, there was a total project pipeline of 25,434 MW of offshore wind energy as of June 2018². This pipeline includes 3,892 MW of project-specific capacity and 21,542 MW of undeveloped lease area potential capacity.

To support this potential, training institutions are preparing a number of GWO sites on the Eastern Seaboard of the US and we expect increasing capacity to develop during 2019 and 2020.

China's position as global leader in both on and offshore has coincided with a significant shift towards GWO standards as the benchmark for safety training. We expect a continuation of this trend and substantial volumes of delegates to pass through the centres which opened in 2018.

Module focus - Basic Safety Training

The numbers of people trained to the BST standard rose more than 13% in 2018.

People are also taking more of the BST modules, receiving proportionally more records at an average number of 3.12 courses taken per delegate. This increase means the total number of BST records in 2018 rose 17.5%.

The proportion increased for a variety of reasons, in particular owing to the number of delegates completing Sea Survival training. 27% took this course in 2018, with almost 4000 more records uploaded than in 2017.

The most common module remains Working at Height which was taken by 85% of people in 2018. The trio of First Aid, Fire Awareness and Manual Handling were completed by 65% of delegates.

Number of delegates trained

	Total	% change
2017	41,438	
2018	47,170	+13.8%

Number of BST records uploaded to WINDA

	Total	% change	
2017	125,330		
2017	147,334	+17.5%	

Which training do technicians take the most?

Working at Height	85 %	<u>፟ጜ፞ጜጜጜጜጜጜጜጜ</u>
Fire Awareness, First Aid and Manual Handling	61%	<u>፟፟፟ጟጟጟጟጟጟጟጟጟ</u>
Sea Survival training	27%	<u>*</u> *********

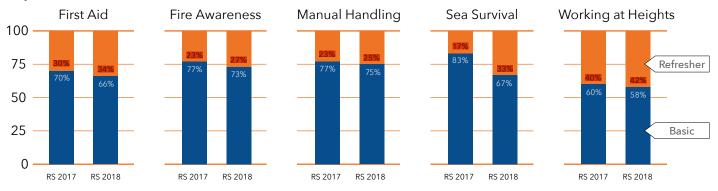
BST refreshers approach 1/3

A steady rise in the number of refresher courses year on year was expected. More people are taking main course BST modules every year, and these require a refresher training within 24 months.

In 2018, 48,190 (32%) BST refresher records were uploaded to WINDA, an increase from 36,244 (27%) in 2017.

2019 will be a significant year in relation to this ratio. WINDA launched in late 2016 giving only two months of data. 2017's main course records will expire this year, meaning an analysis of expired records against refresher training will provide more clarity as to how workers are maintaining their skills in the wind industry.

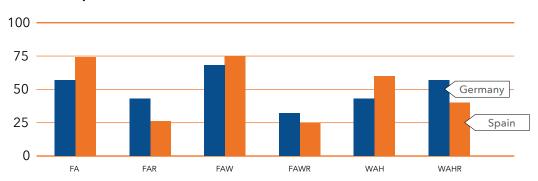
Proportion of main courses taken vs refresher courses



12 vs 24 month refresher

In Germany, First Aid and Working at Heights training must be refreshed every year. The result is refresher training often outnumbers main courses, such as WAH/WAHR. The graph below shows how two comparable markets, Germany and Spain, differ as a result. When both countries accept the standard as it is written, as with Fire Awareness (FAW/ FAWR), the main/refresher ratio is similar. When annual refreshers are required, the ratio is significantly different.

Refresher comparison



Basic Technical Training

The three BTT modules (electrical, mechanical, hydraulics) have been trained 'from scratch' on an increasing basis during 2018.

A rapidly expanding group of training providers (see below opposite) have become certified to deliver BTT and almost 1500 technicians with no existing comparable training had completed the three-day course by 31.12.2018. The result is an expanding workforce with a basic industry standard technical qualification that can be recognized by employers worldwide.

In this annual report, we have chosen to exclude records from those technicians who have received merit against their previous training. This process is ongoing and delivered up to 8000 new BTT certificates in the first half of 2018 alone (see H1 2018 report for more details).

BTT Records uploaded to WINDA (excl Merit)

	Iotai	% cnange
2017	753	
2018	3578	+475%

BTT - Basic Technical Training (excl Merit)



Top 10 GWO training providers - BTT

Training providers have shown an increasing commitment to the BTT standard in 2018, with 43 becoming certified to deliver the modules.

While most of the training centres are in Europe, the modules are also now available in South Africa, North America, China, Taiwan and Australia.

GWO will launch a further module, Installation, to the portfolio in 2019.

The graphic represents each training provider's uploads of BTT records to WINDA (excluding merit records) during 2018.



Data Tables: GWO certificates (all modules)

	2016	2017	2018
Australia	10	679	1,717
Canberra Institute of Technology		21	195
Fire and Safety Australia		302	807
Thomson Bridge Pty Ltd Total Height Safety Pty Ltd	10	159 87	463 74
Wright Training Pty Ltd	10	110	178
Belgium	335	2,648	3,351
Industrial Safety & Emergency Consult (ISEC) BVBA	209	1,340	1,331
RelyOn Nutec Belgium	126	1,308	2,020
Brazil		214	2,323
Maersk Training Brasil Treinamentos Maritimos LTDA			108
Pro Altitude		214	1,963
Storz Servicos Techicos Ltda Canada	67	681	252 404
TEAM-1 Academy Inc.	67	681	404
Chile		190	352
Grupo Salvacon Spa		55	36
Ingeteam SpA		135	222
Training Team Rescue			94
China		666	1,206
Avanti wind systems (Shanghai)		413 218	236 834
Gamesa Wind (Tianjin) Co., Ltd. Goldwind offshore wind training center		218	21
Vestas		35	115
Costa Rica	28	553	283
Formacion de Rescate Profesional (INERCO)	28	553	5
Total Health Safety Enviroment SL - Costa Rica			278
Denmark	2,344	14,726	14,700
Amu-Vest	9	13	7
Avanti Wind Systems A/S	9	72	54
Global Wind Academy	0.7	F20	51
International Wind Academy Lolland A/S	97 1,012	538 6,331	488 5,387
Maersk Training A/S Martec	1,012	35	641
Martec - Maritime and Polytechnic College	49	598	2
Nordjyllands Beredskab Uddannelsescenter		179	97
RelyOn Nutec	416	2,902	4,198
RESC Rednings og Sikkerhedscenter	11	394	226
Rescue Center Denmark	260	1,334	1,435
Siemens Gamesa Renewable Energy A/S	476	2,330	2,102
Uddannelsescenter Holstebro Estonia		/ 0	12
Reval Marine and Offshore Training		68	245 245
Finland	50	273	395
Wind Controller		14	91
Wind Controller Oy	50	259	304
France	115	661	1,106
Accsys	_	89	132
Alpic	5	40	66
Apave RZEE Acadomy GmbH	80	205	2 166
BZEE Academy GmbH CEPS	30	74	192
Institut de formation Socotec		199	205
Justy Ingénierie Énergies		54	343
Germany	2,227	18,687	21,453
3M - Capital Safety Training Center - Fall Protection	278	2,595	4,284
3M - Capital Safety - Mobile Unit			20
Aeroconcept			92
Alpintec GmbH	47	509	662
BZEE Academy GmbH Deutsche WindGuard Offshore GmbH	244	34 1,652	14 1,493
Deutsche Windduard Offshore Gribbi Deutsche Windtechnik Rotor und Turm GmbH & Co.	35	845	1,024
GE Wind Education Center	- 55	3 13	2
German Wind Academy GmbH		225	1,010
Hailo Wind Systems GmbH & Co KG	76	314	200
Heinemann Projektberatung	134	1,857	1,329
ISC Training & Assembly GmbH	126	1,630	1,603
Kletter-Spezial-Einheit	1	1	4.654
O.S.T. Cuxhaven GmbH & Co.KG	118	729	1,033
OffTEC Base GmbH & Co. KG PSA Sicherheitstechnik GmbH & Co KG	45	1,019	1,319 13
PSA Sicherheitstechnik GmbH & Co KG PSA Zentrale		2	179
. o Londido	_		17.7

	2016	2017	2018
RelyOn Nutec	836	5,056	5,111
RescOff GmbH	101	788	742
Rope Access Solutions GmBH	1	33	20
Seilpartner GmbH	1	69	355
Siemens AG	51	364	275
Skylotec - Germany	98	498	343
Triowind GmbH	4	24	41
Windhunter Academy GmbH	31 29	443	289 475
ACTIVE POINT SA	27	440	82
GEP	29	440	393
Hungary	37	457	378
Siemens Gamesa Renewable Energy Kft.	37	457	378
India	69	2,092	3,129
Eduforce			306
Karam Training & Consultancy		168	472
Maersk Training India Pvt. Ltd.		71	537 513
Technical and Safety Training Centre Usha Fire Safety Equipment Pvt Ltd.	69	1,853	1,301
Ireland	171	1,078	793
Access Rescue Consulting at Height Ltd	103	753	455
H&MV Engineering Ltd			28
Renewables Academy	68	325	310
Italy	147	898	1,714
ASL Azienda Sicurezza Lavoro	58	181	174
Form UP S.r.l.	14	182	141
General Electric International Inc. Branch -IT IVPC Service srl	12	174	21 361
O.T.I Service Srl	63	224	345
Padrone s.r.l.	00	50	355
Parco Della Vita Srl		87	317
Japan	4	66	112
EOS Engineering & Service Co., Ltd.			31
Nippon Survival Training Center	4	66	81
		84	301
K2 Specialist Services Pto Ltd			
K2 Specialist Services Pte Ltd		84	301
<u> </u>	23 23		
K2 Specialist Services Pte Ltd Latvia	23	84 1,269	301 1,627
K2 Specialist Services Pte Ltd Latvia Baltic Offshore Training Centre SIA	23 23	84 1,269 851 345 73	301 1,627 894 530 203
K2 Specialist Services Pte Ltd Latvia Baltic Offshore Training Centre SIA IQTC Management Novikontas Maritime College Lithuania	23	84 1,269 851 345	301 1,627 894 530 203 1,661
K2 Specialist Services Pte Ltd Latvia Baltic Offshore Training Centre SIA IQTC Management Novikontas Maritime College Lithuania Baltic Offshore Training Centre UAB	23 23	84 1,269 851 345 73 711	301 1,627 894 530 203 1,661 301
K2 Specialist Services Pte Ltd Latvia Baltic Offshore Training Centre SIA IQTC Management Novikontas Maritime College Lithuania Baltic Offshore Training Centre UAB MB Globalūs mokymai	23 23 23	84 1,269 851 345 73 711	301 1,627 894 530 203 1,661 301 967
K2 Specialist Services Pte Ltd Latvia Baltic Offshore Training Centre SIA IQTC Management Novikontas Maritime College Lithuania Baltic Offshore Training Centre UAB MB Globalūs mokymai UAB Gridins Enterprise LT	23 23	84 1,269 851 345 73 711	301 1,627 894 530 203 1,661 301 967 112
K2 Specialist Services Pte Ltd Latvia Baltic Offshore Training Centre SIA IQTC Management Novikontas Maritime College Lithuania Baltic Offshore Training Centre UAB MB Globalūs mokymai UAB Gridins Enterprise LT Vinda LT	23 23 23	84 1,269 851 345 73 711 72 639	301 1,627 894 530 203 1,661 301 967 112 281
K2 Specialist Services Pte Ltd Latvia Baltic Offshore Training Centre SIA IQTC Management Novikontas Maritime College Lithuania Baltic Offshore Training Centre UAB MB Globalūs mokymai UAB Gridins Enterprise LT	23 23 23	84 1,269 851 345 73 711	301 1,627 894 530 203 1,661 301 967 112
K2 Specialist Services Pte Ltd Latvia Baltic Offshore Training Centre SIA IQTC Management Novikontas Maritime College Lithuania Baltic Offshore Training Centre UAB MB Globalūs mokymai UAB Gridins Enterprise LT Vinda LT Mexico	23 23 23	84 1,269 851 345 73 711 72 639	301 1,627 894 530 203 1,661 301 967 112 281 5,355
K2 Specialist Services Pte Ltd Latvia Baltic Offshore Training Centre SIA IQTC Management Novikontas Maritime College Lithuania Baltic Offshore Training Centre UAB MB Globalūs mokymai UAB Gridins Enterprise LT Vinda LT Mexico Buzos Inspectores Asociados S.A. de C.V. Camara Decimavilla Mexico SA de CV Ingeteam SA de CV	23 23 23	84 1,269 851 345 73 711 72 639	301 1,627 894 530 203 1,661 301 967 112 281 5,355 692 768 1,338
K2 Specialist Services Pte Ltd Latvia Baltic Offshore Training Centre SIA IQTC Management Novikontas Maritime College Lithuania Baltic Offshore Training Centre UAB MB Globalūs mokymai UAB Gridins Enterprise LT Vinda LT Mexico Buzos Inspectores Asociados S.A. de C.V. Camara Decimavilla Mexico SA de CV Ingeteam SA de CV Operadora Acceso Vertical de México SA de CV	23 23 23 23 23	84 1,269 851 345 73 711 72 639 2,698	301 1,627 894 530 203 1,661 301 967 112 281 5,355 692 768 1,338 403
K2 Specialist Services Pte Ltd Latvia Baltic Offshore Training Centre SIA IQTC Management Novikontas Maritime College Lithuania Baltic Offshore Training Centre UAB MB Globalūs mokymai UAB Gridins Enterprise LT Vinda LT Mexico Buzos Inspectores Asociados S.A. de C.V. Camara Decimavilla Mexico SA de CV Ingeteam SA de CV Operadora Acceso Vertical de México SA de CV Renewable Energy Training Mexico S. DE R.L.DE C.V	23 23 23 23 148	84 1,269 851 345 73 711 72 639 2,698 199 770 20	301 1,627 894 530 203 1,661 301 967 112 281 5,355 692 768 1,338 403 23
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Previnsa-Foractiva - Mobile Unit 377 Previnsa-Foractiva - Valencia - Confrentes 8 Seguridad Gallega Nosa Terra S.A. (SEGANOSA) 21 477 359 Servigasa Special Jobs SL 10 273 48 SGS Española S.A.U 56 607 113 SGS Española S.A.U 9 233 Siemens Gamesa Innovation & Technology SLU 23 132 237 Soluciones y Desarrollos de Ingeniería y Servicios 18 18 227 1,824 TGM Formacion-Transgruma 36 86 7 1,824 TGM Formacion-Transgruma 145 1,328 925 Total Health Safety Enviroment SL 326 326 Trainek - Grupo Lider System 4 295 849 Training Team Rescue S.L. 77 481 405 Trebikal, S.L. 48 48 Verticalia Serv. de Formacion y Consultoria S.L. 146 13 15 Vertisub Seguridad SL 90 15 16 17	Omnibus Lucus Augusti S.L.U.	22		
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Total Health Safety Enviroment SL 326 Trainek - Grupo Lider System 4 295 849 Training Team Rescue S.L. 77 481 405 Trebikal, S.L. 48 48 Verticalia Serv. de Formacion y Consultoria S.L. 146 13 15 Vertisub Seguridad SL 90 90	· · · · · · · · · · · · · · · · · · ·	4.45		86
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Training Team Rescue S.L. 77 481 405 Trebikal, S.L. 48 Verticalia Serv. de Formacion y Consultoria S.L. 146 13 15 Vertisub Seguridad SL 90	·	1	205	
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Verticalia Serv. de Formacion y Consultoria S.L. 146 13 15 Vertisub Seguridad SL 90	*	.,	.51	48
	·	146	13	15
Ynfiniti Enginieering Services S.L., Spain 90 170 304				
70 1/7 374	Ynfiniti Enginieering Services S.L Spain	90	179	394

Sweden Sweden	2016 411	2,300	2018 2,774
Aptum Fallskydd AB	28	83	2,774
C2 Vertical Safety AB	63	257	181
Cresto AB	83	706	977
Klätterteknik AB		16	80
NUAB	407	705	71
Rope Access Sverige AB	197	795	909
Skylotec - Sweden V.Pro AB	30 9	330 113	246 290
VIND Hjalmar Strömerskolan	1	113	270
Taiwan, Province of China[a]			18
Taiwan International Windpower Training Cor. Ltd.			18
Thailand Pagen Inspection convices			340 90
Dacon Inspection services Pattaya International Safety Training Center Co., Ltd.			250
Turkey	367	2,083	3,830
Avrasya Rüzgar Teknoloji Mühendislik Daniş. Ürt.	9	334	344
Ekstrem İşler		104	359
ERA Iple Erişim Eğitim Danışmanlık Organizasyon	70	226	331
Kaya Training Miss Endustrial Egitim Danismanlik Organizasyan	73 256	136	126 2,347
Mira Endustriyel Egitim Danismanlik Organizasyon More Enerji San ve Tic Ltd Şti	250	1,210	159
Rüzgar Akademi			164
Triowind International GmbH	29	73	
United Kingdom	4,134	28,338	30,573
3sun Academy	125	1,240	482
Access Rescue Consulting at Height Ltd	168	1,007	1,337
Advanced Industrial Solutions Ainscough Crane Hire Ltd.	731 154	5,306 352	5,972 208
Arco Professional Safety Services	4	29	200
Belay Rope Access Ltd.	107	950	948
Capital Safety Group (Northern Europe) Ltd	195	802	800
Checkmate Lifting & Safety Ltd	175	592	438
Clyde Training Solutions	202	2 00 4	232
Complete Training Solutions CWind Training	303 138	3,804 1,090	3,731 746
Fleetwood Offshore Survival Centre	81	626	451
HFR Solutions CIC	43	344	446
HTL Group Ltd		6	15
Humberside Offshore Training Association Ltd	16	288	606
Maersk Training	88	977	1,779
Maersk Training Newcastle Limited Mistras Group Ltd	695 1	3,820 92	2,930 89
MRS Training and Rescue Ltd	27	253	222
Offshore Painting Services Ltd	2	288	1,151
Petans		35	674
Petrofac Facilities Management	1	30	1
Prontoport Ltd	122	354	445
RelyOn Nutec Renewable Strategy Ltd	88	1,260	1,318 21
Rig Systems Limited			29
Safer at Work Limited	13	95	168
Safety Technology Ltd	8	191	80
Safety Technology Ltd - UK - Raglan	93	351	547
Siemens Gamesa Renewable Energy Limited	287	491	776
Taskmasters (UK) Limited	302	12 1,928	189 2,005
The heightec Group Limited The TTE Technical Training Group	302	1,720	2,003
Windhoist Ltd.	167	1,725	1,704
United States of America	434	4,758	3,748
Avanti Wind Systems Inc.		48	48
ENSA North America Inc.	53	1,084	357
High Plains Technology Center		678	814
Safety Technology - USA Safety Technology USA		115	686 61
Siemens Orlando Wind Service Training Center	381	2,833	1,782
Uruguay	35	662	1,466
Bonelco S.A.	35	650	909
VG formación		12	305
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