



WINDA report Q1 2017

GW  WINDA



WINDA Statistics report Q1, 2017

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LAYOUT: Koefoed/Ægir
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INTRODUCTION

Welcome to the first WINDA report on training statistics retrieved from the WINDA database.

In less than 6 months, more than 30,000 users have already created a profile in WINDA, and received more than 50,000 modules of training from the 192 GWO certified Training Providers worldwide.

The intention behind this report is to contribute to increased transparency on safety training. How many technicians have received GWO standard training? Where do the technicians come from? Where are they trained? What is the market size for the different GWO training modules? What is the average number of trainings on an average training site? Are there seasonal fluctuations?

This WINDA report is the first. We will regularly issue a WINDA report on GWO training. Over time, we will be able to provide more and more detail. The WINDA report is by design limited to GWO training. This version is limited to less than 6 months of records uploaded to the WINDA database. Of course, all data is anonymized. Those are the boundaries. Hence, the report does not pretend to give a complete and full picture of safety training in the wind industry, and any attempt at deep market analysis is still just educated guesswork.

Even so, the report provides interesting statistical insights about the use and acceptance of GWO training. For instance, assume an average training module is 1 day and avoids 1 duplicate training annually. The data in this report support a conclusion, that GWO as industrial best practice has delivered efficiencies in the order of more than 50,000 additional technician workdays and an equivalent saving on avoided training days. Not to mention savings on verification of training. We too contribute to a lower cost of wind energy.

I welcome and encourage your feedback on this first report and hope to receive advice from you on how we may develop the WINDA report in the future at info@globalwindsafety.org.



Please enjoy.

A handwritten signature in blue ink, reading "Jakob Lau Holst". The signature is fluid and cursive.

Jakob Lau Holst
CEO Global Wind Organisation

BY THE NUMBERS

While 192 training Providers have been certified, or are in the process of being certified, 169 Training Provider training sites were registered end of Q1, 2017. Of these sites, 166 have uploaded training records to WINDA.

The numbers cover training in the Basic Safety Training Standard while the numbers for the Basic Technical Training Standard (previously the Basic Maintenance Training standard) are shown separately.

In order to make a comparison of the numbers in the report, a Top 10 of the largest Training Providers measured on number of records added to WINDA has been compiled and is compared with the remaining population.

Top 10 covers Training Provider companies operating multiple sites, hence the Top 10 group is composed of 23 individual training sites while the "Others" group counts 146 individual training sites.

Covering the entire period from the launch of WINDA on October 17, 2016 to March 31, 2017 compared to Q1, 2017, the following totals apply for this report.

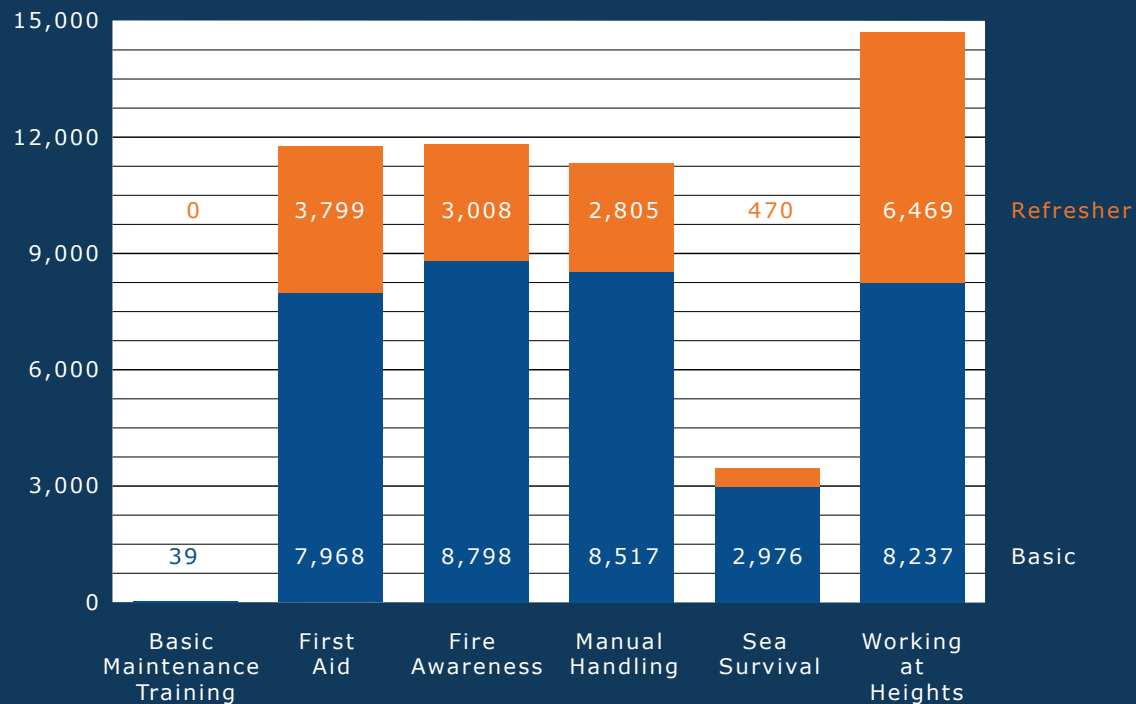
The numbers from WINDA show that almost 25% of all training sites have more than 100 GWO certified trainings per month in the first quarter of 2017. The Top 10 largest Training Providers carry out significantly more trainings than those in the "Others" group, however, it is worth noting again that the Top 10 consists of 23 training sites.

	TOTAL	TOP 10	OTHERS
BST + BSTR Training records added to WINDA October-March	53,086	23,744	29,342
BST + BSTR Training records added to WINDA Q1, 2017	37,791	16,587	21,204
Basic Technical Training records (Based on 7 certified Training Providers)	OCT.-MAR. 39	Q1 19	
	TOTAL	TOP 10	OTHERS
Average number of trainings per training site Q1	224	721	145
Average number of trainings per training site October-March	314	1032	201
Number of training sites with 100+ trainings per month Q1	40		
Number of training sites with 100+ trainings October-March	31		

The number of training sites with more than 100 trainings per month have increased from 31 covering the total period to 40 sites for Q1. The reason for the increase could be due to seasonal fluctuations or an initial slower adoption of WINDA which is also shown in the graph over seasonal fluctuations on page 7.

NUMBERS BY TRAINING MODULE

BETWEEN OCTOBER 17 AND MARCH 31



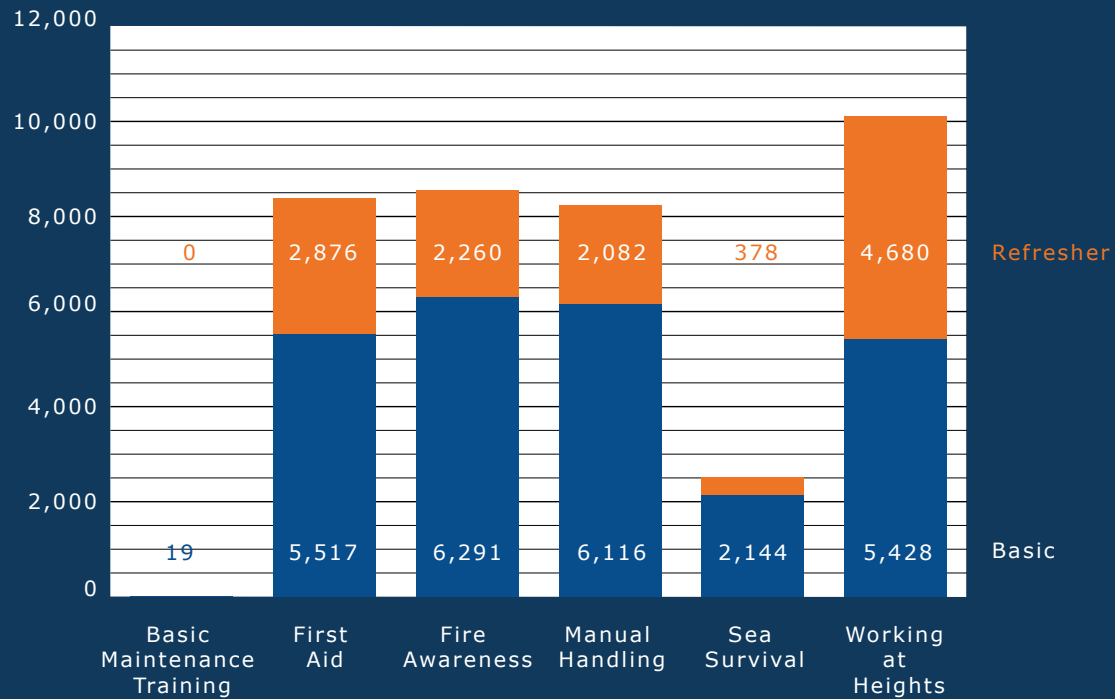
The below numbers are totals from the launch of WINDA and to the end of Q1 divided between basic modules and refresher modules.

There are no large fluctuations in the total number of modules except from Sea Survival and the Basic Technical Training (BTT/BMT). This could indicate that Delegates choose to take all four general modules in the Basic Safety Training standard while fewer choose to also take the offshore Sea Survival module.

The numbers reveal that the most popular module is the basic Fire Awareness module, but taking both the basic and the refresher modules into account then Working at Heights is the most popular module with the largest number of combined training records in WINDA.

NUMBERS BY TRAINING MODULE

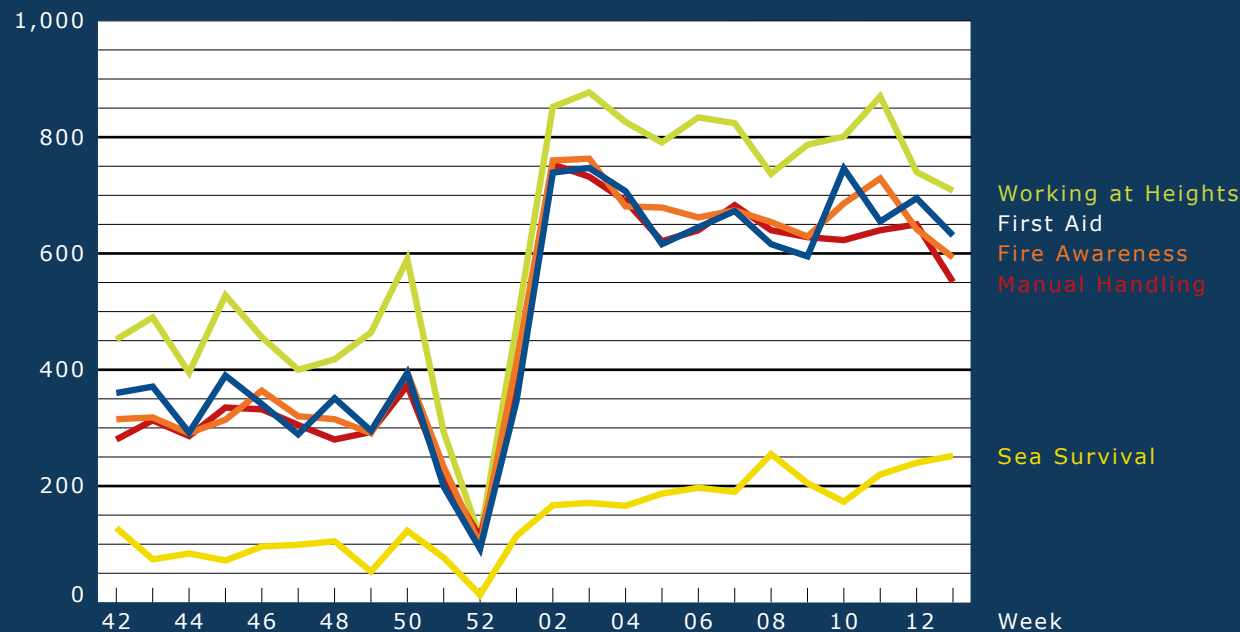
Q1, 2017



The below numbers are from Q1, 2017 and are divided between basic modules and refresher modules.

The number show the same trend as those covering October to the end of Q1 as there are no large fluctuations in the total number of modules, except for Sea Survival and the Basic Technical Training (BTT/BMT).

SEASONAL FLUCTUATIONS



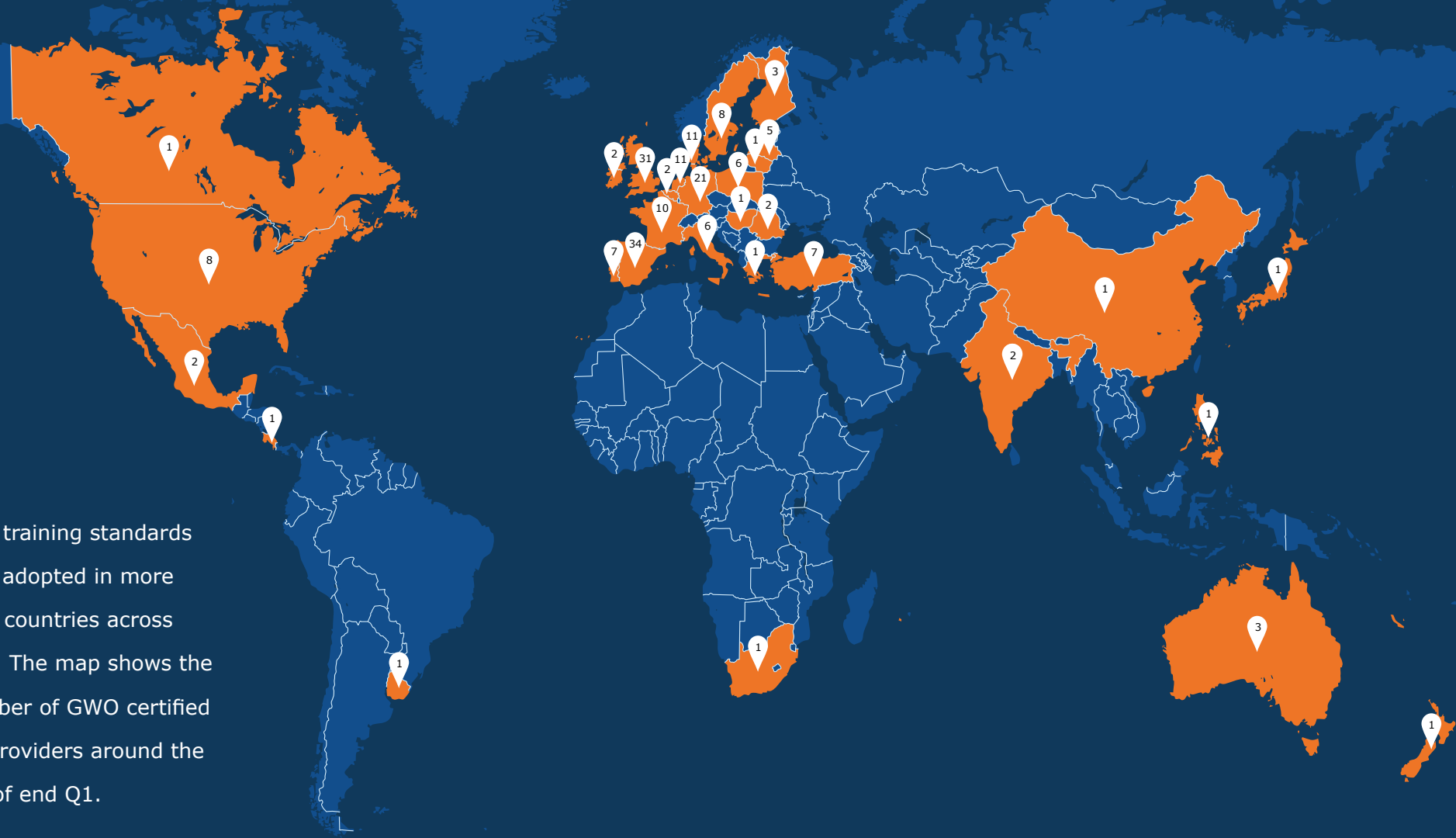
The seasonal fluctuations chart covers from the launch of WINDA and up to end Q1 in this report. It may seem to make only little sense to focus on seasonal fluctuations in a span of less than 6 months. However, as this chart is updated in future reports, the data will become more interesting.

The numbers are total numbers of basic and refresher courses for the Basic Safety Training while the Basic Technical Training is not included as the standard has not yet been fully implemented.

The numbers show the same trend as the previous graphs; the Working at Heights modules are the most popular. The large drop in week 52 is due to the holiday season. The Sea Survival module appears to be gaining traction during Q1. The overall growth in training records following the holiday season in week 52 could be ascribed to seasonal fluctuation but could also indicate a slower adoption speed of WINDA following the initial release.

WORLD MAP OF TRAINING PROVIDERS

The GWO training standards are being adopted in more and more countries across the globe. The map shows the total number of GWO certified Training Providers around the world as of end Q1.



TOP 10 COUNTRIES

MEASURED ON NUMBER OF TRAINING RECORDS

1	United Kingdom	24.2%
2	Spain	16.7%
3	Germany	15.8%
4	Denmark	13.2%
5	Poland	6.2%
6	Netherlands	4.7%
7	Portugal	3.3%
8	USA	2.3%
9	Belgium	2.0%
10	Sweden	1.8%
	Others	9.8%

The ten largest countries measured on the number of uploaded training records from 17 October to 31 March are shown in the table to the left.

The top 5 countries alone account for more than 75% of all trained individuals in the period and all 5 are located in Europe.

It is worth noting that an increasing amount of Training Providers are becoming GWO certified in North and South America and growth in the number of trainings from the Americas can be expected in the coming time.

Additionally, several Chinese companies are also looking at adopting the GWO standards and the first GWO Training Provider located in China was certified at the beginning of the year.

TOP 15 TRAINED NATIONALITIES

1	Great Britain	22.8%
2	Spain	16.0%
3	Germany	15.2%
4	Denmark	11.5%
5	Poland	6.7%
6	Portugal	3.4%
7	Netherlands	3.2%
8	USA	2.2%
9	Romania	2.0%
10	Belgium	1.8%
11	Sweden	1.7%
12	Turkey	1.1%
13	Ireland	1.0%
14	Italy	1.0%
15	France	0.9%
	Others	9.5%

There are more than 93 registered nationalities in WINDA, however, a large percentile of these 93 nations only have a few Delegates trained.

Based on the Delegates' nationality and compared with the previous diagram of Top 10 countries, the trained Delegates usually attend training in the GWO standards at a training site located in their own country of origin.

Poland is the only country in the Top 10 where the number of Poles trained in the GWO standards exceed those trained by Polish Training Providers. The opposite situation applies for the remaining 9 countries in the Top 10.

The top four nationalities UK, Spain, Germany and Denmark account for more than 65% of the trained Delegates.