

Expanding Your GWO Portfolio...

...to build a stronger training business

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1. EXPANDING YOUR GWO TRAINING PORTFOLIO WILL HELP YOU DELIVER MORE TRAINING AND ENHANCE YOUR CUSTOMERS' VALUE

2. KEY TAKE AWAYS

- Wind power growth means stronger demand for wind technicians and greater focus on combining safety and technical skills.
- Employers striving to enhance their safety and productivity performance will increasingly require their technicians and contractor personnel to train in a broader range of GWO modules.
- GWO certified training centres offering both basic and advanced modules, deliver more training records, train more people and grow their businesses faster than their peers offering only basic or specialist modules.
- Expanding your GWO training portfolio can provide plenty of commercial benefits, enhance your value proposition and accelerate demand for GWO training.

3. TRAINING CENTRES PLAY A KEY ROLE IN REMOVING BARRIERS TO HIRING AND BRIDGING THE SKILLS GAP.

GWO expects that 568,800 wind technicians will need industry standard training to build and maintain the global wind turbine fleet by 2026¹. This is roughly 28,400 annually from 2022 to 2026 and approximately four times the number of people with a valid Basic Safety Training (BST) certificate as today. Thus, it is crucial to map out a clear pathway into the wind industry that recognises people's existing skills and guides them towards the right training.

In October 2022, GWO published the Wind Technician Entry Level Framework endorsed by the industry's leading employers. This describes the recommended training pathways as a career entry route into job profiles within three functional areas: pre-assembly, installation and service. The Framework will facilitate the growth of a stable, competent entry level workforce, alleviate pressure on costs and resources and reduce bottlenecks in recruiting. GWO members and their employers will increasingly rely on training providers to access enough basic and advanced modules.

4. TRAINING CENTRES CERTIFIED IN BOTH BASIC AND ADVANCED MODULES TEACH MORE MODULES TO MORE PEOPLE.

For this analysis GWO segmented certified training centres into three groups:

¹ [Global Wind Workforce Outlook 2022-2026](https://www.globalwindsafety.org/statistics/global-wind-workforce-forecast-2022-2026) www.globalwindsafety.org/statistics/global-wind-workforce-forecast-2022-2026



- **Basic:** Training centres with a portfolio limited to basic GWO training modules (i.e. BST and BTT)
- **Specialist:** Training centres with a portfolio limited to a handful of specialised, non-basic GWO training modules (mostly focused on blade repair)
- **Diverse:** Training centres with a broad and diverse portfolio spanning basic and advanced GWO training modules

As of today, 45% of all GWO certified training centres are certified to deliver both basic and advanced modules and can be considered diverse. This 45% delivered 78% of all training records uploaded in 2022 to 77% of the people trained during the same year.

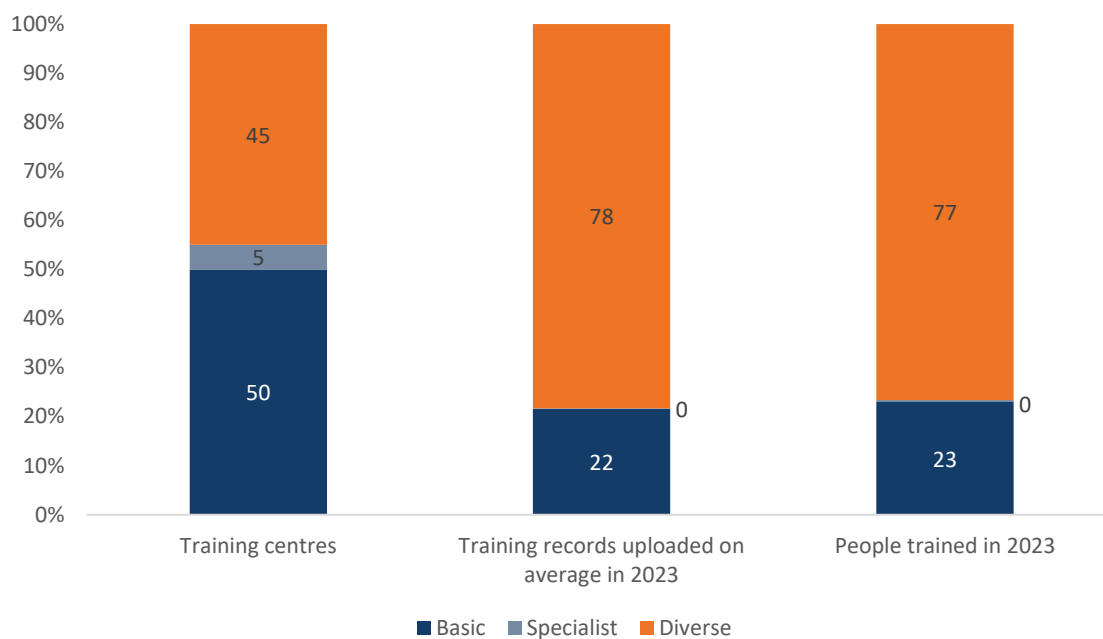


Figure 1, Percentage Share of Training Centres, Records Uploaded and People Trained in 2022 by Training Centre Type

Looking at the average figures for 2022, a diverse training centre delivered roughly four times more training records and people trained. This is approximately three times more people than their basic and specialist counterparts combined. This also means that they taught a higher number of modules per person (3.1 versus 2.7 and 1.0 respectively).

Admittedly, certification in a wide range of GWO training modules alone does not fully explain a training centre's performance, but a broader product portfolio does play a key role in enhancing the value proposition and driving demand for training.

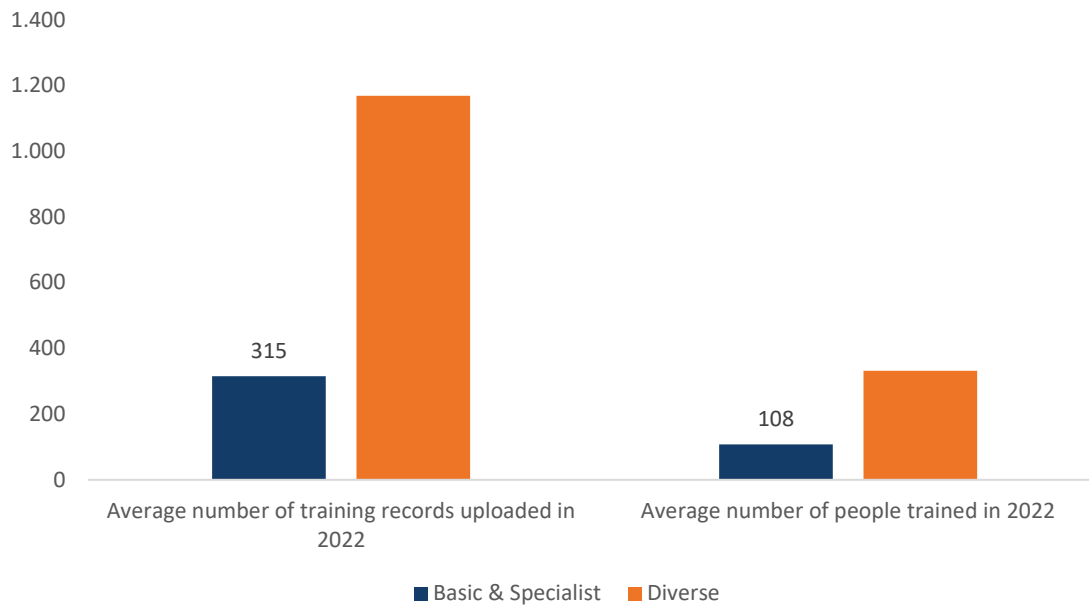


Figure 2, Average Number of Training Records Uploaded and People Trained in 2022 by Training Centre Type

5. DIVERSE TRAINING CENTRES GROW THEIR BUSINESS FASTER THAN THEIR BASIC AND SPECIALIST PEERS.

An analysis of all GWO certified training centres, active at least since 2018, shows that the number of courses delivered by diverse training centres increased much faster from 2019 to 2022 than the number of courses delivered by basic and specialist centres during the same period. The training records uploaded by diverse training centres grew by a 12% three-year Compound Annual Growth Rate (CAGR) versus only 1% from basic and specialist centres combined.

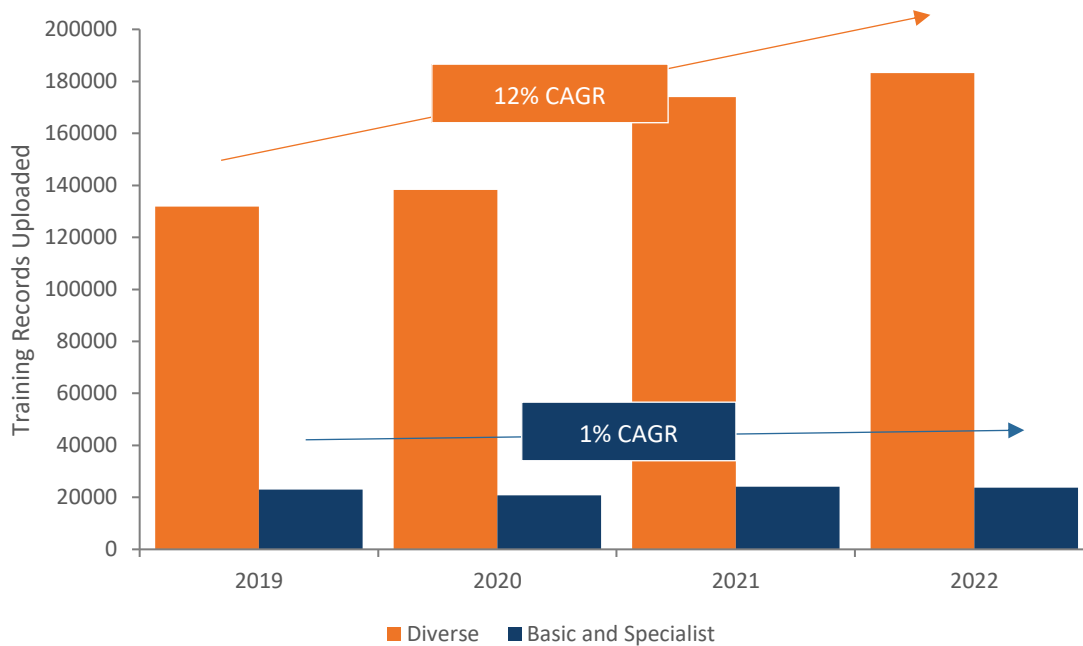


Figure 3, Three Year CAGR Comparison Across Training Centre Types

6. BROADER TRAINING PORTFOLIOS MEAN MORE MARKET DIFFERENTIATION THAT COUNTERS BST COMMODITISATION.

The number of GWO training providers active around the world more than doubled during the last four years. While this contributed to the safety of more technicians in a higher number of countries, it also increased price pressure on BST modules.

A broader range of GWO modules allows training providers to redefine their value proposition around their customers' needs. Offering customised and bundled training solutions not only helps training providers shift the focus from single modules but also helps differentiate their portfolios, optimises pricing discretion, and combats the corrosive effects of commoditisation. Their business will be powered to offer a compelling, differentiated, total value proposition that stretches well beyond being the lowest price.

7. A BROADER VALUE PROPOSITION ALSO ALIGNS WELL WITH GWO'S MEMBERS AND THEIR SPECIFIC PURCHASING PRIORITIES

GWO members and their contractors place a high value on their safety performance and have designed GWO training to minimise risk and maximise efficiency in the performance of a technician's everyday tasks. Training providers who support these objectives and provide best in class know-how within a comprehensive view of the customers' value can embed these broader value elements in the total cost of training as opposed to focusing on a module's price *per se*.



By broadening the range of GWO training and bundling it, for instance for entry level talent, training providers can redefine their value proposition around their customers' needs and so be better placed to be a training provider of choice. It also helps empower training providers to reduce their customer's total cost of training.

8. PREPARING FOR THE NEXT GROWTH PHASE

GWO's training standards have made strides across global wind markets, contributing to a safer and more competent workforce and enhancing employers' safety performance while providing a compelling business case for training providers. With the number of GWO certified training providers more than tripling and the number of GWO trained wind technicians growing eight-fold during the last five years, the growth trajectory is still steep.

A market totalling 568,800 technicians is waiting to be tapped and new markets have come under the spotlight as GWO members strive to secure a reliable provision of GWO training in the USA, China, Brazil, India, Japan, South Korea and Vietnam. Now GWO's community of training providers can prepare the next growth phase: deploying the modules relevant for entry level technicians to set the baseline for the wind workforce of the future