



ANNUAL REPORT 2018

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PROMOTING THE SAFE AND EFFECTIVE USE OF POWERED ACCESS WORLDWIDE

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SAFETY PROMOTION AND DEVELOPMENT



PROMOTING THE POWERED ACCESS INDUSTRY



INFLUENCING AND INTERPRETING LEGISLATION AND STANDARDS



MANAGEMENT AND OPERATOR TRAINING PROGRAMMES

WITH SPECIAL THANKS TO OUR SUSTAINING MEMBERS



Haulotte



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PRESIDENT'S REPORT

Nick Selley
IPAF President

PROGRESS ON KEY OBJECTIVES

When I became President of IPAF in 2017, I set out several objectives. Two years on, it's time to reflect on what progress has been made.

Improving collaboration with other organisations

Safety remains paramount and all our members need to stand behind these values and adhere to strict safety standards. IPAF continues to work tirelessly in improving standards through its campaigns to reduce accidents working in a number of areas, such as technical guidance and safety campaigns. IPAF was pleased to be involved in the introduction of the new ISO EN280 standard, and the work that IPAF is doing in respect of looking at the area of standardising key controls also seems promising. In my inauguration address, I also expressed a desire to promote greater collaboration with other organisations and industry groups. IPAF is now liaising with other groups worldwide, having developed closer links with the Hire Association of Europe and the European Rental Association. IPAF is working closely with the UK Health & Safety Executive and standards and safety bodies in the Middle East, as well as participating in the All Party Parliamentary Group (APPG) of UK MPs looking into falls from height in the workplace. I would also like to reference the success of IPAF's events in the Middle East, especially the UAE, with increased levels of attendance at events and providing a valuable platform for representatives of standards bodies and major contractors. This, of course, culminates in the IPAF Summit & IAPAs being hosted in the region for the first time ever in March 2019.

Apprenticeship programmes

I made a commitment to develop and promote apprenticeships, as I believe we need to do everything

possible to encourage young people into the industry and to develop talent. IPAF has made strides in identifying pathways to apprenticeships and qualified service technician status, which define new career paths in our industry.

Member benefits and value-added service

IPAF has made great progress in the area of value-added services through the appointment of a nominated insurance broker and the benefits that they can offer members and the opportunity to establish affiliate programmes to our training delegates in future.

Application of technology

IPAF remains committed to promoting new-generation learning and is also looking to technology to assist the safe use of MEWPs, with specific reference to virtual reality (VR) and extended reality (XR). IPAF's ten-month global consultation led to a comprehensive document setting out ways in which this technology might be applied to further improve standards. Simulator training enables IPAF training candidates to experience what it is like to be in a platform before they go up in one, while hazards and challenges can be introduced into a scenario for candidates to deal with effectively risk-free.

Financial management

IPAF has strengthened its infrastructure through various staff appointments, as well as investing in new IT and communications systems and, through the ELEVATE improvement programme, helping re-evaluate business performance to increase efficiency. IPAF performed well financially following actions taken at the start of 2018, which included the introduction of tighter financial controls and corrective actions to reduce costs in line with lower-than-expected revenues. As a result, IPAF is in a stronger and more robust position to face the challenges and opportunities of 2019 and beyond.



CEO'S REPORT

Tim Whiteman
CEO & Managing Director, IPAF

RISING TO THE CHALLENGE OF NEW OPPORTUNITIES

There's no doubt 2018 was a demanding year but IPAF rose to the challenge to embrace new opportunities. IPAF promotes the safe and effective use of powered access worldwide; reinforcing this message in existing territories as well as bringing it to new audiences is key to everything IPAF does.

Whether delivering IPAF training in markets as diverse as Mexico, Quebec, Denmark or Kazakhstan, in new languages including Russian, Romanian and Hindi, IPAF continues to extend its global reach. In countries such as the UK and Germany, where IPAF is well established, members continue to supply ideas and innovation to help deliver training, technical and safety guidance to reach the widest possible audience effectively.

UK members have shown great support for new events such as Elevation, as well as pushed for improvements such as the mandatory move to IPAF Rental+ standards for UK rental members. In Germany, IPAF members are similarly proactive – creating new evaluator-led test centres in which candidates may sit their IPAF operator practical having first completed the eLearning module online.

In an active year in Asia, IPAF made new connections and held events in Malaysia, Singapore and Thailand, while in China the powered access market is booming, with manufacturers, rental companies and regulatory bodies all looking to IPAF to help the industry grow safely and sustainably.

Similar growth is occurring in the Middle East, where the Expo2020 project in Dubai now only allows IPAF PAL Card

holders to operate MEWPs on site. In North America, updated standards place greater emphasis on operator and supervisor training.

IPAF constantly evaluates new technology, new courses and new ways of delivering training. In 2018, our members, staff and committees considered improvements to existing courses, including a new version of MEWPs for Managers available as eLearning, and updated operator training offered to IPAF Training Centres in all available languages to suit the widest possible range of candidates. IPAF also developed a new lift and hoist operator course, service technician qualifications and "IPAF certified" training, allowing member firms to deliver rigorously audited courses that fit their market.

2018 also saw virtual reality (VR) and simulators really grab the industry's collective imagination. IPAF consulted widely with stakeholders on the potential for VR and received a phenomenal response; it's clear our industry is keen to embrace this technology, and IPAF set out key recommendations in a white paper on extended reality in response to the consultation.

Thanks to the dedication of IPAF's Board, Council, Committees, staff and representatives working across almost 70 countries and utilising the IPAF ELEVATE management initiative to find creative solutions and efficiencies, the deficit as reported at the end of the 2017-18 financial year was reversed.

As a result, **your federation** entered 2019 more resilient, able to adapt to growing global demand for its quality training, technical and safety guidance, and to embrace exciting new opportunities. The future is bright.

IPAF AND ITS COUNCIL



IPAF promotes the safe and effective use of powered access equipment worldwide – through providing technical advice and information; through influencing and interpreting legislation and standards; and through safety initiatives and training programmes.

IPAF is a not-for-profit organisation owned by its members, which include manufacturers, rental companies, distributors, contractors, suppliers, training providers and users. IPAF members operate the majority of the Mobile Elevating Work Platform (MEWP) rental fleet worldwide and manufacture almost 90% of platforms on the market. IPAF also represents the mast-climbing work platform (MCWP) market.

Members enjoy access to practical information and a growing portfolio of member services. They also have the chance to influence the legislation and regulations that govern platform use.

Another benefit of membership is the ability to deliver the

IPAF training programme for platform operators, managers and supervisors which is certified by TÜV as conforming to ISO 18878. Around 170,000 candidates are trained each year through a worldwide network of more than 600 IPAF-approved training providers. Successful trainees are awarded the Powered Access Licence (PAL Card), the most widely held and recognised proof of quality-assured training for platform operators in the world.

The federation's governing body is the IPAF Council, which is composed of IPAF's Board members, Committee chairpersons, Country/Regional Council chairpersons and six directly elected members. Council members are elected for a two-year period by IPAF members.

BOARD MEMBERS AS AT END 2018

President
Nick Selley, AFI-Uplift

Deputy President
Brad Boehler, Skyjack

Vice President
Norty Turner, United Rentals

Immediate Past President (ex officio)
Andy Studdert

Managing Director & CEO
Tim Whiteman, IPAF

Director
Peter Douglas, Nationwide Platforms

Director
Karin Nars, Dinolift

Director
Karel Huijser, JLG

Director
Kai Schliephake, Partnerlift

COUNCIL MEMBERS AS AT END 2018

Jacco de Kluijver Genie/Terex

Arne Dirckinck-Holmfeld PB Liftechnik

Enrique Garcia Delgado Snorkel

Marcello Plonski Brasil
RCB Locações de Equipamentos e Máquinas

Mark Winfield HSS

Susan Xu Sinoboom

COMMITTEE CHAIRPERSONS AS AT END 2018

Chairperson, Manufacturers' Technical Committee
Ian McGregor, Skyjack

Chairperson, Mast Climbing Work Platforms Committee
Kevin O'Shea, Hydro Mobile

Chairperson, Training Committee
Richard Lofts, Nationwide Platforms

Chairperson, IPAF Rental+ Committee
Steven Gerrard, Lifterz

Chairperson, Brazilian Country Council
Gustavo Faria, Terex/Genie

Chairperson, Hong Kong Council
Tony Small, Gammon Construction

Chairperson, Irish Council
Julie Smyth, Highway Plant

Chairperson, Italian Country Council
Nicola Violini, Haulotte Italia

Chairperson, Netherlands Country Council
Martijn Kamphuis, Kamphuis Hoogwerkers

Chairperson, North American Regional Council
Ebbe Christensen, ReachMaster

Chairperson, Singapore Country Council
Daniel Ho, Terex Singapore

Chairperson, Spanish Country Council
Florencio Alonso, AP Aerial Platforms

Chairperson, UAE Country Council
Robert Cavaleri, Manlift Middle East

Chairperson, UK Country Council
Brian Stead, Loxam Access

WORK OF THE COUNTRY AND REGIONAL COUNCILS



IPAF's country and regional councils consider specific issues and make requests to the IPAF Council for discussion and action. They organise activities and events to promote the safe use of powered access. In 2018 the IPAF Council approved a new constitution for all country and regional councils to adopt. Other activities of the councils in 2018 included:



The **Middle East Regional Council** sought to develop partnership training and introduce extra training for operators with less experience or knowledge than in other regions. The new IPAF-recognised service technician training will be piloted in 2019.

Contact: uae@ipaf.org

The **North American Regional Council** launched Innovate – a workshop for attendees to consider responses to key industry concerns, which were then presented for all to evaluate and in turn for IPAF to take forward, steered by the council. One solution developed new language regarding retraining that was sent to standards committees for future consideration. Ebbe Christensen of Reachmaster assumed the chair, thanking outgoing chair Teresa Kee of United Rentals, who remains on the council, for all her hard work.

Contact: usa@ipaf.org

The **Brazilian Country Council** noted the Brazilian authorities were drafting a standard for MEWPs, based on the new US ANSI A92 suite of standards. There was a consultation in the first quarter, with the standard due for publication at the end of 2018. A regulation setting a maximum of three manufacturer members on the council was approved.

Contact: portugues@ipaf.org

The **Singapore Country Council** actively supported activities across wider South East Asia and assisted in jointly organising the 2018 Work at Height Forum 2018, co-hosted by the Singapore Institution of Safety Officers and the Workplace Safety & Health Council and attended by Zaqy Mohamad, Minister of State for Manpower.

Contact: sea@ipaf.org

A newly constituted **Hong Kong Regional Council**, chaired by Tony Small of Gammon Construction, met for the first time having been recognised in 2017.

Contact: sea@ipaf.org

The **IPAF Spanish Country Council** asked IPAF to publicise advances in "clean" power sources and how these can aid compliance with tough new EU emissions laws. The council also asked that IPAF's Competent Assessed Person (CAP) qualification be extended to Spain; this was duly made available from November.

Contact: espana@ipaf.org

The **Irish Council** adopted a new constitution and will select 12 representatives at the next meeting, at which Julie Houston-Smyth will step down as chair. The council is discussing whether newly accredited independent instructors on the island of Ireland should be affiliated to an IPAF Training Centre in Northern Ireland or the Republic.

Contact: info@ipaf.org

The **UK Country Council** continues to monitor its decision to require the IPAF Rental+ standard for UK members. A new event called Elevation launched, which was held in September and proved a success, with a date being set for it to return in November 2019. The council was involved in reviewing a roadmap to service technician qualification, and supported the apprenticeship approved in October 2018. A new constitution was also adopted.

Contact: info@ipaf.org

The **Italy Country Council** asked for a telehandler operator course developed by Italian members to be reviewed by IPAF staff and the Training Committee to consider if IPAF might adopt it.

Contact: italy@ipaf.org



WORK OF THE COMMITTEES



The IPAF Manufacturers' Technical Committee (MTC) and Vehicle-Mounted Manufacturers' Technical Committee (VMMTC) are two of the access industry's leading global groups. All manufacturer members of IPAF are entitled to be involved with the committees.

During 2018 these committees and their members were principally concerned with the introduction of updated US and Canadian standards. With the new ANSI A92 suite of standards published in December, IPAF issued guidance for companies or individuals seeking to become compliant with North American standards. New safe use standards were also introduced or being developed in Malaysia, UAE, the UK, Spain and Brazil during 2018.

Discussions took place about how IPAF can improve the reach and effectiveness of its accident reporting project, and the Fatal Injury Rate (FIR) analysis for 2017 was published at Europlatform in Belfast, Northern Ireland, in October. Andrew Delahunt, IPAF's Director of Technical & Safety (pictured above) said that, while the number of fatalities rose from 66 in 2016 to 83 in the year, this in part was down to enhanced reporting. There were nonetheless concerning aspects to the analysis, he added, not least when broken down by causes and geographical occurrence of accidents leading to fatalities.

The most common cause of deaths in 2017 was electrocution, taking over from falls from the platform in 2016. Germany and the UK were the benchmarks for MEWP safety.

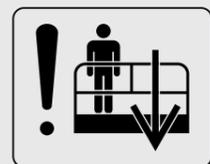
The FIR analysis fed into IPAF's global Plan Ahead for Safety campaign, launched at Intermat in Paris, France, with a safety trail at Vertikal Days at Donington Park in the UK. This explains why operators and supervisors of MEWP operations should carry out risk assessments, choose the correct equipment for the job, conduct site and machinery inspections, use trained operators under supervision, and implement segregation from other machinery and traffic.

In respect of new resources to aid the safe planning of MEWP operations, IPAF finalised the suite of Business Information Modelling (BIM) MEWP and MCWP models available to download free from the UK-based National BIM Library; adopted a new online spreader pad calculator; and developed new safety and warning stickers.

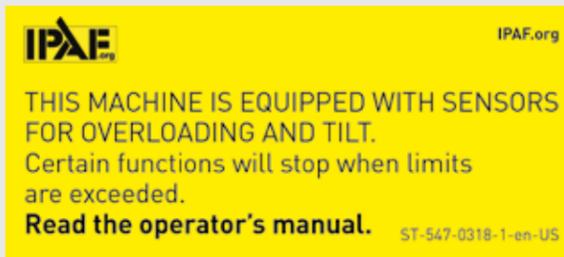
IPAF updated technical guidance including H1: Harness and F1: Familiarisation leaflets, MEWP category, special equipment, spreader pad posters and rescue planning advice. IPAF also developed new guidance for MEWPs in public spaces, zero wind-rated machines (defined in ANSI standards), using MEWPs as an overhead anchor point, and released new Andy Access safety posters and Toolbox Talks.

There was a change in leadership of the IPAF MTC, with Ian MacGregor of Skyjack taking over from Phil Godding of JLG as chair, thanking him for his hard work and leadership. In addition, the IPAF VMMTC considered how best to respond to the end of the exemption to MOT testing requirements for truck-mounted MEWPs in the UK and the Road Haulage Association's invitation to join its European truck cartel claim.

IPAF's technical committees continue to collaborate with a range of organisations, committees and inquiries including the Access Industry Forum, Access Link, Access Alliance, European Rental Association, the Strategic Forum Construction Plant Safety Group, the Construction Plant-Hire Association, the UK All Party Parliamentary Group looking at falls from height in the workplace, the British Materials Handling Federation, CITB Advisory Forum, Combined Industries Theft Solutions, Build UK, the European Materials Handling Federation and various standards committees.



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IPAF TRAINING COMMITTEE

The **IPAF Training Committee** spearheads the IPAF training programme and meets quarterly to review issues related to course content, materials and training centre requirements. Meetings and working groups of the training committee in 2018 addressed:

Operator practical test – revised

Load and unload course – upgrade scheduled for 2019

Revision of the Operator Safety Guide – to publish in 2019

MEWPs for Managers – revised and available in eLearning

Risk assessments to be made an integral part of the operator practical evaluation, and a new risk assessment document to be used in training

Pre-Delivery Inspection (PDI) course revision – due in 2019

Operator Questions Paper – revision of questions, creating potential for digital testing

Telehandler Working Group reviewed potential for IPAF to offer telehandler training

Reviewed guidance for basket-to-basket rescue in line with Strategic Forum Plant Safety Group's new *Rescue of Persons from MEWPs* guidance.

IPAF CAP COMMITTEE

Work of the **IPAF Competent Assessed Person** Committee across 2018 included:

A review of the CAP profiling score card

PDI (INSP) course revision, due in 2019

Development of CAP for MCWPs, scheduled for 2019

The new IPAF Service Technician Roadmap, and how it feeds into the CAP qualification

CAP made available in Spain

In 2019 the committee will review options for further expansion into other countries.

INTERNATIONAL MCWP COMMITTEE

IPAF's **MCWP International Committee** held meetings by conference call in January and in person in Miami, US at the IPAF Summit in March. Topics discussed included:

Feasibility of an industry apprenticeship programme for MCWPs and hoists

How to make the industry attractive to young people and career-minded professionals

How to promote the use of MCWP in industries/sectors where they are not widely used.

The **MCWP UK & Ireland Working Group** met at Donington Park during Vertikal Days in May, and in Coventry during Elevation in September. Topics discussed included:

Update on the MCWP CAP card

The latest Construction Hoist Interest Group (CHIG) meeting

New Andy Access safety posters for MCWPs

The new IPAF course for hoist operators.

Topics discussed at both UK and international level during these meetings included:

Changes in IPAF MCWP training material to reflect the updated BS7981:2017 standard

Greater co-operation with CPA-CHIG group

The new hoist course being developed.



THE IPAF RENTAL+ COMMITTEE

The **IPAF Rental+ Committee** has continued to monitor and act on feedback from members about the new IPAF Rental+ audit. Five special workshops have been run for members in the UK, and these have provided valuable input and feedback to allow refinement of the accreditation.

The scheme consists of 70 audit criteria and, if passed, includes SSIP accreditation. Members have the opportunity to achieve the IPAF Rental+ standard to bronze level by passing in all 70 questions, silver by achievement of 70 questions at bronze level and 80% of the silver-level questions or gold by achievement of 70 questions at bronze and silver level and 80% of the gold-level questions.

This has been revised from the original criteria of having to achieve 100% in each level to gain the accreditation to that level. The portal to upload data prior to audit has also been simplified and is easier to use. IPAF members decided in 2017 to require all UK rental members to achieve IPAF Rental+ standard. The deadline of 1 September 2019 to comply with the criteria is approaching, and all UK members will need to comply by this date as mandated by the UK members. The IPAF Rental+ accreditation continues to be available to IPAF members outside the UK as a voluntary scheme.

The IPAF Rental+ committee, under the leadership of chairman Steve Gerrard of Lifterz, is now seeking applications from rental member companies to join the committee following retirements and ends of term of committee members.



IPAF AROUND THE WORLD IN 2018



ALGERIA
ARGENTINA
AUSTRALIA
AUSTRIA
BAHRAIN
BELGIUM
BRAZIL
BULGARIA
CANADA
CHILE
CHINA

COLOMBIA
CZECH REPUBLIC
DENMARK
ECUADOR
FINLAND
FRANCE
GERMANY
HONG KONG SAR
HUNGARY
ICELAND
INDIA

INDONESIA
IRAN
IRAQ
IRELAND
ITALY
JAPAN
JORDAN
KAZAKHSTAN
KUWAIT
LATVIA
LEBANON

LIECHTENSTEIN
MALAYSIA
MEXICO
MOROCCO
MYANMAR
NETHERLANDS
NEW ZEALAND
NORWAY
OMAN
PERU
POLAND

PORTUGAL
QATAR
ROMANIA
RUSSIA
SAUDI ARABIA
SINGAPORE
SLOVENIA
SOUTH AFRICA
SOUTH KOREA
SPAIN
SWEDEN

SWITZERLAND
TAIWAN
THAILAND
TUNISIA
TURKEY
UAE
UK & CHANNEL ISLANDS
USA
URUGUAY
VIETNAM
ZAMBIA

CANADA

Demand for French-language IPAF operator training rose in Quebec, with several new IPAF Training Centres becoming accredited. Updated CSA B354 Standards became effective in Canada during May 2018; IPAF issued specific guidance for MEWP users and dealers seeking compliance.

UK

The inaugural Elevation in Coventry, with its blend of meetings, mini seminar programme and gala dinner with entertainment, proved very popular. It was announced that UK-issued PAL Cards will be able to carry CSCS logos from 2019. IPAF reported to the All Party Parliamentary Group looking at falls from height in the workplace.

IRELAND

The IPAF Irish Council voted to adopt a new constitution that brings it into line with other country and regional councils and better reflects the growing membership in both the south and north of Ireland. Northern Irish members were pleased to welcome IPAF's Europlatform conference to Belfast, with more than 150 delegates in attendance.

DENMARK

Riwal delivered more than 500 PAL Cards in Denmark, driven in part in by the requirement that contractor Mace required all users of MEWPs on its site in Odense to hold the IPAF qualification. Further IPAF training centres were also IPAF-accredited during 2018.

USA

The long-awaited ANSI A92 suite of Standards was published on 19 December, and IPAF published a set of guidance documents to help member firms understand their responsibilities and requirements for compliance. The inaugural IPAF Innovate was held in Houston, Texas, in October and the 2018 IPAF Summit and IAPAs was hosted in Miami, Florida.

MEXICO

Mexico hosted its first ever annual meeting and Professional Development Seminar (PDS) for IPAF-accredited training instructors in November, with some attendees travelling from as far afield as the southern US to attend the Mexico City-based event.

PORTUGAL

IPAF attended the International Fair of Equipment, Machinery & Services for Industry (EMAF) in Porto, Andy Access renewing his friendship with Napo, the Mascot of the EU-OSHA, in an entertaining stage performance demonstrating MEWP safety best practice.

GERMANY

IPAF launched new evaluator-led Test Centres in Germany in 2018, with training candidates able to take the eLearning theory module and then sit a practical test to obtain their PAL Card operator licence.

ITALY

IPAF and Italian MEWP manufacturer CMC jointly hosted a conference in Bari, offering attendees a chance to meet manufacturers, rental companies and suppliers of powered access equipment to learn how to conduct temporary work at height using MEWPs.

ROMANIA

IPAF began translating training into Romanian for the first time, in an initiative sponsored by member firm Industrial Access (a TVH Company).

KAZAKHSTAN

IPAF's PAL Card operator training launched in a new language and territory – with member firm Riwal delivering courses in Russian in Atyrau, Kazakhstan, owing in part to increased demand for trained MEWP operators to work on the nearby Tengiz Oil Field.

RUSSIA

Tim Whiteman, IPAF's CEO and Managing Director, presented at HAACT's 2nd International Forum of Rental and Construction in Rostov-on-Don, Sochi, and received many expressions of interest in the IPAF operator course, newly translated into Russian.

CHINA

IPAF representatives made several visits to member firms including Sinoboom in Changsha and opening a MEWP production line at Zoomlion. IPAF also attended bauma China and presented at the International Rental Conference, both in Shanghai. The IPAF Asia Conference 2019 will be in Hangzhou on 17-18 July.

THAILAND

IPAF hosted its inaugural IPAF Thailand Seminar in September in conjunction with INTERMAT ASEAN at the Impact Exhibition and Convention Centre, Muang Thong Than. More than 60 delegates attended to hear an engaging line-up of speakers.

UAE

The fourth IPAF Middle East Convention in Dubai was the best attended yet, with around 250 delegates; it was announced at the event that the Expo2020 construction project would only accept IPAF PAL Card-holders on site. IPAF's Summit & IAPAs 2019 will be in Dubai on 6 March, held for the first time ever in the region.

MALAYSIA

IPAF's Malaysian members worked together to create *Choose Safety*, a short film with a global safety message that premiered at the IPAF Asia Conference in July in the capital Kuala Lumpur. The first ever IPAF Malaysia Forum was also held in Kuala Lumpur.

IPAF HAD A TOTAL OF 1,335 MEMBERS ACROSS 65 COUNTRIES

IPAF STRATEGY



The MEWP training sector is undergoing a virtual reality revolution, and IPAF aims to be at the forefront of it. Today's MEWP simulators are so advanced that experienced operators have been known to reach for an imaginary harness while operating them, or even suffered vertigo! In 2018, IPAF led an industry-wide consultation into this exciting new technology, and produced a detailed strategy paper based on the findings.

IPAF's members worked with IPAF to produce a policy document on how virtual reality systems can be effectively and safely harnessed to train MEWP operators. This led to a ground-breaking set of recommendations that are being implemented in 2019.

We wanted to hear from everyone, people who had never used a MEWP before to senior IPAF instructors, from school children to powered access pioneers and those in leadership roles of major industry bodies, rental companies and manufacturers.

One of the most effective and interactive ways IPAF achieved this was through the use of a sophisticated MEWP simulator, developed by an IPAF member firm. IPAF took several versions of the simulator to demonstrate at numerous events, including the IPAF Summit in Miami, US; Intermat in Paris, France; Vertikal Days and Elevation in the UK; the IPAF Asia Conference & Showcase in Kuala Lumpur, Malaysia; and the Euro Institut: Health And Safety Forum at the EU Parliament in Strasbourg, France.

IPAF also took the simulator to other events aimed at college leavers, construction and health & safety officials, to broaden the base of engagement as widely as possible, and to ensure that input to the consultation did not become a closed shop facing only powered access specialists. All those who tried the simulator, or who had tried different VR or simulator applications, were invited to respond via an online survey on IPAF's website.

The feedback IPAF received was phenomenal, and in the final months of 2018, a team of IPAF staff drafted an eXtended Reality (XR) strategy paper, setting out key recommendations and objectives, and developing an implementation strategy for 2019 and beyond.

Among overall conclusions in the consultation response was that there are substantial reasons to use XR to improve training, and no prior technology has shown as much potential to revolutionise the way IPAF provides candidates with the knowledge and skills to stay safe.

A common concern raised by respondents was that exclusive use of XR for operator training could create "a sense of invincibility" as operators can simply "reset" after an accident.

IPAF resolved not to enforce the use of XR technology in its training courses, but that it would not prevent the use of XR to enhance training.

IPAF ruled out developing XR equipment or simulators itself, opting instead to develop a system under which it may review, approve and certify XR hardware and software that could be used to interface with IPAF's own training programme, in particular the IPAF PAL+ qualification, or play other key functions in delivering familiarisation and safety instruction relating to MEWP and MCWP use.

www.ipaf.org/XRstrategy



IPAF's strategy paper states that XR can be applied to:

Complement IPAF's guidelines and advice for the safe use of powered access

Enhance learning for operators

Enhance safety for operators.

Furthermore, the paper posits that:

VR simulators can be used to prepare candidates effectively for practical testing

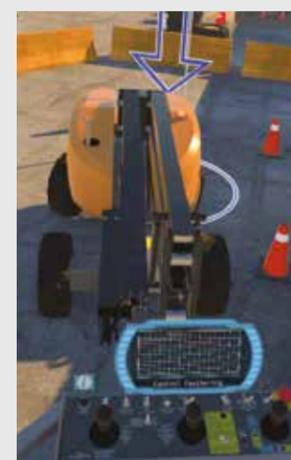
AR would enhance pre-use inspection of MEWPs and enrich theory and practical training

Interactive 360° videos can contextualise a range of hazards associated with MEWP use

VR simulators could play a major role in refresher training, to test ongoing operator competency.

The IPAF XR strategy paper was approved for publication by the IPAF Council and Board in the final months of 2018.

IPAF resolved to work closely with members and those developing XR hardware and software to implement its XR strategy, which will provide a framework and terms of reference for those seeking to apply or adopt the technology to enhance accredited or recognised training and complement the safe use of powered access worldwide.



IPAF'S THREE-YEAR STRATEGIC PLAN

The IPAF Three-Year Strategic Plan has been created to outline the major objectives for the organisation and to measure and demonstrate progress towards those goals.

Key areas of focus to be developed:

Develop and implement a strategy to optimise the use of VR, simulators and IPAF's eLearning offer.

Integrate the PAL Card into systems to deliver a full digital experience.

Engage with IPAF PAL Card holders via membership or subscriptions, meetings, eNewsletters and other media.

Create career paths for people employed in the industry – from PDI courses to fully qualified MEWP technicians.

Reduce the Fatal Incident Rate by creating and sharing industry standards, campaigns and MEWP best practice.

Identify opportunities to expand into new countries.

The primary objectives of IPAF remain to:

Promote and extend the use of members' products on a worldwide basis and take action on all matters of interest to the powered access equipment industry. Encourage the highest standards of safety and good trading.

Represent the industry in discussions at government level and to liaise with other trade associations as necessary.

Co-operate in the establishment of standards.

Provide for co-operation between members in the discussion of common problems and do all such other lawful things as are conducive to achieving the above objectives.

Increase the global footprint of IPAF and actively target the involvement of the industry's main players.

Maximise the benefits of membership and efficient use of the Federation's resources in an organisation dedicated to the safe and effective use of powered access.

Provide, facilitate and expand communication channels among all IPAF members.

Provide education and training for the whole industry.

The strategic aims of IPAF over the three-year period are to:

Promote the safe and effective use of powered access worldwide.

Ensure the sustainability of the federation and strengthen the IPAF brand worldwide.

Deliver enhanced benefits to members and to encourage their greater participation.

In addition to the aims, objectives and areas for development identified in the plan, IPAF commits to continuing to provide a range of support services to members and the wider powered access industry.

The IPAF Three-Year Strategic Plan can be viewed in English at www.ipaf.org/resources

IPAF TRAINING



IPAF training underwent a global review during 2018, with changes to the Training Committee, feedback from members and instructors, new courses, new languages and major updates to the existing courses. Updated IPAF Training has received positive reviews, though there's always more work to be done.

Perhaps the most significant changes to IPAF Training concerned the ongoing roll-out of updated operator training, now live worldwide and receiving very positive feedback from instructors and candidates. IPAF Training Centres worldwide are also now able to request eLearning or classroom support modules with globally neutral legislation sections in any available language, to best suit their individual needs and to deliver operator training to the widest possible range of candidates.

The final months of 2018 were also dedicated to reviewing, finalising and road-testing the new version of IPAF's MEWPs for Managers course, available during January 2019 in both the eLearning suite and as an enhanced tutor-led version. The course is heavily exercise-based and now features interactive 360-degree images and graphics to contextualise hazards and risks, requiring higher-order thinking skills that enhance learning and retention.

The IPAF Training Committee again gave their time and expertise freely – without members' significant effort and commitment IPAF could not have achieved so much in 2018,

and we thank all of them for valued input. In 2018 there were changes at the head of the Training Committee, with Charlie Ellis stepping down as chair to be replaced by his Nationwide colleague Richard Lofts. Charlie is owed a debt of thanks for his tireless work to make the committee and associated working groups responsive to the needs of members, while also being able to push through significant change and improvement to the worldwide training programme, without which the progress made in 2018 would not have been possible.



Across 2018, there were many training-related milestones, including:

Global roll-out of the new version of IPAF operator training. New languages available, including Russian and Danish, and operator test papers available in more languages

An updated training manual translated into 11 languages

A new IPAF lift and hoist course approved

Technology allowed more interactive elements to both operator and MEWPs for Managers courses. MEWPs for Managers overhauled and prepared for launch in eLearning in 2019

New IPAF-recognised training providers to facilitate a new IPAF roadmap to qualified service technician status

In addition to the ongoing worldwide PDS programme for IPAF instructors, PDSs in Mexico, Scotland, Denmark and one for MCWP instructors were held for the first time

Review of the possibility of IPAF offering telehandler training, using a proposed template course created by a group of Italian IPAF members

New fraud prevention measures implemented

Testing completed to allow IPAF to place CSCS hologram on UK PAL Cards in 2019

New evaluator-led training centres in Germany, with theory element delivered via eLearning only.



In 2019, key IPAF Training priorities will include:

Reviewing and updating the PAL+ course, including the possibility of using MEWP simulators in training

Reviewing and updating load/unload and pre-delivery inspection (PDI) courses

Reviewing and updating IPAF's Competent Assessed Person (CAP) training and extending to more countries

Reviewing and updating the operator renewal course and methods

A major review of the IPAF operators' safety guide

Developing training courses in new languages including Swedish and Romanian

IPAF service technician training to be extended to new territories including the Middle East

Issuing new Andy Access safety posters and Toolbox Talks, and in additional languages

Continuing to develop an online refresher module for operators in Germany, who are required to update certification annually

IPAF North America offering technical guidance and training support to help powered access companies recognise the requirements for operator and manager training to become compliant with new ANSI A. 92 standards, published December 2018, and new CSA B3 54 standards, effective as of May 2018.



IPAF'S AUDITING ACTIVITIES



2018 marked an exciting year for the Quality Department at IPAF. We had some changes in personnel, an increase in successfully completed IPAF Rental+ audits and IPAF as an organisation was also accredited to the new ISO 9001:2015 standard certified by TÜV Rheinland in September 2018.

At the heart of the Quality Department are the audits on IPAF Training Centres, IPAF Instructors and on rental companies. In 2018, IPAF's auditor team completed more than 350 Training Centre audits, over 50 IPAF Rental+ audits and more than 800 telephone surveys.

The new IPAF Rental+ audit regime, which was mandated for all UK rental members by the UK Country Council in September 2017, means that all IPAF rental members are working to the same standards. This comprehensive audit adds recognised value to the rental businesses and reduces time and cost spent implementing other pre-qualifying questionnaires.

As a member-driven organisation, we have listened to feedback from members and held five IPAF Rental+ workshops in various locations across the UK during 2018 to provide support for members progressing through the IPAF Rental+ audit.

Last year another milestone was achieved, with IPAF being accredited to ISO 9001:2015 standard. This audit required months of intensive planning and preparation and required the involvement and support from all departments at IPAF; feedback from the auditors was extremely positive.

In December, IPAF successfully renewed its Safety Standards In Procurement (SSIP) accreditation, with the auditor commending IPAF as an "outstanding ambassador" for the certification. All IPAF Rental+ member companies are automatically accredited with SSIP status when achieving the minimum standard.

The Quality Department also welcomed new members of staff in 2018. The auditing team was strengthened by the appointment of Patricia Marquez, Auditor for Spain and Portugal, and Jens Maassen, who joined IPAF as an Auditor for the Southern region of Germany and parts of Austria.

In the UK office, Colleen Hunt joined the team in August as maternity cover for Kate Miller. IPAF's long-time Auditor for Scotland, Chris Smith, decided to pursue new challenges and left IPAF at the end of August. Scotland is now being covered by existing IPAF Auditors James Firth and Martin Wraith.

The IPAF Quality Department consists of:

Lynn Price, Audit & QC Manager

Colleen Hunt, Audit Administrator and maternity cover for

Kate Miller, Quality Analyst

Katrin Blau, Audit Administrator



Peter Boeijer, Auditor for the Benelux Region

Reinhard Sebulke, Auditor for Germany

Jens Maassen, Auditor for Germany and Austria

Andrew Boldrini, Auditor for Italy

Patricia Marquez, Auditor for Spain and Portugal

Kurt von Arx, Auditor for Switzerland

Diego Navarro, Auditor for Brazil, Argentina, Chile

Jorge Ramirez, Auditor for Columbia, Peru, Mexico

Ovais Qureshi, Auditor for the Middle East

Geoff Carr, Auditor for the United Kingdom

Andrew Page, Auditor for the United Kingdom

Martin Wraith, Auditor for the United Kingdom

James Firth, Auditor for the United Kingdom

Susan Price, Telephone Auditor

MEMBERSHIP SERVICES

LOBBYING & REPRESENTATION

IPAF makes representations to relevant authorities on issues of concern to its members.

MONITORING INDUSTRY DEVELOPMENTS

IPAF actively participates in many committees around the world and also represents members in discussions with organisations such as the American Rental Association, the European Rental Association and the Scaffold & Access Industry Association.

IPAF EXPERTS

IPAF staff collectively have more than 300 years' industry experience from around the world. That expertise is at members' disposal.

TECHNICAL HOTLINE

Members needing advice on matters ranging from risk assessment to platform use and accident procedures can call IPAF head office or an IPAF country representative.

SPONSORSHIP & MAGAZINE ADS

Members are given priority for IPAF event sponsorship opportunities and magazine advertising.

HIRE TERMS & CONDITIONS

IPAF terms and conditions of hire are available free to members for their exclusive use.

CONFERENCES

Various events are offered at a discounted rate for members, including Europlatform and IPAF's Asia Conference. www.ipaf.org/events

EXCLUSIVE ONLINE CONTENT

Content and resources including minutes of meetings, presentations, safety and technical guides are available exclusively to members by logging into www.ipaf.org

ACCESS TO BSI, ISO & EN STANDARDS

Members have access to search and browse the British Standards Online Library (BSOL) and full read access to a collection of specific MEWP and MCWP standards.

MEMBERSHIP BENEFITS



ACCESS INTERNATIONAL FREE SUBSCRIPTION

Members receive a free subscription to IPAF's official magazine, *access international*.

BUSINESS INFORMATION

Members receive the Business Information Service from the Institute of Directors. This offers up to 30 minutes' desk research on any business related subject.

DISCOUNTED ONLINE CONTINUOUS PROFESSIONAL DEVELOPMENT

Members receive a discount on Leap Like a Salmon's bespoke CPD management system that keeps career development, learning, plans, records and journals all in one place in an ePortfolio.

EQUIPMENT RENTALS INSURANCE

Members and IPAF Rental+ members receive reduced rates from JCB Insurance Hiremax, which offers services specifically designed for rental companies.

INSURANCE

UK members receive reduced premiums with Henderson Insurance Brokers.

IPAF RENTAL REPORTS

IPAF's annual *Global Powered Access Rental Market Report*, compiled exclusively for IPAF by Ducker Worldwide, holds a European Association Award 2018 for Best Provision of Industry Information and Intelligence. Members can obtain rental market reports at a discounted rate. www.ipaf.org/reports

LEGAL CONSULTING SERVICE

Members can turn to a legal and technical service offered by Italy-based Lext Consulting and Servizi Impresa.

RENTAL MANAGEMENT SOFTWARE

IPAF members can get a 10% discount on rental management software from inspHire.

IPAF membership services, benefits and special offers may not be available in all countries and/or all languages. They may also become unavailable or be withdrawn at any time, without notice.

Do you have an offer or discount to offer to IPAF members? Please email faith.cobaine@ipaf.org

IPAF MILESTONES



IPAF LAUNCHES GLOBAL VR CONSULTATION

With the increasing sophistication of virtual reality (VR), augmented reality (AR) and MEWP simulators, IPAF launches an industry-wide consultation on the possibilities for embracing and adopting new technology in MEWP training and safety awareness. The consultation runs for ten months, until 1 October.

IPAF announces it is making its training accessible to the widest possible range of candidates, by offering approved training centres access to eLearning and classroom theory modules in all available languages.

Andrew Delahunt, pictured, takes up post as IPAF's new Director of Technical & Safety.

JANUARY



MAJOR OVERHAUL OF IPAF WEBSITE GOES LIVE

As of 1 February, IPAF launches a major upgrade of its website, featuring a complete design overhaul, more interactive menus and an intuitive interface that automatically picks up a user's region and language settings. The website is more responsive and there are new features including a function that allows users to search for their nearest accredited IPAF Training Centre by location.

In São Paulo, Brazil, IPAF's ElevAÇÃO Seminar and PDS event is once again a success, with around 150 attendees over the course of the two-day conference and training instructors' workshop.

IPAF members are invited to give their responses to the All Party Parliamentary Group in the UK, led by Alison Thewliss MP, pictured, looking into falls from height in the workplace, with their views being collated and submitted as part of IPAF's official consultation response ahead of the March deadline.



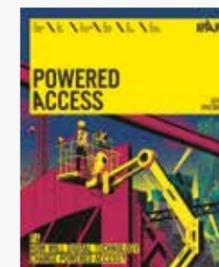
FEBRUARY

IPAF LAUNCHES NEW GLOBAL SAFETY CAMPAIGN IN PARIS

Visitors to the IPAF stand at Intermat 2018 in Paris, France, try their hand at using a MEWP at height without ever leaving the ground thanks to a virtual reality (VR) MEWP simulator being showcased as part of the ongoing worldwide consultation on the technology. IPAF also uses the trade show to launch its Plan Ahead for Safety global campaign, emphasising the importance of proper planning, training, familiarisation and supervision when conducting temporary work at height using MEWPs.

IPAF exhibits for the first time at Nordbygg in Stockholm, Sweden, pictured. Demand for IPAF-accredited operator training is booming across Scandinavia, owing in part to a raft of international contractors demanding PAL Cards for operators of MEWPs on their sites.

Around 35,000 copies of IPAF's *Powered Access* magazine are circulated with *Construction Manager* magazine in the UK and Ireland, the first edition produced with IPAF's new publishing partner Atom.



MARCH

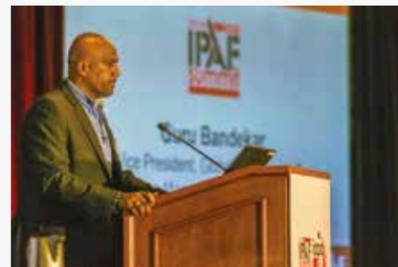
STELLAR NAMES SHINE AT IPAF SUMMIT & IPAS

Around 300 industry professionals gather on 8 March in Miami, US, for the IPAF Summit, hearing from the likes of Bill Plummer, EVP & CFO of United Rentals; Guru Bandekar, Vice President, global engineering & program management at JLG, pictured, and Pedro Luis Fernández Pérez, Chairman & CEO of Spanish rental company GAM. In the morning, IPAF's AGM sees Susan Xu of Sinoboom, pictured, elected to the IPAF Council and IPAF's Annual Report

is launched in eight language versions, including for the first time in Chinese.

In the evening there's a gala dinner to honour the International Awards for Powered Access winners; Dan Kaplan, renowned rental consultant and author who spent 15 years as president of Hertz Equipment, receives the International Lifetime Achievement Award.

IPAF's Italian-language magazine *IPAF-Infoma* is published in print and digital versions.



APRIL

IPAF MILESTONES



VR SIMULATOR DRAWS CROWDS AT VERTIKAL DAYS

The Vertikal Days event at Donnington Park Circuit in the UK features a Plan Ahead safety trail, pictured top right, and the VR MEWP simulator also draws the crowds to the IPAF stand.

The first ever IPAF ANCH'IO, pictured, is hosted in Bologna, Italy, with attendees congregating for networking, a product and equipment showcase and lively

discussions of industry topics. The event also sees the world premiere of *Safety Blues*, a musical recital on the theme of falls from height.

The German-language *IPAF-Journal* magazine is published in both print and digital format, with a distribution of around 40,000 copies in Germany, Austria and Switzerland.



MAY

MEWP RENTAL MARKET BOOMING, FINDS REPORT

The global MEWP rental market is booming, with the sector outstripping wider construction and sustained recovery in places such as Spain and Brazil that suffered economic downturn. This is according to IPAF's latest *Powered Access Rental Market Report*, compiled by leading global research company Ducker Worldwide. Earlier in 2018, IPAF's global rental market reports won Bronze for Best Provision of Industry Information and Intelligence at the European Association Awards. All reports can be downloaded or ordered via www.ipaf.org/reports

IPAF also launches an update to one of its most widely used safety stickers – a redesign of the decal applied to MEWPs to indicate where the auxiliary lowering controls are. Andrew Delahunt, IPAF's Director of Technical & Safety, urges dealers and distributors to apply the new decal, saying: "The design has been subtly improved and continues to be aligned to international safety standards."

IPAF continues to extend its range of Andy Access safety posters, including for the first time specific MCWP-related advice, pictured. IPAF members can also now customise the posters by adding their own company logo.



JUNE

MAJOR CONSTRUCTION PROJECTS DRIVE DEMAND FOR PAL CARDS

In Denmark, international contractor Mace insists that all powered access users hold a valid PAL Card. Mace's contract to build a data centre near Odense leads to Riwal opening a new Training Centre nearby, while other MEWP training centres also apply to become accredited by IPAF across Denmark and wider Scandinavia.

A similar rise in demand for IPAF PAL Cards is witnessed in Quebec, Canada, with operator training delivered by IPAF Members in French experiencing a surge in popularity following the introduction of new design, safe-use and training standards in Canada that became effective in May.

IPAF's North American *Elevating Safety* magazine is published and distributed with *Equipment Today* and *Rental* magazines to more than 150,000 readers.



JULY

IPAF LAUNCHES GLOBAL MEWP SAFETY FILM AT ASIA CONFERENCE

IPAF premieres a short film called *Choose Safety* warning people not to cut corners when using MEWPs to conduct temporary work at height at its Asia Conference & Showcase 2018 in Kuala Lumpur, Malaysia.

The film is also published on IPAF's YouTube channel, and aims to spread IPAF's MEWP safety and training message clearly and simply. It was developed by IPAF Malaysia members and screens to around 350 delegates at

the IPAF Asia Conference, the best-attended edition of the event to date.

In the Middle East, IPAF begins working with the Quality Conformity Council of Abu Dhabi to carry out proficiency testing for third-party MEWP inspection companies, offering ongoing support in the field of MEWP inspection in the region.

In the UK, the first in a series of special workshops aimed at helping rental company members pass the new mandatory IPAF Rental+ audits is hosted in Newcastle. In total, five of these workshops are held in the UK throughout 2018.



AUGUST

IPAF MILESTONES



NEW EVENTS IN THE UK AND THAILAND

Representatives from the UK Health & Safety Executive, CITB and Build UK are among the presenters in a seminar programme that attracts more than 200 delegates across a day of meetings, networking, dining and entertainment at the first ever IPAF Elevation in Coventry, UK. Andrew Muxslow of AFI Uplift is IPAF's Smooth Operator 2018 after completing the MEWP VR simulator challenge with the least faults closest to the ideal time; Mark Woolliscroft of Prolift Access is runner-up. Nationwide Platforms wins the IPAF training video award.

A save the date notice for next edition of the event is issued for 27 November 2019.

IPAF's first ever Thailand Seminar, to coincide with Intermat ASEAN in Bangkok, is also a success, attracting more than 60 attendees to hear a strong line-up of speakers give their presentations.

Tim Whiteman, CEO of IPAF, presents as part of a global webinar on Virtual Reality and its impact on working safely at height, hosted by US magazine *Engineering News-Record*.

SEPTEMBER



'IT'S EVOLVE OR DIE' KEYNOTE SPEAKER DON KENNY TELLS EUROPLATFORM

Adopting advanced technologies, embracing change, utilising and analysing big data and, most importantly, relying on a skilled and energised workforce are all key to building a successful and safe MEWP rental business, more than 150 delegates at Europlatform 2018 are told.

Don Kenny, CEO of Loxam Powered Access Division, pictured, tells the conference at the Europa Hotel in Belfast, Northern Ireland: "It's evolve and survive or stagnate and die".

Meanwhile, Stéphane Hubert, Chief Sales Officer for Haulotte, signs an agreement with IPAF CEO Tim Whiteman at the event, pictured, which makes Haulotte the first MEWP manufacturer to become a sustaining member of IPAF.

In the US, the first ever IPAF Innovate is held at the Houston Area Safety Council in Pasadena, Texas. The collaborative format sees small groups put together innovative solutions to some of the industry's most pressing challenges, with a number selected to be taken forward by IPAF across North America in the months and years ahead.



OCTOBER

IPAF GUIDANCE TO AID ANSI COMPLIANCE

With updated US standards to become effective in December 2019, guidance for companies or individuals seeking to become compliant with the new North American standards is published by IPAF, explaining how CSA/ANSI standards affect manufacturers, dealers, owners and users of MEWPs. Tony Groat, IPAF's North American Regional Manager, pictured, sat on the drafting committees for both the CSA and ANSI standards.

In the UK, IPAF runs final testing on the systems required to allow training centres to add a holographic CSCS logo to IPAF PAL Cards for those operators successfully passing their training and an approved CITB online health & safety check. ID with CSCS logo is a condition of entry to many BuildUK construction sites, so being able to apply it to the IPAF PAL Card from January 2019 will benefit many operators, demonstrators and delivery drivers of MEWPs and MCWPs in the UK.

A dedicated professional development seminar (PDS) for IPAF MCWP instructors is hosted at IPAF's head office in Cumbria, UK, pictured.



NOVEMBER

EXPO2020 WILL REQUIRE PAL CARDS, IPAF MIDDLE EAST CONVENTION TOLD

Robert Munn, Health & Safety Director of the Expo 2020 construction project, tells the fourth and best-attended IPAF Middle East Convention that "everyone using a MEWP at Expo 2020 Dubai must have a PAL Card from IPAF". Among other speakers, Dr Rehab Faraj Al Ameri, Director of National Accreditation Systems for ENAS at the Emirate Authority for Standardisation and Metrology (ESMA), pictured, talks about creating a better record of accidents,

and Jason Anker, pictured, paralysed from the waist down in a fall from a ladder on a construction site 25 years ago and now a global advocate of health and safety, gives a presentation about safety while working at height.

In Shanghai, IPAF also presents at the International Rental Conference and mans a very well attended stand at a busy bauma China 2018 event.

IPAF signs a memorandum of understanding with the occupational Health, Safety & Sustainability Association of India (OHSSAI) at the OSH India event in Mumbai.



FINANCIAL SUMMARY 2018



IPAF had a strong year in 2018, growing across the board in terms of membership, training delivery, turnover and territories covered. IPAF reversed its 2017 deficit through efficiencies and cost controls, leading to increased revenues, which were up 8.5% year-on-year. Enhanced income from events and a 5.8% increase in training revenue, including significant growth in countries where IPAF previously delivered little or no training, all contributed to the turnaround. Contractors requiring PAL Cards on major projects were behind significant rises in demand for IPAF training in the Nordic and Middle East regions.

IPAF's turnover in 2018 increased to £6.53 million (approximately €7.45m or US\$8.39m), representing growth of around 8.5% compared with 2017. In 2018, revenue from outside the UK surpassed 40% of total income for the first time, reaching 40.7% – an increase from 38.7% in 2017. Growth in revenues delivered a surplus of £200,220 in the year, a significant turnaround. This produced an operating surplus of 3.1% in the year, which led to a substantial strengthening in balance sheet assets, net assets now amounting to more than £1.48m, 15.6% higher than 2017. The way IPAF approaches events played a part in the turnaround, with revenue from events worldwide 28.7% over budget.

While membership only increased by 1% to stand at 1,335 at the end of the year, 57 new Training Centres joined IPAF, bringing the total at the end of 2018 to 531 across 47 territories, an increase of 5.6% on 2017.

IPAF-accredited programmes continue to generate significant business for those members who offer training courses, contributing £4.63m to the overall turnover of IPAF in 2018, 4.3% up on 2017. The number of people undertaking IPAF training rose again during 2018, with 165,787 people successfully completing a course, a marginal increase on 2017, when the figure was 164,662. Once again, many regions enjoyed substantial year-on-year growth including the Middle East, which went from 1,671 PAL Cards issued to almost 6,000 PAL Cards in just three years.

The International Powered Access Federation (IPAF) is a registered Society under the UK's Co-operative and Community Benefit Societies Act 2014, regulated by the UK Financial Conduct Authority. The Act came into force on 1 August 2014 and supersedes the Industrial and Provident Societies Act 1965. IPAF operates as a not-for-profit organisation, which is obliged to re-invest all surpluses in furthering the aims of the organisation

as defined by the members. The accounts are audited by CLB Coopers Chartered Accountants and are presented at the Annual General Meeting for approval.

Key performance indicators

More than 130 new members joined IPAF

IPAF achieved record annual turnover of £6.53m

Revenue from events increased by 26%

Training in 'developing/new' regions grew 16.2%

Training in these regions generated £470,000+

Total income from these regions was circa £1m

Growth in membership

IRELAND	48%
NORDIC REGION	10%
ITALY	7.5%
WORLDWIDE	1%



ELEVATE UPDATE

IPAF's Empowering Learning through Efficient Value Added Team Engagement (ELEVATE) initiative provides a platform to enable staff to share and contribute ideas to increase efficiency, standards and communication for the benefit of all employees, members and the wider access industry. Introduced at the end of 2016, it encourages performance, engagement and better ways of working through continuous improvement.

Four additional members of IPAF staff – Katrin Blau, Matt Brereton, Chris Greenbank and Paul Roddis – undertook Lean Academy training at IPAF's ELEVATE partner Unipart Rail early in 2018, and in doing so became ELEVATE Champions. IPAF had six ELEVATE Champions at the end of 2018, with Kate Miller and Natalie Wood remaining from the original trio; Rachael Halhead having left IPAF earlier in the year.

ELEVATE is made up of three key elements; Visual Management, Creative Problem Solving and Standard Work. Almost 20 creative problem-solving workshops took place in 2018, with 14 reaching the implementation stage, and six moving into the sustainment phase. Successes include the introduction of recycling facilities in the UK office, a new phone system and checklists to

improve member communications. A standard work project on IPAF's stock management system has been completed, with a new visual management board put in place to help manage the process and ensure deadlines are met.

A review of the IPAF membership process is also ongoing, with the improved process expected to improve the member experience of joining IPAF and to streamline administrative tasks internally. These initiatives have combined in helping IPAF to strengthen its financial position during 2018, through streamlined processes and improved cost control measures.



IPAF MEMBERSHIP

All individual IPAF members named as of end of December 2018. See current list at ipaf.org

ALGERIA
Renault Algérie Production www.groupe.renault.com
ARGENTINA
Haulotte Argentina www.haulotte.com IMG Rental S.R.L. www.imgrental.com.ar Renault Santa Isabel www.group.renault.com RENTANDO www.biscaynerent.com Stogue Srl www.stogue.com.ar Sullair Argentina, S.A. www.sullairargentina.com Worklift SA www.worklift.com.ar
AUSTRALIA
Briteway Australia Pty Ltd www.briteway.com.au
EWP Training Solutions www.ewptrainingsolutions.com.au EWP A Inc www.ewpa.com.au TVH Australasia PTY LTD www.tvh.com.au
AUSTRIA
Boels Maschinenverleih Österreich GmbH www.boelstraining.at Cramo GmbH & Co KG www.cramo.at Dorn Lift GmbH www.dornlift.com Felbermayr Transport- und Hebeteknik GmbH & CoKG www.felbermayr.cc FLOTT Arbeitsbühnen GmbH www.flott.cc Kögl GmbH www.koegl.at Lorenz Lift www.lorenzlift.at Mayer & Schöftner Arbeitsbühnen GmbH www.mayer-schoeftner.at W. Reitinger GmbH, Arbeitsbühnen & Mobilkrane www.w-reitinger.at
BAHRAIN
MMETC (Modern,Mechanical,Electrical&Transport Co.WLL) www.mmetc.com Sarens Nass Middle East WLL www.sarensnass.com Snorkel Middle East www.snorkelifts.com
BELGIUM
Allift Michielsens NV www.allift.be DK Rental NV www.dkrental.be Hermans Hefftrucks BVBA www.hermans-hefftrucks.be LODAX - Pads & Mats www.todax.eu Loxam SA, Belgium www.loxam.be TVH Parts Holding NV www.tvh.com Vertimac BVBA www.vertimac.com Wim Verhuur BVBA www.wimverhuur.be
BRAZIL
Alcance Locação e Comercio de Maquinas Ltda www.alcancebr.com.br Altoplat Plataformas Aéreas Ltda
ASL Manutenção Eletromecânica e Serviços www.aslmanutencao.com.br Aura Brasil Máquinas e Equipamentos Ltda www.aurabrasil.com.br CESARIO'S TREINAMENTOS & CONSULTORIA www.cesariostreinamentos.com.br Colombari - Roland Robert www.rqualifica.com.br DAC MANUTENÇÕES INDUSTRIAS

De Oliveira Celestino - Alexandre
Degraus Andaimes Maquinas e Quip. p/Construção Civil Ltda www.degraus.com.br Eleva Brasil soluções em elevação S/A www.elevabr.com.br Equipamentos Dcon Ltda www.dcombrasil.com.br Força 1 Locações de Maquinas e Equipamentos Ltda www.forca1locacoes.com.br Haulotte Do Brasil Ltda www.haulotte.com.br JLG Latino Americana www.jlg.com L C Monteli - Corretora De Seguros Ltda www.monteliseguros.com.br LASS Máquinas e Equipamentos Ltda www.lass.com.br Manitou Brasil Manipulação de Cargas Ltda www.manitou-group.com Maxrental Locadora De Equipamentos Ltda www.maxrental.com.br MILLS Rental, Mills Estruturas e Serviços de Engenharia S.A www.mills.com.br MOTORMAC - Distribuidora Meridional de Motores Cummins, S/A www.motormac.com.br ORGUEL LOCAÇÃO DE EQUIPAMENTOS S/A www.grupoorguel.com.br RCB Locações de Equipamentos e Máquinas Ltda www.rcbplataformas.com.br Renault - Curitiba Plant www.group.renault.com Rental Master Locação De Máquinas E Equipamentos Ltda-ME www.rentalmaster.com.br RENTALSUL LOCAÇÕES LTDA. www.rentalsul.com.br RIWAL do Brasil Locações De Equipamentos Ltda www.riwal.com Rodrigues Barbosa & Barbosa Ltda
Rosa Rentals www.rosarentals.com.br SK Rental Locação De Equipamentos Ltda www.skrental.com.br Skyjack Brasil www.skyjack.com Socage do Brasil Ltda www.socage.com.br Solaris Equipamentos e Serviços Ltda www.solarisbrasil.com.br Soma Locadora de Equipamentos Eireli – ME. www.somarental.com.br Terex Latin America www.terex.com.br TRIMAK ENGENHARIA e COMÉRCIO LTDA www.trimak.com.br TVH do Brasil www.tvh.com.br W Rental Locadora de Equipamentos Ltda www.wrental.com.br

BULGARIA
STROYRENT EOOD www.stroyrent.bg
CANADA
Acces Location Inc www.acceslocation.com AGF Access Inc www.groupeagf.com/en Delta-Q Technologies Corp. www.delta-q.com Farquhar - Larry J, All Lift Truck Training www.alllifttrucktraining.ca GRAVI-T ZERO International inc. www.gravitzero.com Hydro Mobile Inc www.hydro-mobile.com Jarnet Contracting Ltd www.jarnetcontracting.ca Leavitt Machinery www.leavittmachinery.com Location Ideal C.H. Ltee www.locationideal.com Ocean Work Cranes Inc www.oceanworkcranes.com Palfinger North America www.palfinger-northamerica.com Serious Labs, Inc. www.seriouslabs.com Skyjack Inc www.skyjack.com SOS Location CA www.soslocation.ca ZTR Control Systems www.ztr.com
CHILE
ALO Training Ltda, Alo Group www.alotraining.com CEOP - Centro De Entrenamiento De Operadores Profesionales www.ceoptraining.com Grupo Vertikal Spa/VERTITEK www.vertitek.cl Haulotte Chile www.haulotte-chile.com Renault www.group.renault.com SK RENTAL S.A. www.skrental.cl

CHINA
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IPAF SUSTAINING MEMBERSHIP

IPAF announced a new kind of membership category in 2018, with two companies signing up to become the first ever Sustaining Members.

Global MEWP manufacturer Haulotte joined APEX brand of global powered access events, as the first IPAF Sustaining Members.

The idea behind IPAF Sustaining Membership is that firms support

and sustain the work that IPAF does around the world to promote the safe and effective use of powered access; committing financially to assist IPAF and its staff achieve its long-term goals.

Tim Whiteman, CEO of IPAF, signed the new membership agreement with Stéphane Hubert, Chief Sales Officer for Haulotte, at Europlatform in Belfast, Northern Ireland, pictured. www.ipaf.org/join



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PJH Verhuur BV www.pjhverhuur.nl
Pot Hoogwerkers Rental BV www.pot-hoogveeen.nl
PortLinq www.portpeople.nl

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Riwal www.riwal.com
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van Dommelen - Eddy www.nihop.nl
van Gameren - Hans www.hans-hoogwerksystemen.nl
Vereniging Van Steiger-, Hoogwerk- En Betonbekistingsbedrijven (VSB) www.vsb-online.nl
V-Tas BV www.v-tas.nl
Wouter de Boer, Height Safety Expert www.heightsafetyexpert.com

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Transgrua – Transportes, Representações e Aluguer de Equipamentos, S.A. www.transgrua.pt
Transporel - Sociedade Unipessoal, Lda www.transporel.pt

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Doha Industrial Safety Services, Training www.diss.com.qa
Doha Petroleum Construction Co Ltd, (Rapid - Qatar) www.rapidaccess-gulf.com

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Swiss Logistics Academy AG, Ausbildungszentrum für Logistik www.sulsergroup.ch

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RMT Access Ltd www.rmtaccessservices.co.uk
Robinson - Graham
Rogers - Gary
Rose Access Solutions Ltd www.roseaccess.co.uk
RS Industrial Services Ltd www.rsis.co.uk
RSC Training Ltd www.rsc-training.co.uk
Russell - Ray www.access-training.co.uk
Rye - Nigel
Safe T Reach Ltd www.safe-t-reach.co.uk
Safe Training Services (Southern) Ltd www.safetrainingservices.co.uk
Safetymen Ltd www.safetymen.co.uk
Sandham - Paul, C/O UK Safety Training & Consultancy Ltd www.psat.co.uk
Sapphire Signs Ltd www.sapphiresigns.co.uk
SAT Services Training Ltd www.satservices.org
Saunders - Ian
Select Plant Hire Company Ltd www.selectplanthire.com
Severfield UK Ltd www.severfield.com
Shakespeare - Michael Keith, Loyal Training Services Limited
Shear Training & Consultancy Ltd www.sheartraining.co.uk
Shropshire County Trainers Ltd www.sctcentre.com
Sibbald Ltd www.sibbaldrtraining.com
SIM Training Services Ltd
Simian Risk Management Ltd www.simian-skill.com
Skipper TM Ltd www.skippertm.com
Skipton Hire Centre Ltd T/A SHC Hire Centres www.shc.co.uk
Sky High Access Ltd www.skyhigh.org.uk
Sky Platform Hire Ltd www.skyplatforms.co.uk
Skyjack UK Ltd (Skyjack Europe) www.skyjack.com
Skyking Limited www.skyking.co.uk
Skyline Hire Ltd www.skylinehire.co.uk

Small - Antony

Smart Platform Rental Ltd
www.smartplatforms.co.uk

Smith - Chris, Access Training

Smith - David Brian

Smith - Mark Anthony

Smiths Equipment Hire
www.smithsequipmenthire.com

Snorkel
www.snorkellifts.com

South East Powerline Services Ltd
www.seps.uk.com

Southern Cranes & Access Ltd
www.southerncranes.co.uk

SpanSet Ltd
www.spanset.co.uk

Speedy Support Services Ltd
www.speedyservices.com

Star Platforms Ltd
www.starplatforms.co.uk

Stockley - Jonathan

Stoner - Richard, Broadland Access Training Ltd

Strachan - Andrew

Strand Facilities Services Ltd
www.strandgroup.im

Streetlights
www.streetlights.co.uk

Summit Platforms Ltd
www.summitplatforms.co.uk

Sutton - Andrew

SWAT Access Ltd
0844 809 9198

Symonds - Mark

System People Ltd, t/a SP Training
www.sptraining.uk.com

System Training
www.system-training.com

Tacklestore Limited T/A SafetyLiftinGear.com, T/A Safety LiftinGear.com
www.safetyliftinggear.com

TALA Training Ltd
www.talatraining.co.uk

Taylor Training Services (UK) Ltd
www.taylor-training.co.uk

TCA Lifting Limited
www.tcalifting.com

The Safety Maintenance Company Ltd
www.thesmcl.co.uk

Thompson - Andrew George

TIME - Versalift
www.versalift.co.uk

Total Electrical Ltd
www.totalelectricaltd.co.uk

Total Hire & Sales
www.totalhireandsales.co.uk

Towable Access
www.towableaccess.co.uk

Tower Hire (Services) Ltd
www.towerhireservices.co.uk

Tracked Access Platforms Ltd
www.trackedaccessplatforms.com

Tracked Spider Solutions
www.trackedspidersolutions.co.uk

Training-4-Safety
www.training-4-safety.co.uk

TrainingPlus.Com Ltd
www.trainingplus.com

Trainrite Ltd
www.trainriteuk.co.uk

Treacher - David

Turner Access Ltd
www.turner-access.co.uk

Turner Tool Hire Ltd
www.turneraccesshire.com

TVH UK Ltd
www.tvh-uk.co.uk

Tyne & Wear Access NE Ltd
www.tyneandwearaccess.co.uk

UK Cross Hire Limited

UK Platforms Ltd
www.ukplatforms.co.uk

UK Power Networks
www.ukpowernetworks.co.uk

UK Tool Hire Ltd T/A UK Powered Access
www.ukindustriesttraining.co.uk

Universal Training Services (Midlands) Ltd
www.uetraining.co.uk

Up & Out Platforms
www.upandoutplatforms.co.uk

Upward Powered Access Ltd
www.upwardpoweredaccess.com

Venthen - Roger, Consultant Advent Services

Vertikal Press Ltd
www.vertikal.net

Waldron - Neil, C/o Approved Access Training

Walker - Scott

Walsh - Stephen, T/A Hy-Acc Services
www.hyaccservices.co.uk

Warren Access Huntingdon Ltd
www.warrenaccessstraining.co.uk

Warren Access Ltd
www.warrenaccessstraining.co.uk

Watling JCB Ltd
www.watling-jcb.com

Webb - Mike
www.hydraulicgenerators.co.uk

Werner UK Sales & Distribution Ltd
www.bossacesstowers.com/uk

Weston Handling Consultancy Ltd
<https://whctd.com>

White - Phillip Michael

Wilcock - John Edward

Williams - William David

Willsher - David James

Wood Group Industrial Services Ltd
www.woodgroup-isl.com

Woodhead - Paul

Workplatform Ltd
www.workplatformtd.co.uk

Wraith - Martin, C/o CTS

Wright - Martin Charles Gerrard

Wright - Robert McKinnon

Yardbourne Ltd t/a Powered Access Services
www.poweredaccessservices.co.uk

Your Equipment Properties Ltd
WWW.yourequmentsolutions.co.uk

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8a Consulting and Training Services, Cuautemoc Ochoa
8atrainng.com/

Admar Supply Co Inc
www.admarsupply.com

Alimak Hek, Inc
www.alimakhek.com

All Access Equipment LLC
www.allaccessequipment.com

Allied Insurance Brokers
www.alliedinsbrokers.com

Alpha Platforms, (SSP Group Inc)
www.alphaplatforms.com

AMP Sales and Services LLC
www.ampservicesllc.com

Area Work Platform Inspection, Inc.

BAE Systems, U.S. Combat System
www.baesystems.com

Blade Platforms LLC
www.bladeplatforms.com

Bollens - Chris
www.phoenixpensacola.com

Bronto Skylift Inc
www.brontoskylift.com

Butler County Area Vocational-Technical School
www.bcvr.tec.pa.us/

Construction Safety Council
www.buildsafe.org

Control Dynamics Inc
www.cdmw.com

Custom Equipment, Inc
www.hybridlifts.com

DICA Marketing Inc
www.dicausa.com

Don Maq Inc
www.donmaq.com

Donald Lombardi
www.lombardimasonry.com

Eckstine & Associates, Inc

Foresight Intelligence
<https://foresightintelligence.com>

Global Machinery Group (GMG)
www.globalmachineryinc.com

Haulotte US
www.haulotte-usa.com

Heartland Communications Group, Inc., (Lift And Access)
www.liftandaccess.com

Heath and Associates
www.heathandassociates.com

Hoj Engineering & Sales Co
www.hoj.net

inspire Inc.
www.inspirerental.com

Institute For Aerial Lift Safety
www.aerialliftsafety.org

JCB Inc
www.jcbna.com

JLG Industries, Inc
www.jlg.com

KHL Group Americas
www.khl.com

Lizzy Lift
www.lizylift.com

Mastclimbers LLC
www.mastclimbers.com

MEC - Aerial Work Platforms
www.mecAWP.com

Niftylift Inc
www.niftylift.com/usa

O&G Industries Inc.
www.ogind.com

One Source Equipment Rentals, Inc, Corporate Offices
www.onesourcerental.com

Operating Engineers Local 324 JATF
www.benesysinc.com/benefit/oe324jatl

Operating Engineers, Local 150 Apprenticeship
www.asiplocal150.org

ReachMaster Inc
www.reachmaster.com

Scaffold and Access Industry Association
www.scaffold.org

Service One Access, Inc.
www.serviceoneaccess.com

Sheet Metal Workers #33 Cleveland JATC

Sheet Metal Workers Local 137 JATC, Signage
www.info@local137.com

Sheet Metal Workers Local 73 Chicago
www.jatc73.org

Sheet Metal Workers Local Union 1 & Central IL, Chapter of SMACNA, Inc
www.smw1.com

Sheet Metal Workers Union Local 33 - Toledo area
www.smwlu33.org

SmartEquip, Inc
www.smartequip.com

Snorkel USA
www.snorkellifts.com

Sunbelt Rentals Inc, Corporate Headquarters
www.sunbeltrentals.com

Technology International Co.
www.tic-global.com

Terex AWP
www.genieindustries.com

Teupen North America
www.teupen-usa.com

The Horton Group
www.thehortongroup.com

Toyota Material Handling, USA Inc
www.toyotaforklift.com

Trackunit Inc
www.trackunit.com

Trojan Battery Company LLC, USA
www.trojanbattery.com

Tutus Drop Prevention
www.tutusdropprevention.com

TVH Parts Co
www.tvhamerica.com

United Rentals Inc, Corporate Headquarters
www.unitedrentals.com

Universal Equipment Inc
www.universalequipment.net

Valcourt Exterior Building Services of NJ, LLC
www.valcourt.net

URUGUAY

ATENKO
www.atenko.com.uy

RAMIREZ
www.ramirez.com.uy

TecnoAndamio - Nizepel SA
www.tecnoandamio.cl

VIETNAM

Tuyet Nga Co Ltd
www.tuyetnga.com.vn

U-Mac Vietnam Co Ltd
www.umac.com.vn

ZAMBIA

Boogart Technical Ltd
www.btech.co.zm

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John Barker 1983 - 1986

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Leigh Sparrow 1997 - 1999

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Pierre Saubot 2004 - 2006

Andrew Reid 2006 - 2008

John Ball 2008 - 2010

Steve Shaughnessy 2010 - 2011

Wayne Lawson 2011 - 2013

Steve Couling 2013 - 2015

Andy Studdert 2015 - 2017

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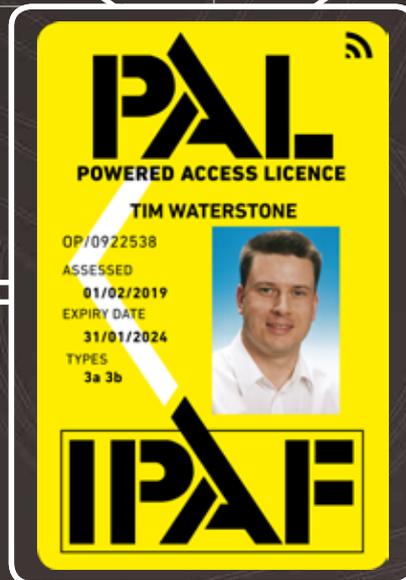
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✓ Annually updated course content based on feedback from instructors and trainees

✓ Global database of all valid PAL Card holders

✓ Complies with legal requirements



✓ Training delivered by highly qualified instructors

✓ Focus on safety & efficiency

✓ Online verification of PAL Cards:
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✓ Over 30 years of industry experience

✓ Smart technology & fraud protected

✓ Comprehensive range of training courses

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The IPAF Powered Access Licence or PAL Card is recognised worldwide across industries as proof of platform operator training to the highest standard. It is issued by the International Powered Access Federation (IPAF) to platform operators who successfully complete a training course and pass a test at an IPAF-approved training centre. Ask for the PAL Card as proof of operator training!

Find your nearest IPAF approved training centre at www.ipaf.org

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