

FIFTH EUROPEAN MEETING OF EMPLOYEE OWNERSHIP

BRUSSELS 16, 17, 18 JUNE 2005



GOOD PRACTICES IN EMPLOYEE OWNERSHIP EDUCATION AND TRAINING

EMPLOYEE OWNERSHIP LEARNING & EDUCATION
EUROPEAN EOLE PROGRAMME



EUROPEAN FEDERATION OF EMPLOYEE SHARE OWNERSHIP

EOLE CONFERENCE

EUROPEAN CONFERENCE ON EMPLOYEE OWNERSHIP LEARNING & EDUCATION

The Fifth European Meeting of Employee Ownership will be a major event, gathering 350 people from more than 20 countries.

To be fully successful, employee ownership and financial participation need education and training. A lot of communication, training and education programmes already exist for employee ownership and financial participation, but all this information had still to be collected and analysed. This was the first goal for EOLE – the European Programme for Employee Ownership and Education, with the help of companies, organisations and social partners, educational and training organisations.

This way, EOLE was able to set up a database with all information about existing education and training programmes, across the world. EOLE is now going to define common European specifications, which will make things easier for companies, for educational bodies and for social partners at country level.

This conference offers exceptional opportunities for the participants to share experiences, learn and improve practices and, at the same time, offers an important promotion of Employee Share Ownership aimed at the political, economic and social world.

Over the three days, this will be the main place for meeting and interacting with employee owners, companies, researchers, practitioners, consultants, representatives of organisations and unions and other persons interested in participating in the promotion and development of Employee Share Ownership.



THURSDAY 16 JUNE 2005 PRESENTATIONS AND ROUND TABLES GOOD PRACTICES IN EMPLOYEE OWNERSHIP EDUCATION AND TRAINING

AUDITORIUM OF THE NATIONAL BANK OF BELGIUM
RUE MONTAGNE AUX HERBES POTAGÈRES 61, 1000 BRUSSELS

MORNING SESSION

9.30 – 10.00 Welcome and registration

10.00 – 10.45 Conference opening and welcome speeches

To be fully successful, employee ownership and financial participation of workers need training and education. It is an integral part of the Lisbon Strategy.

- Stéphane Ouaki will represent Mr Vladimir Spidla, European Commissioner
- Members of the European Parliament, Catherine Stihler, Ieke van den Burg and others*
- Marc Mathieu, Secretary General of EFES

10.45 – 11.30 Good practices in employee ownership training and education. EOLE Programme and database.

EOLE database gathers some 150 training and education programmes. It gives a good picture of the development of employee ownership in the world and what are the real needs in respect of training and education.

- Marc Mathieu, Head Manager of EOLE Programme

11.30 – 12.15 New evidence on employee ownership and corporate performance

Joseph Blasi and Douglas Kruse are known for their research on employee ownership and corporate performance. They are now in the final months of completing the surveys of a new multi-year research. Coincidentally, some main American organisations have now set up the "Committee for Effective Employee Ownership" with a list of ten principles.

- Douglas Kruse*, Rutgers University – New Jersey

12.15 – 13.00 Employee ownership education in major European groups.

Many European groups have made significant developments in employee share ownership since the late nineties. Over the years, employee share owners have experienced dramatic stock market fluctuations.

With the participation of:

- Michael Masset, Share-based Plans Manager, Dexia Group
- other major European groups

13.00 - 14.30 Lunch

AFTERNOON SESSION

14.30 – 16.00 Employee ownership training and education in the USA

Five main organisations are supporting employee ownership development and education in the USA. Round table with the Heads of all five main American organisations in the field.

- Michael J. Keeling, President of the ESOP Association
- Corey Rosen, Executive Director of the National Center for Employee Ownership (NCEO)
- John Logue, Director of the Ohio Employee Ownership Center (OEOC)
- David Binns*, Associate Director of the Beyster Institute for Entrepreneurial Employee Ownership
- Chris Mackin, President of Ownership Associates, Inc.

16.00 – 16.15 Coffee break

16.15 – 17.30 Employee ownership training and education in Spain

EOLE database shows clearly that Spain is the most active country after the USA, regarding employee ownership training and education. Round table with representatives of the three main Spanish organisations in the field.

- Fred Freundlich, Professor, Mondragon Universidad
- Mikel Lezamiz*, Executive Director, Mondragon Otoralora
- Miguel Millana, President of the Spanish Confederation of Employee-Owned Companies (CONFESAL)
- A representative of the Spanish Confederation of Workers Co-operatives (COCETA)

17.30 – 18.00 Tullis Russell Group's business game for employee ownership education

Tullis Russell Group is well known as the result of an employee buyout in a successful Scottish leading papermaking and converting group. They are now a wholly employee owned company, with some 1.200 employees. For their employee owners' education, they developed a specialised business game.

- Geoff Miller, Company Secretary and Secretary to the Share Schemes of Tullis Russell Group

Evening Visit and evening dinner to the Belgian Center of Comic Books

(from 19.00) Rue des Sables 20, 1000 - Brussels



FRIDAY 17 JUNE 2005 PRESENTATIONS AND WORKSHOPS
GOOD PRACTICES IN EMPLOYEE OWNERSHIP
EDUCATION AND TRAINING
AUDITORIUM OF THE NATIONAL BANK OF BELGIUM

MORNING SESSION

9.30 – 10.15 Employee ownership training for corporate governance in France.

The French Corporate Governance Institute has developed a dedicated branch and training for employee share ownership.

- Pierre-Yves Gomez, Executive Director of the French Corporate Governance Institute

10.15 – 11.00 Employee ownership training for co-operatives in UK.

The Co-operative College has specialised training programmes for employee ownership in the UK.

- Mervyn Wilson, Chief Executive of the Co-operative College.

11.00 – 11.30 Coffee break

in parallel:

11.30 – 13.00 Workshop 1: Training and education for employee buyouts.

Employee buyouts are a typical situation for employee ownership. Many organisations across the world are developing assistance and specialized consultancy. Round table with representatives of some main organisations for employee buyouts.

- David Erdal, Executive Director, Baxi Partnership (UK)
- Javier San José, Training Coordinator, ASLE - Basque Federation of Employee-Owned Companies (sociedades laborales)
- Dan Bell, Program Coordinator of the Ohio Employee Ownership Center (OEOC)
- Erkki Kangas, Executive Director, Sataosaajat Osuuskunta (Finland),
- Anthony Jensen, Executive Director, Ithaca Business Strategies (Australia)
- Volkmar Hanf *, Executive Director, Arbeitsgemeinschaft Partnerschaft in der Wirtschaft (Germany)

Workshop 2: Presentation by Monidee Finance

Monidee Finance is a Netherlands company which developed an open, flexible and web-enabled software – tOption - dedicated to the management of employee share and option plans. In addition to tOption, Monidee Services provides additional services right up to the whole outsourcing of the management and administration of share and option plans. These additional services, combined with the flexibility of tOption, gives every company – be it a multinational or non-stock exchange quoted company or a SME – a suitable, efficient and cost-effective tool to manage employee benefits.

- Hans Van Tol, CEO, Monidee Finance BV
- Paul Arens, Monidee Finance BV

Workshop 3: Presentation by Dexia Employee Benefits

Dexia Bank is a leading European group, encouraging employee share ownership for its own development as well as for its customers. Dexia describes itself as "the bank for sustainable development".

- Ludovic Wolff, Managing Director of Dexia Employee Benefits, Dexia Group

13.00 – 14.30 Lunch

www.eole-efes.net
the European website
for EO Learning & Education

www.efesonline.org
the european employee
ownership website

PRACTICAL INFORMATION

VENUE

EUROPEAN MEETING, 16 and 17 June:

Auditorium of the National Bank of Belgium
Address: Rue Montagne aux Herbes Potagères 61, 1000 Brussels
Phone: +32 2 221 36 36 - Fax: +32 2 221 32 54
Website: www.nbb.be

EVENING TO THE BELGIAN CENTER OF COMIC BOOKS, 16 June:

Address: Rue des Sables 20, 1000 Brussels
Phone: +32 2 219 19 80 - Fax: +32 2 219 23 76
Website: www.comicscenter.net

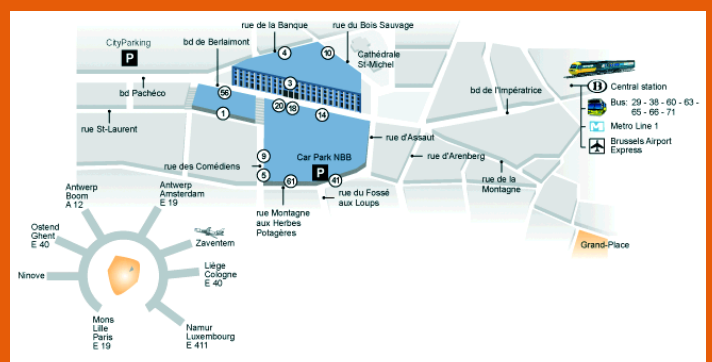
MEETINGS FOR EXPERTS AND EFES MEMBERS, 18 June:

EFES Office Center
Address: Avenue Voltaire 135, 1000 Brussels
Phone: +32 2 242 64 30

CONTRIBUTION TOWARDS COSTS

150 € (+ 50 € if dinner at the Belgian Center of Comic Books)

The participation includes the meetings, handouts and proceedings, refreshments and lunches.



AFTERNOON SESSION

in parallel:

14.30 – 15.45 Workshop 4: Employee Ownership training and education: common challenges – identical solutions?

This workshop will include a specific presentation about Germany, with presentations on Mitbestimmung compared to employee ownership (Mitbestimmung und Mitarbeiterbeteiligung), the German speakers being:

- Michael Lezius, Executive Director, AGP – Arbeitsgemeinschaft Partnerschaft in der Wirtschaft
- Heinrich Beyer, Director, MLP Finanzdienstleistung AG

Workshop 5: A solution to encourage learning institutions and other bodies to develop Employee Ownership training and education?

Given the indications of the EOLE Programme, how encourage training and education bodies to organize programmes for employee ownership, at country level?

Workshop 6: Presentation by ING Bank

ING is a leading European financial group, encouraging employee financial participation schemes for its customers, SMEs and big corporations as well.

- Françoise Platteborse, Head Manager of ING Employee Benefits

15.45 – 17.15 Round table of education professionals. Reports of the workshops and conclusions.

- Ryszard Stocki, Professor, Jagiellonian University Krakow
- Gorm Winther, Professor, Greenland University
- Erik Maaloe, Professor, Aarhus Business School
- John Logue, Professor, Kent State University
- Erik Poutsma, Professor, University of Nijmegen
- Virginie Pérotin, Professor, University of Leeds

17.15 – 17.30 Closing session

With the support of: European Commission – Employment & Social Affairs; Brussels-Capital Region; Dexia Employee Benefits; Monidee Finance; Hewlett-Packard; KMO-PME Magazine; ING



Employee Benefits



SATURDAY 18 JUNE 2005 MEETINGS FOR EXPERTS AND EFES MEMBERS THE STRATEGY FOR PROMOTING EMPLOYEE OWNERSHIP IN EUROPE

EFES OFFICE CENTER - AVENUE VOLTAIRE 135, 1030 BRUSSELS

9.15 – 9.30 Welcome and registration

The meeting is organised at EFES Office Center, Avenue Voltaire 135, 1030 Brussels

9.30 – 15.30 Meeting and lunch

* to be confirmed

IN DEMONSTRATION DURING THE CONFERENCE

Thanks to Hewlett-Packard Belgium, a set of computers will be at participants' disposal with some meaningful demonstrations:

- **CORPORATIA**, interactive training game of the French Corporate Governance Institute
- **TULLIS RUSSELL GROUP's** business game for employee ownership training
- **EOLE DATABASE** giving information on Employee Ownership learning & education programmes across the world
- **DEXIA**, presentation of Dexia Employee Benefits' services
- **MONIDEE FINANCE SOFTWARE tOption**, probably the best web-enabled software in the world for the management of employee ownership plans
- **INTERACTIVE INTRODUCTION TO ESOPs**, by the National Center for Employee Ownership
- **ING**, presentation of ING Employee Benefits' offer

LANGUAGES

English, Spanish, French, German.

ORGANIZATION/REGISTRATION

Marc Mathieu, Secretary General, EFES – EUROPEAN FEDERATION OF EMPLOYEE SHARE OWNERSHIP

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Phone/Fax: +32 2 242 64 30

Email: marcmathieu@marcmathieu.be

Websites: www.efesonline.org - www.eole-efes.net

www.societades-laborales.net - www.actionnariat-salarie.be

ACCOMMODATION

All reservations will be done exclusively by EFES Secretariat – Myriam Biot.

Both hotels are 2 minutes from the conference hall, on foot.

Hotel NH GRAND PLACE ARENBERG

Address: Rue d'Assaut 15, 1000 Brussels

Phone: +32 2 501 16 16 - Fax: +32 2 501 18 18

Email: nhgrandplacearenberg@nh-hotels.com

URL: <http://www.nh-hotels.com>

Conditions: 125 € (single, night + breakfast)

Hotel NH ATLANTA

Address: Boulevard Adolphe Max 7, 1000 Brussels

Phone: +32 2 217 01 20 - Fax: +32 2 217 37 58

Email: nhatlanta@nh-hotels.com

URL: <http://www.nh-hotels.com>

Conditions: 125 € (single, night + breakfast)

LOGISTICS/SECRETARIAT

For any help or information, contact :

Myriam Biot, Rue de la Mutualité 25-27, B-1190 Bruxelles.

Phone: +32 2 343 67 50 - Mobile : +32 475 95 30 30.

Email: m.biot@sifra.org

REGISTRATION FORM

(one form by participant please)

Please return to: EFES, Avenue Voltaire 135, B-1030 Brussels

Fax: +32 2 242 64 30 or Email: marcmathieu@marcmathieu.be

1. Participant (fill in block capital letters)

Mr/Mrs/Ms	First name	_____
Last name		_____
Position		_____
Company/Organization		_____
Address		_____
Zip Code	City	_____
Country		_____
Fax	Phone	_____
Email		_____

2. Participation dates (tick your choices)

I shall attend on these dates:

- Thursday 16 June. Meeting and roundtables.
- Thursday 16 June. Evening and dinner
at the Belgian Center of Comic Books.
- Friday 17 June. Meeting and workshops.
- Saturday 18 June. Meetings for EFES members only.

3. Workshops participation

I would like to take part in the following workshops
on 17 June (you can tick several choices):

- Workshop 1: Training and education for employee buyouts
- Workshop 2: Monidee Finance software
- Workshop 3: Dexia Employee Benefits
- Workshop 4: Common challenges – identical solutions?
- Workshop 5: Encourage learning institutions?
- Workshop 6: Presentation by ING Bank

4. Contribution towards costs

- I pay my contribution of 150 €
(+ 50 € if dinner at the Belgian Center of Comic Books)

5. EFES membership

I wish to become a member of EFES and pay my basis membership
fee:

- As an individual, 50 €
- As a company or organization, 500 €

6. Payment

- By bank transfer to account number
IBAN: BE51 7320 0420 1262 (or 732-0042012-62)
of EFES to CBC BANK in Brussels (BIC : CREGBEBB)
mentioning "EOLE conference + your name and surname"
- By card, MasterCard or Visa,
nr _____ Expiration on _____

- Send me a justifying invoice

Date: _____ Signature: _____

