

**DEFINING EUROPEAN EDUCATION AND LEARNING
PROGRAMMES, FRAMEWORK AND SPECIFICATIONS FOR
EMPLOYEE SHARE OWNERSHIP AND PARTICIPATION
- EFES 2004-2005 -**

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EFES AND THE PROJECT

PRESENTATION OF EFES

■ Mission of EFES

EFES' objective is to act as the European umbrella organization of employee owners and all persons, companies, trade unions, experts, researchers, institutions, all those people who are looking to promote employee ownership and participation in Europe. The European Federation is developing, with the contribution of experts, legal specialists and economists. It is setting up a European centre for information, meeting, training, advice, representation and lobbying to serve its members. It also organises many events and meetings in Europe to promote and develop the participation of employee owners.

■ EFES and the European Commission

EFES is recognised by the European Commission EFES as a European Business Representative Organization.

A recent survey showed that **EFES represented some 117,500 enterprises employing 6,750,000 workers in the European Union**, including the acceding countries.

■ Origin and goals of the EFES

The idea of a European federation and international co-operation was borne at the First European meeting of Employed Shareholders in Brussels on 8 May 1998, where 248 participants from 28 countries agreed to create the EUROPEAN FEDERATION OF EMPLOYED SHAREHOLDERS FOR EMPLOYEE OWNERSHIP AND PARTICIPATION (EFES).

One of EFES's foremost aims is to make employee shareholders' voices heard in the social and political dialogue at European level. Employed shareholders, as neither just employees nor just shareholders but co-entrepreneurs, are taking on a new voice and seeking to make it heard at its rightful level: they are the new social partners. They have a new and important contribution to make to debate and policy on the objectives of growth, competitiveness and employment in Europe.

EFES prioritised the set-up of an international information exchange platform on employee share ownership. Based on the EFES' network of members and partners, the Internet site <http://www.efesonline.org> is the key interface between them. The Third European meeting on employee ownership, held in April 1999, in The Haag, dealt specifically with those issues.

Finally, the international conference on employee share ownership held in Brussels on 23

November 2001 under the auspices of the Belgian presidency of the European Union, contributed significantly to raising awareness of Employee Share Ownership benefits and stakes among Member States and social partners.

■ EFES' Current Status

The EFES gathers organizations, companies, trade unions, experts, researchers, and institutions. Its network of contacts covers both the EU and candidate countries. Furthermore, the EFES has established a partnership with similar organizations in other regions of the world (especially in the United-States, in Australia, and Asia).

The EFES' current membership is 150, of which 80 are organizations and 60 are individuals.

In Europe, EFES members and partners are representative organisations and individuals :

- Practically all the existing advocacy organizations, associations, and national federations in the field of employee ownership in Europe;
- High –profile companies;
- Unions and representatives of employee organizations (CISL, CFTC, CGT, CGSLB, etc.);
- Experts and specialised consultants;
- Virtually all the researchers and academic centres working in this field.

EFES's Internet site <http://www.efesonline.org> is frequently extended and updated. It is the link between all the employee share ownership organizations all over Europe. The web site informs of good practices and legal developments in each country. It also works as a forum hosting debates and exchange of ideas.

Thus, the Internet-based activities and exchanges have given birth to an employee share ownership European community. This community constitutes a centre of attraction for members who learn how to better know each other and intensify accordingly their collaboration.

Beyond the boundaries of the European Union, EFES has been actively promoting employee share ownership in the Eastern and Central European countries, where a network has been created.

Finally, the EFES is at a global level, the principal European component of the Capital Ownership Group (COG), a think-tank gathering actors of employee share ownership all over the world.

The EFES and the COG have implemented a close partnership that principally lies in the symbiosis of their respective web sites. Therefore it may again be referred to as an employee share ownership community and hence a global community.

PROJECT PRESENTATION

■ PROJECT'S OBJECTIVES

The project is an outcome of the Fourth European Meeting of Employee Share Ownership, held in Bilbao – Spain in November 2002, and represents one of the new priorities of the federation for coming years. The participants to the meeting highlighted the importance of education and training programmes in promoting and developing the financial participation in Europe.

During the debates and after a dedicated workshop, it became clear that the education and learning initiatives should be integrated into a coherent framework and part of European strategy. In this way, the resulting education programmes will have the desired impact on European-wide development of financial participation and of employee share ownership.

Several debates on this issue took place among participants from more than 10 countries, during a dedicated workshop and the plenary session. In Annexe 3, the report of this workshop is presented. It was decided that the European Federation of Employee Share Ownership - EFES would propose and co-ordinate a project to define the European framework of education and learning programmes for employee share ownership.

This project intends to:

- **Identify existing national and European initiatives** and programmes in Employee Share Ownership education and training;
- **Present an overview** of existing national and European programmes in this field;
- Make a comparative analysis of **national and European needs** in this field;
- Evaluate case-studies and **propose models** based on best practices
- **Define a European framework** and specifications for Employee Share Ownership education and training programmes;
- **Organize a European conference** to present the results of the project, the best practices and the proposed framework;
- Create an **Internet based public domain** for effective dissemination and as a platform for continuous improvement in this field
- **Publish and disseminate information** on the European framework and specifications education and training programmes to further mobilise and develop national and European initiatives;
- Foster European co-operation, exchanges and research by promoting the creation of **specific networks** in education and training field.

The project is in line with the Commission's actions plan for promoting wider dissemination of financial participation as indicated in the Communication from the Commission (COM (2002) 364 final).

Establishing common specifications for employee share ownership education and training paves the way for initiatives of states and social partners.

PROJECT TIME FRAME AND ACTIVITIES PLAN

The project time frame is of 12 months.

It consists of the following main activities:

- Identification of international and national experts and other contacts and propose a working group of experts, their roles and responsibilities.
- Organisation of a Kick-off -meeting in September 2004, gathering experts and consultants in this field, in order to define the research regions and working methodology. Agreement on tasks and responsibilities.
- On -going coordination of the research, analyse of the work-in-progress made by the regional experts.
- Organisation of the second meeting, Workshop in Brussels with the national experts in April 2005, in order to present key findings and results per country, synthesis of the common features, selection of examples of best practices and case studies, selection of possible models in Europe.
- Definition of a European level programmes: contents, levels and specifications.
- Definition of the European Framework and specifications.
- Creation of a database of programmes, trainers, experts, case studies and best practices.
- Creation of an Internet public domain with relevant information, to facilitate further development and research.
- Organization of an European-wide conference in June 2005 to present the results of the project and the best practices in this field, and the proposed framework: 120 participants from 28 EU and accessing countries.
- Publish and disseminate information through multiple communication channels about the proposed European framework and specifications.

These activities will facilitate the building of Europe-wide network, as thought by the Commission in the last Communication on the Financial Participation. In this way the information exchanges, analysis and research in the field will be put on a permanent footing.

By creating and proposing a European framework and specifications for Employee Share Ownership education and training programmes, the project aims to make a contribution to a future steering policy action in Europe in this field.

PROJECT'S PHASES

1. Preparation Phase

From September 1st, to September 30 - 2004

- a. Project management and communication strategy
- b. Kick-off Meeting in September: research and working methodology; partners' role and responsibility , research region
- c. Internet-based communication among the partners of the project, exchanges and e-Meetings

2. Implementation Phase

from October 1, 2004, to May 31st , 2005

- a. Research activities by the regional experts: from October 1st 2004 to January 31st 2005
- b. e-Meeting in January 31st, 2005: analyse of key findings and results per country. Selection of examples of best practices and case studies
- c. Synthesis of research results in February 1 to 28th 2005: Synthesis of the common features. Selection of possible European models
- d. Framework definition in March-April 2005. Workshop of the Working Group , on April 15: European level programmes, types, specifications and main modules
- e. Internet-based communication among the partners of the project, exchanges and e-Meetings
- f. On-going project management and work-in-progress evaluation.

3. Follow-up Phase

From June 1st 2005 to August 31st 2005

- a. Database and reports creation
- b. Internet public domain creation
- c. Organization of an European-wide conference in June 2005, to present the results of the project, the best practices in this field and the proposed framework
- d. Exchanges and creation of specific national networks
- e. Multiple channels of information dissemination
- f. Internet-based communication among the partners of the project, exchanges and e-Meetings
- g. On-going project management and work-in-progress evaluation.
- h. Final report and project evaluation.

PREPARATION PHASE

The first phase takes place during the first month, from September 1st to 30, 2004.

Aim: bringing together the necessary expertise and resources to define the methodology, partners' roles and work plan of Employee Share Ownership education and training project.

Objectives: Through Internet-based communication among the partners of the project, exchanges and e-Meetings, and the Working Group Workshop, the experts from the countries partners discuss, clarify and agree on the following **activities and outputs**:

- Project's Working Group creation (six Regional Projects experts and the European Project Leader)
- Research and working methodology
- Project budget break-down per phases
- Main activities and their time schedule
- Participants' roles and responsibilities, work load/partner
- Project management and communication strategy
- Evaluation of the results and of the work-in-progress
- Updates of the work plan and changes management

In order to carry out the project, a Working Group will be set up, composed of seven national experts and European experts.

They will meet face to face during a **Kick-off meeting for Working Group creation**, planned in the beginning of September 2004 in Brussels.

Main objective is to agree on the six Regional Projects experts and the European Project Leader. The Regional experts leaders are chosen among the participating experts and consultants in the field of education and training and Employee Share Ownership.

- The **Annexe 2** presents the **list of the experts and their main achievements** in the field of Financial participation, Employee Share Ownership, European programmes, education and training and transnational project management.

The specific **purposes of the meeting** are:

- To propose and to agree on a research methodology;
- To draft the questionnaire for collection of data;
- Decide on the main types of sources of information
- To define criteria for best practice examples;
- To propose and agree on a communication structure.

At the end of the meeting, the participants will agree on the persons in charge with the research activity for one or several of the 25 EU countries, composing the six pre-defined regions: Nordic, Western, Southern, Central, Eastern European and candidate countries.

IMPLEMENTATION PHASE

The implementation phase takes place from October 1st 2004 to May 31st 2005.

An important part of this phase consists in research activities in order to define the national situation of ESO education in each of the European Union and accessing countries. The outputs are the analysis of key findings and results per country, countries' specific needs and the proposal of examples of best practices and case studies as European models.

On-going project results analysis and work-in-progress evaluation by the European project leader will be combined with periodic e-meetings and frequent informal discussions among the participating experts.

■ **Main activities and outputs of the Implementation phase are:**

- **Research** - Analyse existing situation: from October 1st 2004 to December 31st 2004
- **E-Meeting** in the end of December 2004: First results benchmarking
- **Synthesis** of research results from January 1st, 2005 to February 28th 2005
- **E-meeting**, end of February 2005: Selection of possible European models
- **Definition of European framework and specifications:** March 1st to May 31st 2005
- **Research Workshop of the Working Group:** at mid-April 2005: Agreement on European education programmes levels, specifications and framework
- **On going Internet-based communication** among the partners of the project, exchanges
- **Monthly progress evaluation and work co-ordination** and e-Meetings

■ **RESEARCH SUB-PHASE**

The overall aim of the research sub-phase is to identify initiatives and programmes from each country and to prepare the ground for a common approach at European level on coherent framework and European programme specifications.

This phase takes place from **October 1st 2004 to December 31st 2004**

The research phase will build on the knowledge and expertise of the designed national experts and on the specific enquiries carried out at national level, using the questionnaire designed during the first e-Meeting.

The research phase consists in the following **main activities**:

- Distribute the questionnaire for collection of data at all relevant levels and sources of information
- Identify initiatives and programmes from across Europe
- Identify needs per country and per level
- Criteria definition, the link between education and training and development of participative management:
- Identify best practice examples
- Proposals for examples and best cases to serve as possible models in Europe.
- On going Internet-based communication / exchanges among the project's partners

- Monthly co-ordination e-Meetings.

Outputs:

1. Key aspects per country
 - Existing programmes
 - Experts and consultants and institutions
 - Initiatives
2. Key needs per country and per level:
 - Training the employee / Business Literacy programmes
 - Training the managers and promoters of Employee Share Ownership initiatives
 - MBA Programmes for the future managers of ESO-based companies
 - E-learning initiatives.

■ **THE SYNTHESIS SUB-PHASE**

The overall aim of the synthesis phase is to produce a comprehensive summary of the initiatives and programmes being developed at national levels.

This phase takes place from **January 1st, 2005 to February 28th 2005**.

The synthesis will be an important element in proposing a coherent framework to develop co-operation and further development of education and training for Employee Share Ownership.

Outputs:

1. Overview of European Employee Share Ownership education and training in the context of different national systems;
2. Strengths and weaknesses of different programmes and initiatives;
3. Overview of best examples and case-studies
4. Synthesis of the needs in each country;
5. Choice of the examples to be proposed as European models

■ **THE DEFINITION SUB-PHASE**

The aim of this sub-phase is to agree and define the structure and specifications for Employee Share Ownership education and training programmes.

It takes place between March 1st and May 30, 2005.

1. Selection of best examples and case-studies to serve as possible models in Europe
2. Definition of specifications for different levels and target groups
3. **Workshop for the Working Group, in April 2005** to define and agree on 'European Programmes levels, types, specifications
4. **Main Output: the definition of European framework for European Employee Share Ownership education and training programme** that can be used by European institutions and by national concerned actors for future actions and as base for co-operation and development in the area.

FOLLOW-UP PHASE

This phase is scheduled from May 1st 2005 to August 31st 2005

Main activities:

- **Communication** – publishing **the project's results**
- Multiple channels information **dissemination**
- **European Education Conference organisation**
- Creation of specific **national networks** on education and training
- **On going Internet-based communication** and exchanges among the partners of the project,
- Monthly co-ordination e-Meetings.

The main outputs:

- **Education Database and reports creation**
- **Internet public domain creation**
- **Organization of a European-wide Conference** in June 2005, to present the results of the project, the best practices in this field and the proposed framework
- Exchanges and creation of **specific education networks**
- **Final report** and project evaluation.

■ Dissemination

For the success of every project as well as to assure sustainability and multiply effect it is very important to organize good dissemination.

We plan to organise a **two-days European Conference in June 2005**, in Brussels. It will gather some 120 participants from most of the 25 European countries, companies, trade unions, experts, researchers, institutions, employee owners, EU representatives, looking to promote employee ownership and participation in Europe.

The conference's agenda (**In Annexe 3 – Preliminary Conference Agenda**) will be focusing on the following topics:

- ❑ Europe's agenda for Entrepreneurship and the role of the education and learning
- ❑ ESO Education and learning in Europe: Project's research results
- ❑ Project Selection - Best practices: EFES members experiences
- ❑ Towards a European ESO Education Framework and Certification
- ❑ Unions' point of view: Roundtable
- ❑ Workshop 1: ESO Education: Common challenges - identical solutions?
- ❑ Workshop 2: EFES Certification: A solution to encourage learning institutions to develop ESO courses?

ON-GOING ACTIVITIES

■ On-going Communication and intensive use of New Technologies of Information and Communication

During the duration of the whole project, EFES' Internet site <http://www.efesonline.org> will be a corner stone of the project.

A new specific section will be created and dedicated to this project. The web site will be constantly updated in order to allow dissemination of information and the assessment and co-ordination of the work-in-progress.

The participants will participate to periodic e-meetings to exchange information and experience.

■ Project Management, Monitoring and Evaluation

The European project leader and the Regional project co-ordinator will be constantly assessing progress in each country, through call-conference, e-Meetings or by face-to-face meetings.

Overall, the project will promote and facilitate the effective use of information and communication technologies.

■ Project Participants

The project is carried out by national and European experts as well as by national and European organisations. They are all active members of the EFES - EUROPEAN FEDERATION OF EMPLOYEE SHARE OWNERSHIP.

PROJECT SCHEDULE

Main activities	Sept 2004	Oct 2004	Nov 2004	Dec 2004	Jan 2005	Feb 2005	Mar 2005	Apr 2005	May 2005	Jun 2005	Jul 2005	Aug 2005
PRELIMINARY PHASE												
Working Group Meeting												
Research Methodology												
Definition of Work plan, Roles & responsibilities												
IMPLEMENTATION PHASE												
Research Sub-Phase												
Synthesis Sub-Phase												
Definition Sub-Phase												
Working Group Meeting												
FOLLOW-UP PHASE												
Communication & Publishing & Internet Site												
Dissemination at national and European levels												
European Education Conference												
Specific Networks creation												
Final report and Evaluation												
ALL PHASES ON-GOING ACTIVITIES												
Communication, NTIC, eMeetings												
Project Management												

EXPECTED RESULTS

■ OVERALL EXPECTED RESULT

By producing a comprehensive summary of the initiatives and programmes being developed at national levels, and proposing an European programme specifications, the project will palliate the lack of research or analysis on Employee Share Ownership education and training programmes and initiatives in the EU Member States.

The project will put the basis of a European framework for Employee Share Ownership education and training programmes.

■ MAIN EXPECTED RESULTS

The project will:

1. Provide an overview and a comparative analysis of Employee Share Ownership education and training situation in the EU countries, Poland, Hungary and Slovenia;
2. Build a database of existing initiative programmes, trainers, experts, case-studies;
3. Identify training and education needs on different levels:
 - Employee training / Business Literacy Education;
 - Management training;
 - Employee Financial Participation MBA;
 - E-learning.
4. Generate a public domain information on Internet;
5. Create new specific networks, national and European, by developing exchanges of information and experience, as well as research, in this area;
6. Proposals for European training and education programmes contents and specifications.

INNOVATIVE ELEMENTS & ADDED-VALUE OF THE ACTION

The project is completely **innovative**:

- **By producing a comprehensive summary** of the initiatives and programmes being developed at national levels, **proposing an European programme specifications**, the project will palliate the lack of research or analysis on Employee Share Ownership education and training programmes and initiatives in the EU Member States.
- Although education and training programmes are being developed at different levels in many countries, there is neither a communication nor a synergy between them. The project will make **a contribution to European collaboration and exchanges of best practices in Employee Share Ownership education and training**.
- These activities will facilitate the building of Europe-wide network, as thought by the Commission in the last Communication on the Financial Participation, so that **information exchanges, analysis and research in the area of education and training can be put on a permanent footing**.

The project proposed by EFES and its partners has the following **added value aspects**:

- The overview and a comparative analysis of Employee Share Ownership education and training situation in European countries will provide the basis for future action in the field;
- The project will facilitate the building of Europe-wide network in Employee Share Ownership training and education, and the exchanges of information and experience.
- It will define the content and specifications of Employee Share Ownership Training and Education Programmes as a part of a European coherent framework.
- The project has as ambition to put the basis of further development in the area: a European certification of Employee Share Ownership programmes and trainers.

CONCLUSION

This work aims to put the basis of a European framework for co-operation and development in the area, and of a European Employee Share Ownership education and training programme, that can be used by European institutions and by all the concerned actors for their future activities.

Through all activities and expected results, the project has the ambition to make a contribution to a future steering policy action in Europe in field of employee share ownership and participation.

ANNEXE 1

PROJECT PARTNERS - ORGANIZATIONS & INDIVIDUALS

The following organizations and persons are all members of the Board of Directors of the federation. They are at the origin of this project and, in their double capacity of members of EFES Board of Directors and project partners, are actively involved in the project preparation and management.

1. ASSOCIATION DES ACTIONNAIRES SALARIES D'ING, represented by Pierre VANRIJKEL, Director, Diestsesteenweg 437, 3300 TIENEN, **BELGIUM**
2. KSLP – CZECH SOCIETY FOR SELF MANAGING ENTERPRISE, Zdenek SREIN, director, Wuchterlova 16, 160 00 PRAHA, **CZECH REPUBLIC**
3. Gorm WINTHER, professor of economy, member of AGIO PARTNERS, Tranumparken 20, 9220 AALBORG 0, **DENMARK**
4. FORUM OF FINNISH PERSONAL FUNDS, represented by Teemu LUUKKA, Employees Fund of Sanoma Corporation, Helsinki Sanomat, 00020 HELSINKI, **FINLAND**
5. FEDERATION FRANCAISE DES ASSOCIATIONS D'ACTIONNAIRES SALARIES, represented by Jean-Claude MOTHIE, President, THALES, Boulevard Haussmann 173, 75008 PARIS, **France**
6. SHARE PARTICIPATION FOUNDATION, represented by Janos LUKACS, Director, Vajda Peter Utca 43/B II/25, 1089 BUDAPEST, **HUNGARY**
7. MRP – HUNGARIAN ASSOCIATION OF EMPLOYEE OWNERSHIP, represented by Janos SZANTAI, Director, Angol Utca 42, 1149 BUDAPEST, **HUNGARY**
8. FIADA - FEDERATION ITALIENNE DES ASSOCIATIONS D'ACTIONNAIRES SALARIES, represented by Fabrizio GARBERI, Secretary of FABI – UNION OF BANK AND FINANCIAL SECTOR, Via Recanate 2, 20124 MILANO, **ITALY**
9. CISL – CONFEDERAZIONE ITALIANA DA SINDICATA LIBRE, represented by Pier Paolo BARETTA, Secretary National, Via Po 21, 00198 ROMA, **ITALY**
10. NEDERLANDS PARTICIPATIE INSTITUUT, represented by Henk KOOL, Director,

Hartogstraat 13, 2514 EP 'S-GRAVENHAGE, **NETHERLANDS**

11. POLISH EMPLOYEE OWNERS ASSOCIATION UNIA WLASNOSCI PRACOWNICZEJ, Jacek LIPINSKI, President, Al. Jerozolimskie 30 P.24, 00-024 VARSOVIE, POLAND
12. DEZAP - SLOVENIAN EMPLOYEE OWNERSHIP ASSOCIATION, represented by Zvone ZUPAN, President, Mladosti 2 POB 45, 3322 VELENJE, **SLOVENIA**
13. DRUSTVO DELNICAR, represented by Gojko STANIC, Vice-Président, Professor of economy, Trzaska 132, 1000 LJUBLJANA, **SLOVENIA**
14. CONFESAL – CONFEDERATION ESPAGNOLE DES SOCIEDADES LABORALES, represented by Javier San José Barriocanal, Director, ASLE, 48009 BILBAO, **SPAIN**
15. MONDRAGON CORPORACION COOPERATIVA, represented by Adrian CELAYA, Secretary General, Paseo Arizmendiarieta 5, 20500 MONDRAGON, **SPAIN**
16. CENTRE FOR EMPLOYEE OWNERSHIP & PARTICIPATION, David WHEATCROFT, Director, Abford House 15 Wilton Road, LONDON SW1V 1LT, **UNITED KINGDOM**
17. JOB OWNERSHIP LTD, represented by Ann TYLER, Director, Abford House 15 Wilton Road, LONDON SW1V 1LT, **UNITED KINGDOM**

ANNEXE 2

PROJECT'S EXPERTS

EFES is a militant organization and its members are committed to promoting and developing the participation of employee ownership and participation in Europe. All the experts involved in this project are members of EFES. In addition to EFES experts, some 5-6 other experts (to be decided) will be chosen for their direct involvement with social partners organizations or will be social partners representatives.

All selected experts and discussion leaders have an extensive experience of the ESO and participation, projects / educational programmes management, and training. Some of them have relevant experience in planning and implementing EO education and training projects.

Some of them are academics and international published authors.

Depending on their availability and specific involvement, six Regional Project Experts and one European Project Leader will be asked to be part of the Working Group.

1. Pierre VANRIJKEL, Director, ASSOCIATION DES ACTIONNAIRES SALARIES DE LA BBL, **BELGIUM**

Extensive experience in the banking sector, as manager at BBL - Bank Brussel Lambert and in employee share ownership and participation. Founder in 1992 of the ESO Association of BBL, Belgium. President for 2003-2004 of EFES.

2. Marc MATHIEU, Secretary General, EUROPEAN FEDERATION OF EMPLOYEE SHARE OWNERSHIP, **BELGIUM**

Extensive experience in banking and training sectors. Trainer in Asset Management since 1981, and in Participatory Management since 1974. Founder in 1992 of the ESO Association of BBL, Belgium. Founder of EFES in 1998. Secretary General of EFES.

3. Angelica L. BUCUR, Managing Director ARTENVIE , **BELGIUM**

Expert in evaluation of European Education projects for DG Education & Culture. Co-ordinated and promoted Project Management training and PMI European certification at the University Leonard de Vinci, Paris. MBA and MD's in Economic Sciences – Planning and Economic Cybernetics, founder of ARTENVIE asbl. Mentor for women managers and business-women.

4. Véronique HACHE, Financial Communication Manager, Groupe SUEZ, **BELGIQUE**

Co-ordinator of Suez Education Programme ' Shareholders' Business School', in collaboration with ICHEC – Institut Catholique des hautes Etudes Commerciales and EHSAL. The 1year programme offers to Suez share owners employees and other Suez share holders the possibility to acquire the knowledge to better manage their portfolio and understand and exercise their employee share owners rights.

5. José Maria ALGORA, Director, CECOP - CONFEDERATION EUROPEENNE DES COOPERATIVES DE PRODUCTION ET DU TRAVAIL ASSOCIE, **BELGIUM** . As representative of CECOP, he brings the valuable experience of co-operatives management and of education and training programmes for co-operatives members.
6. Myriam BIOT, Director CULTURES PLURIELLES, **BELGIUM**
Extensive experience of + 20 years in communications. Director of several European networks. Founder of SIFRA Micro-Credit Networking Facilitators, aiming to promote the access to the labour market of the poor and the economic integration of women in the Mediterranean countries
7. Zdenek SREIN, Director KSLP – CZECH SOCIETY FOR SELF MANAGING ENTERPRISE, **CZECH REPUBLIC**.
Experience in entrepreneurship and training. Trainer in self-management, provides useful lessons and principles for those interested in studying or starting new enterprises.
8. Gurli JACOBSEN, Trainer, LANDS ORGANISATIONEN TRADE UNION, **DENMARK**
Project Manager with experience in designing, organizing and running training courses for the main trade union in Denmark.
9. Gorm WINTHER, AGIO PARTNERS, professor of economics, **DENMARK**
Professor, speaker and author, he has written extensively about the development of employee ownership through continuous learning, making ownership meaningful for the members.
10. Erik MAALOE, Professor at AARHUS SCHOOL OF BUSINESS, **DENMARK**
Professor and renowned author, he has written extensively about the development of employee ownership in large and small companies in divers sectors of activity. He has provided objective observations on how participatory ownership has developed over time these companies.
11. Teemu LUUKKA, Secretary FORUM OF FINNISH PERSONAL FUNDS, **FINLAND**
Secretary General of Employees Fund of Sanoma Corporation, with extensive experience in employee ownership, management and finance.
12. Jean-Claude MOTHIE, THALES GROUP, President of FEDERATION FRANCAISE DES ASSOCIATIONS D'ACTIONNAIRES SALARIES - FAS, **FRANCE**
President of FAS, he is representing a federation with 40.000 members, corporate and individual. A third of the industrial employees shareholders are represented. Publish the Guide for Employees Share Owners, issued yearly in French, Spanish and German.
Co-ordinates the research in education and training programmes for employees shareowners.
13. Agnès FOURCADE, Director, CREDIT LYONNAIS, Executive director of FEDERATION FRANCAISE DES ASSOCIATIONS D'ACTIONNAIRES SALARIES, **FRANCE**
Director of Communication at the Bank Crédit Lyonnais. Contributions to Guide for Employees Share Owners, issued yearly in French, Spanish and German.
Co-ordinates the FAS research in education and training programmes for employees shareowners.
14. Vincent DUTFOY, Director, CREDIT LYONNAIS, FEDERATION FRANCAISE DES ASSOCIATIONS D'ACTIONNAIRES SALARIES, **FRANCE**
Manager at Bank Crédit Lyonnais and founder of the Association of Employee Share Owners at Crédit Lyonnais. Extensive experience in the field of financial participation. Co-ordinates the FAS research in education and training programmes for employee shareowners.
15. Patrick GUIOL, Professor - UNIVERSITE DE RENNES, **FRANCE**

Professor and Research Director at CNRS – French National Centre for Research, has been involved in employee share owners and participation since 1965.

16. Janos LUKACS, Director, SHARE PARTICIPATION FOUNDATION, **HUNGARY**
Managed Training programmes for creating ESOPs. Developed training oriented to managers : involvement, empowerment. Developed several training courses oriented to employees: Business literacy, Games, Models for creating own company.

17. Janos SZANTAI, Director, MRP, **HUNGARY**
Secretary General of HUNGARIAN ASSOCIATION OF EMPLOYEE OWNERSHIP, he has extensive experience in the field of financial participation.

18. Pier Paolo BARETTA Secretary National, CISL – CONFEDERAZIONE ITALIANA DA SINDICATA LIBRE, **ITALY**

Extensive experience in promotion of employee ownership and participation, and of initiatives and programmes of education and training for employees.

19. Fabrizio GARBERI, Secretary of FABI – UNION OF BANK AND FINANCIAL SECTOR, representative of FIADA - FEDERATION ITALIENNE DES ASSOCIATIONS D'ACTIONNAIRES SALARIES, **ITALY**

Extensive experience in the fields of financial participation and banking.

20. Robin POPPE, DIRECTOR, INTERNATIONAL TRAINING CENTRE OF ILO, **ITALY**
Head of the Sectoral Programmes Group, working on the definition of contents and target groups for ESO training initiative.

21. Eric POUTSMA, Professor, UNIVERSITY OF NIJMEGEN , **NETHERLANDS**
PhD, Associate Professor at Nijmegen Business School, where he holds a chair in Labour Relations. He currently teaches organisational theory, team management, and innovation management. His researches include participation and entrepreneurship, on which he published extensively. He also conducted several research projects for the European Commission, including the PEPPER II report on the promotion of employee financial participation.

22. Henk KOOL, Director, NEDERLANDS PARTICIPATIE INSTITUUT, **NETHERLANDS**
Director of the Dutch Participatory Institute since 1999, prestigious speaker at employee share owners and financial participation conferences.

23. Jacek LIPINSKI, Founder and President, POLISH EMPLOYEE OWNERS ASSOCIATION UNIA WLASNOSCI PRACOWNICZEJ, **POLAND**

Trade-union member (Solidarity), engaged in employee self-management. Co-author of the Act of Privatisation of state-owned enterprises and of Act on pension funds. Author of a book on 'Employee-owned companies in the light of research of the Polish Ownership Association and the Institute of Political Studies'.

24. Krzysztof LUDWINIAK, Director, POLISH EMPLOYEE OWNERS ASSOCIATION UNIA WLASNOSCI PRACOWNICZEJ, **POLAND**

Extensive experience in ESO based-companies in California (15 years), currently Director of Polish Ownership Association.

25. Tomasz BOGACZ, POLISH EMPLOYEE OWNERS ASSOCIATION UNIA WLASNOSCI PRACOWNICZEJ, **POLAND**

Extensive experience in participatory and self-management currently member of Polish Ownership Association.

26. Ryszard STOCKI, Professor, **POLAND**

Experience in Business Literacy Training. Research on the needs of Management literacy for EO companies. Research in the use of new technologies and E-learning for education.

27. Zvone ZUPAN, President, DEZAP - SLOVENIAN EMPLOYEE OWNERSHIP ASSOCIATION, **SLOVENIA**

Since 1995, Chief Executive Officer of an ESO –based company. Experience in education programmes for managers.

28. Gojko STANIC, Vice-President, DRUSTVO DELNICAR, **SLOVENIA**

Professor of economy and author of 'The Partnered Joint Stock Company' related to the process of privatisation in the Republic of Slovenia. Extensive experience and researches in the field of employee participation and industrial democracy.

29. CONFESAL – CONFEDERATION ESPAGNOLE DES SOCIEDADES LABORALES, represented by Javier San José Barriocanal, Director, ASLE, Calle Ercilla 3, 48009 BILBAO, **SPAIN**

ASLE is the Education and Training Centre of the Confederation with many years of experience in programmes for both employees and managers.

30. Adrian CELAYA, Secretary General, MONDRAGON CORPORACION COOPERATIVA, **SPAIN**

The Co-operatives of Mondragon have built education and training programmes for employees and managers, as well as for the future managers (university).

31. David ERDAL, Director, JOB OWNERSHIP LTD, **UNITED KINGDOM**

Former executive director of Tullis Russels, famous EO company in Scotland. Significant experience in EO training, using business games.

32. Patrick DOLAN, JOB OWNERSHIP LTD, **UNITED KINGDOM**

Author of the manual 'How to manage EO companies?', translated in Romanian, Slovenian, Polish, Bulgarian.

Designed training courses for employees at a Steelworks Company: voluntary, on company's time, 10.000 employees have followed the programme.

33. Ann TYLER, Director, JOB OWNERSHIP LTD, **UNITED KINGDOM**

Currently Executive Director, she has extensive experience in employee ownership, education and training.

34. Hugh DONNELLY, Director, Employee Ownership SCOTLAND, **UNITED KINGDOM**

Director of an ESO company; organises training courses and management training.

37. David WHEATCROFT, Director, CENTRE FOR EMPLOYEE OWNERSHIP & PARTICIPATION, **UNITED KINGDOM**

Managing Director of an EO company, trade-union activist, specialised in Employee Ownership training, he is the author of several articles and brochures in the field.

ANNEXE 3

EFES EUROPEAN EDUCATION CONFERENCE 2005

" EUROPEAN EDUCATION AND LEARNING PROGRAMMES, FRAMEWORK AND SPECIFICATIONS, FOR EMPLOYEE SHARE OWNERSHIP AND PARTICIPATION "

Thursday, June 2005

- 9:30 - 10:00 **Conference Opening and Welcome Speeches**
Marc Mathieu, EFES Secretary General
- 10:00 – 10:30 **Keynote Speech**
Europe's agenda for Entrepreneurship and the role of the education and learning
EU representative – DG Employment
Luis-Miguel Parriza, European Economic and Social Committee
- 10:30 – 11:00 **ESO Education and learning in Europe: Project's research results**
▪ Overview of existing national and European initiatives and programmes:– Erik Poutsma, PhD, Associate Professor at Nijmegen Business School
- 11:00 – 11:15 **Coffee Break**
- 11:15 – 12:00 ▪ **Project Selection - Best practices: EFES members experiences**
France,
UK,
Belgium, Group Suez
the Netherlands.
- 12:00 – 13:00 **Questions and debate**
- 13:00 – 14:30 **Lunch**
- 14:30 – 16:00 **Towards a European ESO Education Framework and Certification**
▪ Organisational, sectoral and national needs: Project research results: EFES project leader
▪ Unions point of view: Roundtable: General Secretary of the European Unions Confederation, ...

16:00 – 17:00 **Questions and debate**

17:00 – 18:00 **Conclusions**

Friday , June 2005

- 9:30 - 11:00 **Project results dissemination and follow-up plans**
Workshop 1
- ESO Education: Common challenges - identical solutions?***
- EFES Education and learning priorities plan for 2005-2006
- 11:00 – 11:15 **Coffee Break**
- 11:15 – 13:00
 - Initiatives and plans for promoting or developing ESO Education courses: regional roundtables
- 13:00 - 14:30 **Lunch**
- 14:30 – 16:00 **Workshop 2**
- EFES Certification: A solution to encourage learning institutions to develop ESO courses?***
- EFES Certification of a Pool of experts
- 16:00 – 16:15 **Coffee Break**
- 16:15 – 17:30
 - **EFES' Certification of ESO Courses: Levels and Action plan**
 - ***Europe's agenda for entrepreneurship and the role of the ESO courses***
- 17:30 – 18:00 **Conclusions and Conference closure**