



Employee Ownership
Australia & New Zealand
Making it your business

EMPLOYEE OWNERSHIP AUSTRALIA LIMITED

ANNUAL REPORT

2011/2012

STATEMENT ON

EMPLOYEE OWNERSHIP AUSTRALIA LIMITED

Employee Ownership Australia Limited was formed in on 26 July 2011 as an Australian Public Company, Limited by Guarantee.

EOA's objectives are:

- to be the centre of excellence for companies seeking to implement or support employee share ownership or ESOPs;
- to be the voice on employee share ownership issues in Australia and New Zealand;
- to encourage research into the productivity impacts of employee ownership;
- to encourage government at all levels to develop taxation and other incentives to promote employee ownership; and
- to provide exceptional services to our members.

EOA is managed by a Board comprising of:

(Chair) Angela Perry	Global Head, EPS Business Development, Link Market Services Ltd
(Vice Chair) Elena Kirillova	Chairman, The Australian Employee Buyout Centre Ltd
Alan Greig	Director, Ownership Strategies, The Mercury Centre Cooperative Ltd
Jamie Anderson	CEO, Mastertek Pty Ltd
Peter Somerville	Vice President, ALAEA

Member Services include:

- Regular blogs that help demystify employee share ownership;
- Reduced rates for our extensive training programs;
- Reduced rates for the Annual Conference and Award's night;
- Free access to a network of like-minded people to exchange ideas, experience and practices;
- Access to experienced, specialist advisors for advice on tax, legal, ESOP finance matters and also access to like minded HR specialists, company secretaries, workplace relations professionals and employee representatives;

- To be an active voice in research and policy work that can be used to influence Government and other decision-makers;
- Access to our ESOP specialist accreditation program (currently in development);
- Free information and help line – expert guidance available to assist you with any employee ownership queries that are not of a legal or tax nature;
- Access to our international connections.

Further information on Employee Ownership Australia including how to join as a member is on the website at www.employeeownership.com.au

ACTIVITIES REPORT 2011/12

The 2011/12 year was an important one for the EOA with the implementation of a number of key initiatives that had been promised as a result of the AEOA strategic review. These included:

- running a number of training workshops on employee ownership throughout the year, including implementing employee ownership in New Zealand for Australian companies, ATO reporting and the John Lewis event with Peter Cox;
- creation of the inaugural annual conference and awards night, with the key note speaker for the event being Sir Stuart Hampson (former Chairman of John Lewis Partnerships);
- growing the membership to include companies with or the desire to have employee owned businesses, our membership in this area has more than doubled in 2012;
- the creation of an experts panel of specialists in this area that can be counted on to provide advice, drive the policy reform and thinking around employee ownership;
- engagement with key politicians interested in employee ownership;
- creation of a new member site that is interactive and provides useful topics for members to download or use, including training materials and videos. The website also is designed to increase public access to information on employee ownership. This activity involved a major expenditure on the part of EOA;
- creation of the EOA branding, new membership structure and new website this also included the creation and implementation of a social media strategy with regular blogs, tweets and a LinkedIn profile;
- the creation of the ambassador role and agreement by Sir Stuart Hampson and Gary Scarrabelotti to be the ambassadors of the group;
- presentation to the South African conference on employee ownership that was attended by leading UK and US experts
- alliances developed with other business organisations, academic institutions and other peak employee ownership organisation who are providing feedback on new research and other initiatives in the area of employee ownership .