



Business Plan for Semear: Investment Analysis

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Abstract

In a constantly changing world, addressing social inequalities, especially for people with disabilities who face social exclusion and job market barriers is crucial. In Portugal and globally, unemployment rates among people with disabilities are concerning, often leading to poverty. Reducing social barriers through vocational training and suitable employment opportunities is essential.

Founded in 2014, Semear aims to create sustainable initiatives supporting the active involvement of people with disabilities in society. Its programs enhance students' academic skills and social integration, promoting independence. Semear is currently seeking to expand its mission by creating a new campus, providing necessary conditions for students with disabilities all in one place.

This study analyzes the new campus project's feasibility, considering its costs and potential funding. After accessing the CAPEX requirements, we find the project is not currently viable due to financing constraints. The funding Semear receives is not sufficient to cover the expected expenditures for the project. To reach the needed investment amounts, Semear may continue its efforts and position itself to secure new partners and funders.

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Resumo

Num mundo em constante mudança, é fundamental combater as desigualdades sociais, especialmente no que respeita às pessoas com deficiência que enfrentam a exclusão social e as barreiras do mercado de trabalho. Em Portugal e a nível mundial, as taxas de desemprego das pessoas com deficiência são preocupantes, conduzindo frequentemente à pobreza. A redução das barreiras sociais através da formação profissional e de oportunidades de emprego adequadas é essencial.

Fundada em 2014, a Semear tem como objetivo criar iniciativas sustentáveis que apoiem o envolvimento ativo das pessoas com deficiência na sociedade. Os seus programas melhoram as competências académicas e a integração social dos alunos, promovendo a independência. A Semear procura atualmente expandir a sua missão através da criação de um novo campus, proporcionando as condições necessárias aos estudantes com deficiência num só local.

Este estudo analisa a viabilidade do projeto do novo campus, considerando os custos e o potencial financiamento. Depois de aceder aos requisitos CAPEX, concluímos que o projeto não é atualmente viável devido a restrições de financiamento. O financiamento que a Semear recebe não é suficiente para cobrir as despesas previstas para o projeto. Para atingir os montantes de investimento necessários, a Semear pode continuar os seus esforços e posicionar-se para garantir novos parceiros e financiadores.

Título: Plano de negócios para a Semear: Análise de Investimento

Autor: Francisco Demony

Palavras-chave: Deficiências intelectuais e de desenvolvimento, Desigualdades sociais, Ensino superior, CAPEX

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Abbreviations and Acronyms

- BIPP** – Banco de Informação de Pais para Pais
- BPF** – Banco Português de Fomento
- CAPEX** – Capital expenditures
- CEO** – Chief Executive Officer
- CCL** – Certificate in Contemporary Living
- COMPETE** – Programa Operacional Competitividade e Internacionalização
- CTP** – Comprehensive Transition and Postsecondary Program
- ESG** – Environmental, social, and corporate governance
- ESF** – European Social Fund
- FIS** – Fundo para a Inovação Social
- FP** – Fundación Prodis
- HEOA** – Higher Education Opportunity Act
- HEI** – Higher Education Institution
- IDD** – Intellectual or Developmental Disability
- ISEI** – Innovation and Social Entrepreneurship Initiative
- IEFP** – Instituto do Emprego e Formação Profissional
- ISA** – Instituto Superior de Agronomia
- NFQ** - National Framework of Qualifications
- NIDD** - National Intellectual Disability Database
- PIS** – Portugal Inovação Social
- PP**- Promentor Program
- SDG** – Sustainable Development Goals
- SE** – Social entrepreneurship
- SME** – Small and medium-sized enterprises
- TCPID** – Trinity College for People with Intellectual Disabilities
- TPSID** - Transition and Postsecondary Programs for Students with Intellectual Disabilities
- UN** – United Nations

UAM – Autonomous University of Madrid

US – United States

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1. Introduction

The inclusion of people with disabilities is a fundamental goal to promote a truly egalitarian and fair society. It represents a contemporary movement in harmony with the United Nations ESG and SDG frameworks, encompassing distinct objectives for individuals, businesses, and nations to fulfill. Individuals with disabilities bring valuable perspectives and talents to society. Embracing diversity and ensuring accessibility not only enriches our cultural fabric but also unlocks the unique potential of each person, fostering a more inclusive and vibrant community. This study fits into this context, relating to the full inclusion of all people with disabilities in Portuguese society. This research aims to assess the financial feasibility and economic sustainability of the Implementation of the Semear Campus, a project that focuses on educating and socially integrating students with intellectual disabilities to empower them.

The sustainable social inclusion program - Semear - was designed for young adults with intellectual and developmental disabilities, focusing on training and developing skills for employability and professional integration. This program encompasses not only training but also agricultural, production, and transformation systems, reinforcing learning and employment opportunities while ensuring the sustainability of the initiatives. The follow-up doesn't limit itself to the training but concludes with the full integration of the trainee into the job market.

Semear believes that inclusion is a collective effort, involving not only individuals with disabilities but also their families, businesses, public entities, educational agents, specialized professionals, and the general population. Collaboration and cooperation are crucial to transforming inclusion into a common benefit, creating a society without margins for phenomena such as indifference or social exclusion.

The history of this initiative began in 2005 when a group of parents of children with disabilities founded the BIPP - *Banco de Informação de Pais para Pais*. Since then, they have worked to provide information to society about the available resources in Portugal for people with disabilities, supporting families, educational agents, professionals, and the population at large, in seeking resources that meet individual needs and promote social inclusion.

Over the years, they evolved and expanded their efforts. In 2014, the Semear program was initiated. Strategic partnerships were established, including collaboration with the *Instituto Superior de Agronomia (ISA)*, giving rise to the Semear Academy.

Starting in 2016, inclusive business models and training courses for trainees with intellectual and developmental disabilities in the agri-food sector were created. In the following years, they expanded their network of partnerships, inaugurated units, and consolidated efforts to promote a society without margins for indifference or social exclusion. Semear sells part of its productions online to sustain the project. There is a "grocery store" where all kinds of products harvested from the land, baskets, and transformed products are sold, as well as a "ceramics store" dedicated to selling clay products, produced by students of the institution in practical classes, such as plates, trays, glasses, etc. Currently, they are financially sustainable, despite receiving support from the government. This is bolstered by the contribution of products created or produced in academia by the trainees. These products play a significant role in generating revenue, forming a significant percentage of their overall income. This approach not only ensures their independence from excessive reliance on government support but also highlights the practical and economic value of the training provided, as it translates into tangible products that contribute to the institution's financial health. At the moment, more than 50% of Semear's costs are covered by revenue from their social businesses.

Despite Semear's efforts, approximately 1.085.472 citizens in Portugal face daily challenges associated with disabilities, which can be motor, mental, auditory, or visual (2021 census data). It is alarming to observe that the unemployment rate among these people is six times higher than that of those without disabilities. The existence of social barriers, fueled by prejudices and a lack of knowledge about the competencies of these citizens, perpetuates this situation. Additionally, there is a scarcity of inclusive responses that promote this population's autonomy and active participation.

At the moment, Semear has a different and separated campus through Lisbon with several purposes. These spaces are not very close, and logistically it's not the best, as the students are not able to be everywhere to interact with all the stages that Semear offers. Considering this situation, Semear proposes creating a new, single campus dedicated to promoting the full inclusion of individuals with intellectual and developmental disabilities in society. This campus has as its pillars training, empowerment, and professional integration, aiming for personal, social, and financial autonomy for individuals with mental disabilities. Moreover, it will be a space for awareness and education for inclusion, involving various agents of society, such as families, teachers, students, and businesses. They will have proximity with each other, increase the number of students in Semear Academia, connect every part of the process, and therefore, make it easier to maintain and ensure consistent quality of education, programs, and services.

This campus would offer a consultancy and training center for educators, families, and businesses. It will also provide rental services for space, a shop, and catering, encouraging interaction and openness of society for a real inclusion of their students. The goal is to establish a direct connection between people with disabilities and society, facilitating an easier and more effective integration between these two parts.

Aiming to expand the Academy to a single location and increase its capacity, Semear seeks to explore business models and financing options, to ensure a financially sustainable project. That being said, this thesis's key objective is to assess the feasibility of the organization's vision, both in terms of construction/creation and financial sustainability. This study covers not only the trajectory of Semear and its impacts but also makes an overview and addresses the problem of unemployment and social exclusion faced by the population with disabilities in Portugal.

To handle this issue, three main research questions have been identified:

1. What are the best financing practices for consolidating multiple campuses into a unified educational institution, emphasizing a comprehensive market analysis to identify the most efficient and sustainable financial strategies?
2. What are the best practices implemented in other higher education institutions for people with IDD internationally that can be adopted into Semear's new single unified campus?
3. What is the financial viability of the campus consolidation project, analyzing the project's financial aspects, including costs to ensure a sound and successful implementation?

This research aims to address these research questions, analyzing the Implementation and Financial Feasibility of Semear's vision.

2. Semear Overview

Joana Santiago is the face behind Semear, and it was not until her youngest child was born with a disability that she faced and realized the struggle to find options and answers for their challenges. In 2005, Joana along with many parents of disabled people created BIPP, which gathered all the available data regarding existing resources in Portugal that could somehow help people with disabilities and their families. Further on, Joana realized that an active and consistent mechanism of helping people with disabilities was urgently needed to increase their skills. In 2014, Semear was created with one clear mission: to implement sustainable programs that promote an active role of people with disabilities in society. Through these programs, students can enhance their technical skills and even more importantly their social skills where they can become more independent and autonomous. Semear is focused on addressing objectives 4, 8, 10, 11, and 12 of the Sustainable Development Goals by sharing the values of respect, dedication, innovation, and sustainability among their stakeholders which include: (i) companies, (ii) direct beneficiaries, (iii) government, (iv) clients, (v) volunteers and (vi) academic partners. Semear is composed of their academy and their social businesses: (i) *Terra*, (ii) *Mercearia*, and (iii) *Cerâmica*.

2.1. *Academia Semear*

The pathway to implement Semear's mission starts in *Academia Semear*. This academy offers certified education to people with IDD (Intellectual or Developmental Disability) among a set of areas of expertise: (i) agri-food, (ii) catering, (iii) pottery, and (iv) administration. Academia Semear offers two kinds of programs to their students:

1. Programa Semear – Psychosocial intervention, professional training, progressive approach to the job market, inclusion, and maintenance in the job market. Professional training in the areas of storage, food industry, agriculture, and catering. The duration of the program and curriculum plan is adapted to the profile of each student and future professional, with a minimum duration of 2 years.
2. Training courses under the Lisbon Regional Operational Program, Operation Typology, Qualification. People with a Disability or Incapacity – 3 different pathways A, B, or C, based on adapted training references, are integrated into the CNQ (National Catalogue of Qualifications).

In 2024, the academy has 105 students enrolled in their training programs and more than 60 have been integrated into the job market and in society. Besides these programs, Semear also performs initiatives at schools and companies where they aim to promote a more inclusive environment in every space from an early age.

2.2. *Mercearia Semear*

Mercearia Semear was the first social business created by Semear which aims to train and integrate people with IDD through the preparation, packaging, and selling of handmade gourmet products. All the products sold by this business are produced from fruits and vegetables that were going to be wasted. The grocery supplies a wide range of products such as sweets, jellies, chutneys, biscuits, wines, and cheeses, among others. These products can be purchased in baskets or by unit and are available in the online store and some physical spaces (Armazém Semear, Academia Semear, and Restaurante Único). The revenues of all social businesses are totally reinvested into the training and integration of even more people with IDD.

In 2022, more than 8 tons of fruits and vegetables that were going to be wasted by local producers were used to produce 58000 products at *Mercearia Semear*. There were more than 50 corporate volunteering actions where more than 500 volunteers helped the team with all the processes in the preparation and packaging of products. The team is composed of 10 members where 40% of them are people with IDD.

2.3. *Terra Semear*

Terra Semear is an organic farming production unit located in *Oeiras*. This space trains and employs people with IDD in the agri-food sector and is also used for actions to raise awareness in society such as (i) thematic workshops, (ii) vegetable gardens, (iii) corporate volunteering actions, and (iv) team buildings. This business aims to prioritize what is most natural and seasonal in their crops, to reduce the CO2 footprint and promote the conservation of the evolving environment.

In 2022, 21 tons of organic agricultural products were harvested from their 7-acre fields where 4 of them were donated to institutions and families in need. There were more than 50 corporate volunteering actions where almost 2000 volunteers helped the team with harvesting. The team is composed of 11 members where 55% of them are people with IDD.

2.4. Cerâmica Semear

Cerâmica Semear is the most recent social business of Semear where the students with lower degrees of independence can be trained and show their talent in creating unique pieces of pottery. The products created by the students are sold online and in physical stores located in MAAT, *Central Tejo*, and *Portugal Manual*, among others. In 2022, more than 2000 unique pieces were produced of which 1574 were sold.

2.5. Restaurant Único

The *Único* restaurant is a project of Semear with CCB (*Centro Cultural de Belém*) and *Este-Oeste* restaurant and brings together a part of all social businesses. This restaurant employs and integrates people with IDD where their focus is to promote sustainability by using products from organic farming like Terra Semear and reducing food waste. This business is a method for students to have practical experience in the area of catering in a safe and inclusive space enhancing their social skills. Besides using products from *Terra Semear*, it is also possible to buy gourmet products from Mercearia Semear and unique pieces of pottery from Cerâmica Semear in the restaurant.

2.6. Partners and Acknowledgments

Several partnerships, characterized by a strong awareness of ESG criteria and social and financial sustainability, have been contributing to Semear's success and sustainability. Some of the most crucial partners include *Instituto Superior de Agronomia* and *Instituto de Investigação Agrária e Veterinária*, which, through the provision of space at *Tapada da Ajuda* and *Quinta do Marquês* in *Oeiras* make it possible to implement the program.

Moreover, in recent years, Semear has been receiving several acknowledgments for their social work. These are signs that the paradigm regarding the attention given to people with disabilities is changing in Portugal, and good practices in this area are being increasingly valued. Important Acknowledgments include “*Selo de entidade empregadora inclusive*” which promotes the recognition and public acknowledgment of practices developed by employers of people with disabilities and “*Certificado de agricultura Biológica*”, which recognizes organizations with global farm management and food production systems that combine the best environmental practices, a high level of biodiversity and the preservation of natural resources.

3. Literature Review

3.1. Social Entrepreneurship

Social entrepreneurship (SE) emerges as a significant force driving important changes in society, rooted in the innovative efforts of individuals and organizations addressing crucial challenges. Pioneering figures like Bill Drayton and Muhammad Yunus have played pivotal roles in shaping SE, spanning a spectrum of missions from empowering marginalized communities (Haugh & Talwar, 2016; Qureshi et al., 2021) to addressing poverty (Mair et al., 2012; Sutter et al., 2019), and participating in environmentally conscious initiatives like conservation (Belz & Binder, 2017; Calic & Mosakowski, 2016).

The evolution of SE is closely tied to the increasing complexity of societal challenges, aligning with the growing awareness of governments' limitations in addressing social welfare needs (Stephan et al., 2015; World Bank, 2017). Positioned as a dynamic force for positive change (Dacin et al., 2011), SE stands apart from conventional commercial entrepreneurship (Mair & Martí, 2006). Influential figures like Bill Drayton, Muhammad Yunus, and Marc Koska serve as prime examples of SE's dedication to addressing a range of societal issues (Drayton & Budinich, 2004; Yunus et al., 2010; Denend et al., 2014).

In academia, the exploration of SE has gained momentum, unveiling diverse perspectives and sparking debates. The absence of a universally agreed-upon definition leaves SE as a broad term, encompassing various socially beneficial initiatives (Cherrier et al., 2018).

SE literature explores different facets, digging deep into the intricacies of individual social entrepreneurs (Ahmed et al., 2021) and the organizational challenges in delivering impactful social outcomes (Battilana et al., 2015). Macro-level studies dig into socioeconomic drivers, political and societal contexts, and the holistic entrepreneurial ecosystem (Ramani et al., 2017). Other perspectives illuminate practical "how-to" aspects of implementing SE, unraveling strategies at both individual and organizational levels (Lumpkin et al., 2013).

Review studies, like Saebi et al. (2019) and Gupta et al. (2020), meticulously identify gaps and outline research themes within SE, urging a comprehensive understanding of this evolving field. Despite these academic efforts, synthesizing research remains a nuanced challenge, prompting calls for systematic reviews to organize SE research (Gupta et al., 2020; Sassmannshausen & Volkmann, 2018).

In conclusion, the expansive literature on SE unveils its evolutionary trajectory, diverse missions, and the pressing need for a unified understanding. Influential social entrepreneurs

and notable papers have shaped the discourse, and ongoing research aims to bridge gaps, offering a nuanced view of SE's impact on society. This exploration captures the richness and complexity of SE, underscoring its pivotal role in shaping a more sustainable and socially conscious future. The ongoing discussion about how social entrepreneurship can bring positive changes is vital for dealing with today's complex social issues. It encourages more research and active involvement from academics in this dynamic field.

3.2. Benchmarking Analysis

Benchmarking was defined by former CEO of Xerox, David Kearns as the “continuous process of measuring products, services, and practices against the toughest competitors or those companies recognized as industry leaders” (Camp, 1989). Xerox was the first successful case of benchmarking in the 1980s. In the early 1980s, Xerox's market share had decreased by more than 50% and was very vulnerable to intense competition from domestic and international competitors. David Kearns took over as CEO of Xerox in 1982 and decided to investigate other companies in the industry to try to realize how they could improve. Benchmarking was a key component in the program implemented at that time by Kearns which led Xerox to be one of the most successful cases for this type of process (Boxwell, 1994).

Benchmarking is also a way of measuring your firm's strategies and performance against “best-in-class” firms, both inside and outside your own industry. The aim is to identify best practices that can be adopted and implemented by the organization to improve company performance. (Freytag & Hollensen, 2001).

Spendolini (1992) defined benchmarking as the continuous, systematic process for evaluating the products, services, and work processes of organizations that are recognized as representing best practices, for organizational improvement.

Benchmarking is more than just gathering data. It involves adopting a new approach in which one continually questions how processes are performed, seeks out best practices, and implements new models of operation (Alstete, 1995).

The process of benchmarking can be divided into four phases: (i) planning, (ii) analysis, (iii) integration, and (iv) action. (Camp, 1989; Hacker & Kleiner, 2000) These phases can be subdivided into steps to reach the outcome. The steps used in this research study are from the first two phases which include:

- 1- Identify what is to be benchmarked

- 2- Identify comparative companies
- 3- Determine the data collection method and collect data
- 4- Determine current performance levels

Depending on the organization that serves as the benchmarking partner, 5 types of benchmarking can be identified:

Internal benchmarking – This refers to partners within your company, or division, who may be based at the same, or a different location. Many companies, when they begin benchmarking, start by looking for internal comparisons. Data is collected relatively easily, the culture and language are the same, the surroundings are familiar, communication channels exist, and management knows each other. (Codling, 1992)

Competitive benchmarking - This type of benchmarking is used against direct competitors. Performed externally, its objective is to compare companies offering competing products, services, or processes in the same markets. With direct competitors, information is not easy to obtain. Public domain information is the most accessible. If some key customers in the market have experience with more suppliers (competitors) they may be willing to give their evaluation of these suppliers. But this method often involves high costs. (Freytag & Hollensen, 2001)

Functional / Industry benchmarking - Functional benchmarking involves the identification of products, services, and work processes of organizations that may or may not be your organization's direct competitors. The objective of functional benchmarking is to identify best practices in any type of organization that has established a reputation for excellence in the specific area being benchmarked. (Spendolini, 1992)

Generic benchmarking – The institution seeks new and innovative practices across multiple industries to uncover the “best of the best” (Levy & Ronco, 2012)

Global benchmarking – compares an organization where its geographical location extends beyond country boundaries (Fong et al., 1998)

To summarize, benchmarking analysis is extremely important to have nowadays since to be the best we need to learn from the best. Benchmarking is a continuous process of identifying what are the problems our business has, and how and where we can find the solutions for those problems that arise.

3.3. Disability and Care in Portugal's Welfare System

In examining the Southern European welfare regime, particularly within Portugal, the late-stage development of the welfare state and its implications for individuals with disabilities and their families has been a subject of scholarly investigation. Drawing insights from scholars such as Salvado (2008) and Baptista (1999) it aims to uncover the nuanced relationships between the historical evolution of the welfare state, specific provisions for families with disabled children, and the challenges faced by families in caregiving roles.

The Portuguese welfare state took a significant turn after the 1974 democratic revolution, marking a pivotal shift from an authoritative right-wing government to a more democratic governance structure. The late development of the welfare state has left a strong mark on its character. Marques (1997) notes that the welfare state in Portugal began to take shape after the democratic revolution, removing the right-wing government that had ruled the country for over 40 years. This transformation laid the groundwork for subsequent welfare policies, impacting the gendered dynamics of caregiving roles within households.

Gender differentials in benefit uptake persist in Portugal, particularly evident in the context of parental leaves. While a significant number of women utilize maternity leave, the uptake of paternity leave by fathers remains comparatively low. Cultural norms and limited awareness of available benefits may contribute to this divergence in behavior among Portuguese mothers and fathers, reinforcing traditional patterns of domestic and care labor division.

In addition to benefits available to the general population, the Portuguese welfare state incorporates specific provisions to support families caring for disabled children. These provisions include a supplement to family allowances, special education benefits, a life-long disability allowance, and an allowance for assistance by a third person. However, despite these measures, the welfare regime in Portugal tends to position disability predominantly as a family matter. Families, and often mothers, are expected to be the primary caregivers, relegating the state's welfare role to a supplemental function.

The caregiving burden placed on families, especially mothers, is intensified by the scarcity of service provisions for adults with disabilities in Portugal. Baptista (1999) notes that this forced caregiving role raises questions about the human rights of individuals with disabilities, who find themselves compelled to receive care from their families. The financial inadequacies, coupled with the scarcity of services, prompt important inquiries into the overall fairness and sustainability of the current welfare paradigm.

Wider debates within disability studies, as highlighted by scholars such as Morris (2004), Barnes et al. (2000), and Oliver (2012), underscore the need for a paradigm shift. The prevalent social attitudes and welfare provision models, influenced by medical perspectives, tend to construct disabled individuals as "dependent," restricting their autonomy and control over their lives. The Independent Living concept, emerging over the past few decades, emphasizes the principles of choice and control for disabled individuals, challenging the existing paradigm and advocating for the removal of societal barriers to increase inclusivity.

The UN Convention on the Rights of Persons with Disabilities dedicates an article to the issue of living independently and being included in the community. Article 19 underscores the equal right of all persons with disabilities to live in the community, with choices equal to others. It urges state parties to recognize and take effective measures to facilitate the full enjoyment of this right, ensuring the inclusion and participation of persons with disabilities in the community.

To sum up, Portugal's welfare landscape reveals a complex interplay of historical, cultural, and policy factors that shape the experiences of individuals with disabilities and their families. The late development of the welfare state, coupled with persistent gendered norms and limited-service provisions, underscores the challenges faced by families, particularly mothers, in providing care for disabled members. The wider discussion within disability studies advocates for a paradigm shift towards greater empowerment, choice, and control for disabled individuals, challenging the existing welfare narrative. The journey towards a more inclusive and empowering welfare approach aligns with evolving perspectives on the rights and autonomy of individuals with disabilities and their families.

4. Methodology

Firstly, an analysis was conducted to find the best funding alternatives that could enable Semear's project. The methodology for securing financing from the Portuguese government and European Union Social Funds for Semear's initiatives involved several steps. Initially, potential funding sources tailored for projects like Semear's were identified through extensive research. Eligibility criteria for each opportunity were then evaluated, as well as funding proposals, to make sure that there was an alignment between Semear's objectives and those of the targeted funds.

After that, a benchmark analysis of other higher education institutions across the world was conducted to understand what are the best practices that can be implemented in the future unified campus of Semear. For that, was conducted research on three important higher education institutions (i) Trinity College in Dublin, (ii) Think College in the United States, and (iii) Autonomous University in Madrid (UAM). The chosen case studies represent different models providing a wide range of perspectives to draw insights from. In addition, Trinity College in Dublin, and the Promentor Program (PP) at the UAM were chosen for their pioneering efforts in higher education for people with IDD in Europe, being the latter selected also due to their cultural similarities. Finally, Think College was included since it is one of the largest global organizations supplying students with IDD, with more than 300 partnerships with Higher Education Institutions (HEIs) throughout the US.

Finally, a CAPEX analysis was performed, to have a clearer picture of the magnitude of Semear's needed investment costs. The methodology for assessing the total implementation costs for Semear's new campus began with Semear's vision and requirements. Building contractors were then engaged to assess infrastructure needs and associated expenditures through site assessments and estimations, followed by the development of a comprehensive budget outlining projected costs for construction, equipment, and other factors. This approach provided Semear with a clear understanding of the total CAPEX required for the new campus establishment.

5. Funding analysis

In our contemporary society, ensuring inclusivity is a cornerstone value. Organizations like Semear play a crucial role in this matter, striving to empower individuals with disabilities and integrate them fully into society. However, achieving this objective is not without its challenges, particularly concerning funding. As Semear embarks on the ambitious journey of consolidating its various campuses into a unified educational institution, the importance of robust financing strategies become increasingly important. This chapter seeks to explore the intricacies of financing, offering an examination of different approaches while highlighting the crucial role of market analysis in ensuring the long-term viability of Semear's mission.

At the core of Semear's objective lies the necessity to secure subsidies for its operational functioning. These grants, comprising funding applications to entities like IEFP, donations, and patronage from various sources, form the backbone of Semear's operations. In 2022, 51% of Semear's financing came from sales and services. The remaining 49% (988 797 euros) corresponds to subsidies and donations, of which more than half comes from private funding (patronage), subsidies corresponding to public applications (grants), and some monthly tuitions. This shows the importance of subsidies and donations for funding. However, going through the complexities of grant procurement comes with significant challenges. Semear's management is aware of this fact and has estimated a constant figure of five hundred thousand euros annually of operating grants from public entities to ensure stability and continuity. Nevertheless, determining the precise financial requirements remains an effort that requires meticulous planning.

By gaining deep insights into market dynamics such as demand, competition, and regulatory frameworks, Semear can identify opportunities and anticipate challenges. Furthermore, benchmarking against successful international initiatives provides invaluable lessons and informs strategic decision-making. Through a comprehensive understanding of the market landscape, Semear can tailor its financing approaches to maximize impact and sustainability.

Considering the exact value of funding from either the European Union or the Portuguese state was deemed unfeasible at this early stage of the project's development. However, there remains optimism that securing strong government and European support in the future could enhance the project's viability.

In the Portuguese landscape, *Portugal Inovação Social 2030* (PIS 2030) is one of the most viable sources of funding for Semear, when financing lines are open up for the Lisbon district. *Fundo para a Inovação Social* (FIS) project, implemented by PIS 2030, presents an intriguing example of a funding opportunity for Semear. Like many of the funds implemented PIS 2030, FIS serves as a governmental tool designed to stimulate impact investment within Portugal, that includes a credit line represented by non-repayable loans of up to €2.500.000 .Its primary objective is to nurture and bolster social innovation and social entrepreneurship projects, in consolidation or expansion phases, that offer sustainable solutions to tackle societal problems, which comprises social inequalities regarding people with disabilities. As an autonomous fund, FIS is financed by *Programa Operacional Competitividade e Internacionalização* (COMPETE 2020) and the European Union and is managed by *Banco Português de Fomento* (BPF).

Created by Decree-Law no. 28/2018 of May 3, FIS` primary target is towards financing/investing in impact businesses that are recognized as ISEI (Innovation and Social Entrepreneurship Initiative) by *Estrutura de Missão Portugal Inovação Social*, following the requirements from other PIS 2030 funds. For a project to be considered an ISEI, at least three requirements must be met: a) a social problem is approached - there is an identifiable target group with a specific vulnerability; b) the proposed solution is differentiated- the solving of the social problem is different from existing conventional responses, namely those provided by the State or contracted with the State, and this difference is based on an innovative product, service or methodology; c) the project must have the potential for social impact- there is capacity to positively influence the quality of life or development prospects of the people who make up the target group. Semear clearly meets these requirements, with its ambitious business proposition, making it a potential candidate for this type of funds.

FIS receives financial support from the European Social Fund (ESF+) and National Funds, with €35.000.000 and €6.176.471, respectively, and focuses on two types of financial instruments: financing (debt) and co-investment (equity). On the debt side, there is *FIS Crédito*. Through the provision of counter-guarantees and guarantees to credit institutions, this instrument allows loans to be granted to Social Economy organizations and SMEs so that they can finance their ISEIs. The conditions associated with these loans, namely the grace period, the maturity period, interest rates, and the provision of collateral, will be lower than the usual market conditions and will be more suited to their actual needs. Loans are made up to €2.500.000, with a financing period that can reach 10 years (a grace period of up to 3 years). To be able to access these funds, Semear must be qualified as an ISEI and apply at the

participating banks. On the equity side, there is *FIS Capital*. Always co-invested with private capital in the final beneficiaries, this instrument allows investors to leverage capital and quasi-capital operations, providing them with call options during the first 6 years of investment. Investors such as Business Angels, Venture Capital Funds, SMEs, and Foundations, among others, can apply to the *FIS Capital* line. In this case, SMEs are the entities eligible for investment. Co-investments can also be made up to €2.500.000, within an investment period of 10 years. Again, to benefit from these resources, Semear must be qualified as an ISEI. Moreover, it should have an application completed and submitted online by the investor.

Figure 1 - FIS Fund Characteristics

	FIS Crédito	FIS Capital
Potential Candidates	Social Economy Entities and SMEs	Formal private investors, other organisations or individuals
Final Beneficiaries	Social Economy Entities and SMEs	Startups and SMEs
Minimum Amount Per Financing/Coinvestment	-	€25.000 (FIS Investment)
Maximum Amount Per Financing/Coinvestment	Loan up to €2.500.000	FIS Investment up to €2.500.000
Financing Period/ Coinvestment Period	Up to 10 years (grace period up to 3 years)	Up to 10 years
Territorial Scope	Final Beneficiaries must develop the funded ISEIs in the considered regions of Norte, Centro and Alentejo	
Application Process	ISEI Qualification + Bank Application	ISEI Qualification + Application completed and submitted online by the investor

Source: <https://www.fis.gov.pt/wp-content/uploads/2020/11/tabela-flyer-pt-FIS.pdf>

Furthermore, Semear also currently does applications for funding to other public and private organizations that open funding lines once a year or less, to which they can apply if eligible according to the regulations. This mainly includes IEF- Applications for funding for people with disabilities (most of these are low-value funding, with values below €50.000), and companies such as *Fundação BPI la Caixa*, *VINCI*, *Crédito Agrícola*, *CGD- fundação Caixa Social*, *Cepsa*, *Casa do Impacto*, *Fidelidade Comunidade* and *REN- Agir*.

While accessing government support may seem daunting, strategic advocacy efforts can significantly enhance Semear's prospects. Aligning with national inclusion agendas and showcasing tangible benefits can strengthen Semear's case for governmental funding. Although some European Union and Portuguese state funding may not be immediately accessible, persistent advocacy efforts can improve Semear's prospects over time. Moreover, Semear can

explore collaborative partnerships with governmental agencies to access funding streams earmarked for initiatives promoting societal inclusion. Naming parts of the Campus after some company name can also bring investments from such enterprises, in the form of a sponsorship. Despite the financial hurdles, Semear remains strong in its commitment to sustainable inclusion. By fostering strategic partnerships, leveraging innovative financing mechanisms, and advocating for support, Semear can navigate challenges and seize opportunities. Effective financing strategies are indispensable. The sustained support of operating grants, including the annual tentative figure of five hundred thousand euros, is paramount for Semear's success in fostering societal inclusion and advancing the cause of inclusivity in Portugal and beyond.

In conclusion, Semear stands as a promising candidate to secure funds from FIS and other potential financing lines implemented by PIS 2030, given its alignment with the fund's main requirements and the congruence between the Portuguese State fund's objectives and Semear's business model. With its focus on empowering disabled individuals through social enterprise, Semear embodies the spirit of innovation and social impact that FIS aims to support. A potential investment of up to €2.500.000 could be a game-changer for Semear, enabling it to significantly expand its operations and further its mission of inclusivity and empowerment for the disabled community.

6. Benchmark Analysis for Best Practices

Having a job is essential for several reasons, impacting both individuals and society as a whole. Employment provides people with a sense of purpose, and financial stability, and provides opportunities to grow either professionally or personally. According to McGlinchey et al. 2013, “Employment has long been associated with numerous benefits to the employed person both people with an intellectual disability (ID) and in the general population in terms of self-esteem (Dunnet al., 2008), confidence, independence, social inclusion (Carew et al., 2010; Jahoda et al., 2009), physical and mental health (Butterworth et al., 2011), sense of identity (Burstrom, 2010) and quality of life (Nota et al., 2010).”

On the other hand, Education plays a crucial role in the improvement of the human condition through enhancing knowledge, health, living standards, social fairness, productivity, longevity, and greater civic and democratic participation. Moreover, education externalities are overwhelmingly positive, contributing to economic growth, reduced crime rates, and advancements in technology and ideas (Spiel et al., 2018).

As mentioned before, there are countless benefits to both education and employment from a personal and societal perspective. These two concepts are often linked, with higher education often serving as a pathway to provide better employment opportunities and career development. Individuals can take advantage of pursuing a degree to acquire valuable knowledge more tailored to their career choices, develop soft skills through group projects and networking opportunities, and earn practical knowledge via research projects, and internships. To support this view, we have several studies that can conclude that higher education tends to get more employment opportunities (Shabbir & Hina, 2018; Lettmayr, 2012; Harvey, 2000).

In this sense, people with IDD need to have easier and better access to inclusive higher education opportunities to be able to experience all the benefits that come with it. An inclusive higher education perceives all students as capable of learning and contemplates all types of diversity, finding tailored responses to each student's unique needs (Pérez, 2012). Despite being a problem that has been addressed in many countries for some time now, it is still a very recent topic in Portugal. This chapter will address best practices in other countries regarding higher education programs where the value of people with IDD has been widely recognized since they are a group of students who have been traditionally excluded due to typical admission criteria (Machado et al., 2021).

According to Hart et al. (2006) and Machado et al. (2021), the programs in higher education for students with IDD are based mainly on three models: (i) segregated model, (ii) mixed

model, and (iii) full inclusive model. Each model is described below, according to the level of inclusion of the students with IDD, compared to the one experienced by their peers without disabilities.

- (I) Segregated model – Students participate only in classes for students with IDD. Based on this model, programs are commonly referred to as “life skills” programs. Students may be able to participate in generic social activities on campus and have employment experiences, inside or outside the higher education institution. George Mason University (Virginia, USA) and Universidad Autónoma de Madrid (Spain) are examples of institutions that present programs based on this model.
- (II) Mixed/hybrid model – Students with IDD generally have the option of attending classes in the curricular units of the higher education institution’s regular offer, and having other curricular units specifically designed for them; employment opportunities, on campus or in the local community, are an essential part of the curriculum. The University of Dublin (Ireland) at Trinity College, offers a program following this model.
- (III) Full inclusive model – Students receive individualized support, with a system of supports (tutor/coach, mentors...), in curricular units from undergraduate/master’s degree regular courses for credits. The student’s interests and goals motivate the choices of the curricular units, as well as their support. The focus is on establishing a career goal, identified by the student, that will guide his/her curricular options. This model has been followed, for example, by the Universities of Alberta and British Columbia (Canada) and Flinders University (Australia).

Building the framework of the project, some cases are going to be studied in other countries trying to understand and adopt best practices at Semear. The case studies that are going to build upon Semear’s new strategy are (i) Trinity College in Dublin, (ii) Think College in the US, and (iii) Autonomous University in Madrid. These case studies were chosen to cover all three models described earlier to have a broad scope of options to take insights. Moreover, Think College was chosen since it is one of the largest organizations for people with IDD worldwide with over 305 partner colleges and universities across the US. Finally, both the programs from Trinity College in Dublin and the PP from UAM in Madrid are pioneers in higher education for people with IDD in Europe, the latter being also chosen due to cultural similarities.

6.1. Trinity College Dublin

Usually, in Ireland, young people with IDD who completed mandatory secondary education were expected to transition to adult day services and sheltered workshops run by community-based disability support agencies under the remit of the Health Service Executive. According to the National Intellectual Disability Database (NIDD), 23,583 individuals with intellectual disabilities were enrolled in full-time day service provision in 2017 (INHEF, 2019). As mentioned previously, the level of education has a very strong effect since those affected by some kind of disability while still in school face many challenges in moving into their first job (Watson et al., 2017).

In recent years, the Higher Education Authority has introduced specialized support services in HEIs to address the needs of students with disabilities. The Disability Access Route to Education program was also established to facilitate access to higher education for students with disabilities and special educational needs. However, there has been historically low participation of students with intellectual disabilities in higher education in Ireland, as documented by the NIDD. Despite the ratification of the United Nations Convention on the Rights of Persons with Disabilities in 2008, which emphasizes the right to education for individuals with disabilities, initiatives to support inclusive education have faced challenges due to funding constraints.

Over the past decade, various educational initiatives have been developed within Irish HEPs, but not all have been sustained. To address the need for a coordinated national response, the Trinity Centre for People with Intellectual Disabilities (TCPID) at Trinity College Dublin secured funding from the Social Innovation Fund Ireland in 2018. This funding aims to establish a national forum to support existing and future HEPs for people with intellectual disabilities and to develop a pathway from secondary education to higher education for students with intellectual disabilities.

The TCPID, formerly established as NIID a distinctive project located in Trinity College Dublin, Ireland, is a ground-breaking initiative created in 2004 and since its approval by the University Council in 2006, more than 120 students have graduated from the program. They are guided by the motto: "Disability is a mask that conceals a rich, surprising, and fertile ability. The function of the Trinity Centre for People with Intellectual Disabilities is to remove the mask and reveal the beauty and promise of a hitherto hidden talent now brought into the light of day and the light of appreciative minds" stated Brendan Kennelly, a senior fellow at Trinity College Dublin.

NIID developed the Certificate in Contemporary Living (CCL), a two-year full-time course for students with intellectual disabilities was established, known as the College Certificate in Life. The main goal of the CCL was to introduce these students to college life and help them develop essential life skills. However, the course did not correspond to an appropriate NFQ level, and graduates did not receive a formal qualification. However, in 2016 this course was substantially redesigned and adjusted to align with level 5 of NFQ. The program now consists of a two-year full-time course for students with intellectual disabilities where they can study 17 modules across a broad range of topics and subjects. The program, usually a two to three-year course, covers a multidisciplinary breadth of academic, vocational, and social life. Participants will do subjects in the fields of arts, poetry, film studies, expressive arts, disability rights, and human rights. There is also a big focus on business subjects like entrepreneurship or marketing. TCIPD also offers vocational training as well as employment opportunities supported by us to enable the participants to learn practical skills and to find an occupied place in the workforce afterward.

As mentioned before, many initiatives to support inclusive education have faced challenges due to funding constraints and TCPID is no exception. Due to lack of funding, they needed to find a way to gather funds for themselves through their partners like A&L Goodbody, Chartered Accountants Ireland, and recently, Bank of Ireland. The process is simple: if companies are interested in joining the TCPID Business Partners Network, they sign a one-page partnership agreement with the TCPID and commit to a donation of either €5.000 – to become a partner – or €10.000 to become a patron. This donation goes through the Trinity Foundation / Trinity Development and Alumni which is the registered charity body within Trinity College Dublin. Besides that, new partners can also sign a TCPID Graduate Internship Agreement if they are interested in taking on one of our graduates for a paid internship.

Moreover, some funds launched by the Department of Further and Higher Education, Research, Innovation, and Science aim to improve access to higher education for students with IDD. Part of the National Access Plan, the Programme for Access to Higher Education is a strategic funding programme in which the 4th strand (PATH 4) is a two-phase programme supporting inclusive, universally designed higher education environments and course provision for students with intellectual disabilities. The second phase of this program is receiving proposals from HEIs for course provision for students with IDD during the next 3 years (€3m annually). The research on the impact of the mixed/hybrid model on Trinity College was conducted by two studies: (i) O'Brien, Shelvin et al. (2009) and (ii) Kubiak (2017), from which we gained insights into the perspectives of intellectually disabled students, such as:

- Students with IDD feel included in the process of learning among their peers - including all students - since they are entitled to work on the same projects as the rest of their classmates
- Close relationships with their mentors – former undergraduates from Trinity College - with whom they share their personal and academic life experiences
- The learning process shifted from only the concrete experience of the course content to the development of personal characteristics such as gaining perseverance, increased confidence, and becoming more independent
- Improve communication skills with other students to foster relationships among them – even scheduling field trips to other countries - which ultimately increases their teamwork and group work competencies
- Engage in classroom discussions and debates to help students learn to control their own actions and practice self-regulation

While TCPID is still evolving towards a more inclusive society, Semear can examine and implement its best practices. Regarding funding, Trinity College is a more well-established institution in a country that is investing funds to shorten the gap for students with IDD, so Portugal needs to start investing larger amounts towards this kind of societal problem. Besides that, Semear could attempt to establish agreements with businesses, through which they could receive not only professional but also financial support. Concerning best practices enforced at TCPID, students with IDD are included in the learning process alongside their peers, maintain a close relationship with their mentors, and focus on developing personal characteristics. All this will be crucial to nurturing relationships with their peers, staff, and mentors, improving their teamwork skills, and helping them learn self-control.

6.2. Think College

Postsecondary education and students with IDD were not compatible until the end of the 1970s with the implementation of the Education for All Handicapped Children Act where students with the most significant disabilities were guaranteed public education at all. (Kleinert et al., 2012). Efforts to include people with intellectual disabilities in higher education began in the early 1970s, focusing mainly on providing access to separate or segregated experiences on college campuses (Neubert et al., 2001).

Education legislation and policies pave the way for most research and practices deciding the allocation of funds, and parameters of services, and creating new paths to be explored. In this sense, the enactment of the Higher Education Opportunity Act (HEOA) in 2008 which defined for the first time in higher education the term “intellectual disability” was the most impactful recent legislation. (Grigal, M. et al.,2012). In addition, the HEOA created a new category of eligible higher education programs, called Comprehensive Transition and Postsecondary Program (CTP) where students who are eligible for the program will have their tuition supported by three kinds of federal financial aid: (i) Federal Pell Grant, (ii) Federal Supplemental Education Opportunity Grant, and (iii) The Federal Work-Study Program. (Boyle, M.,2012). Later, in 2010, the HEOA authorized support for the creation of model demonstration projects, commonly referred to as Transition and Postsecondary Programs for Students with Intellectual Disabilities (TPSID) (Grigal, M. et al.,2018). They intended to enable HEIs to create or expand high-quality inclusive models of comprehensive transition and postsecondary programs for students with IDD. In that same year, the Office of Postsecondary Education awarded grants to 27 HEIs to fund TPSID in 23 states and created a National Coordination Center (Grigal, M. et al.,2012). The TPSID model demonstration program has funded three cohorts of grantees, each at an HEI. In total, the TPSID initiative has funded 74 grants in 34 states between 2010 and 2020. Numerous grantees endeavored to create programs not only at their host HEIs but also developed consortia structures, establishing programs at other HEIs in their states by offering funds and technical support. As of July 2021, these initiatives have led to the establishment or enlargement of higher education programs at 119 college or university campuses in the US, accommodating over 4500 students with IDD. The corresponding National Coordination Center project was awarded to Think College at the Institute for Community and Inclusion at the University of Massachusetts Boston (Grigal, M. et al., 2021).

Think College is a national technical assistance, research, and evaluation center dedicated to developing, expanding, and improving higher education options for students with IDD. Established upon the idea that all people should be granted postsecondary education access, Think College will offer a wide variety of programs and resources necessary to help students with intellectual disabilities with their educational pursuits and career paths. Think College is a national technical assistance, research, and evaluation center dedicated to developing, expanding, and improving higher education options for students with IDD through the following ways (Think College, 2022):

- Generating and sharing knowledge: They conduct research on higher education, employment, and transition practices, using findings to create accessible resources such as learning modules and webinars
- Building capacity: Think College provides technical assistance on postsecondary education for students with IDD through a national help desk, ensuring all stakeholders are awarded appropriate support
- Guiding Program Quality Improvement: They have developed model accreditation standards and training tools to help colleges and universities monitor and improve program quality
- Informing Public Policy: Think College provides data and resources to inform the development of policies, including input from college students with IDD, and monitors legislative activity educational trends
- Engaging with Stakeholders: Through social media, and online communities, Think College supports families, educators, and students in connecting and learning from each other, fostering change in inclusive higher education

Higher Education has become increasingly accessible for students with IDD in the US due to legislative and policy changes. They can now access courses, earn credits, and explore career opportunities. As a result, they are leaving college with employment opportunities, improved independent living skills, and fulfilling social lives through establishing meaningful connections for life. All this constant progress throughout their degrees is a consequence of HEIs recognizing and investing in the potential of these individuals by creating inclusive systems and services. The presence of students with IDD on campuses has led to changes in legislation and policies, requiring collaboration among all the organizations involved. Moreover, the new research on these institutions on a national level enables them to understand the effectiveness of inclusive practices and adopt the best ones (Grigal, et al., 2021).

To enhance inclusive higher education at Semear, several best practices from Think College can be adapted. Firstly, generating and sharing knowledge is one key element for improvement. This can be achieved by researching higher education, employability, and best practices in HEIs for students with IDD, and using those findings to create accessible resources like webinars and learning modules. Furthermore, guiding program quality improvement through developing and implementing accreditation standards and training tools is also important. Lastly, it is essential to keep engaging with all stakeholders involved by fostering connections

among families, educators, mentors, and students outside campus activities through social media, weekly gatherings, and online communities to maintain its sustainability.

6.3. Program Promotor

Fully democratic societies are characterized by the active participation of each and every one of their citizens. In the educational setting, the right to inclusion and participation in shaping a better society translates into creating institutions that welcome students from all backgrounds, embracing diversity as a chance for social enrichment. Recognizing that inclusion has changed from being just a guiding principle to becoming a fundamental right, HEIs have in recent years implemented policies and practices to promote inclusion for people with IDD (Echeita & Ainscow, 2010). In Spain, the right to education is an essential and basic right for everyone, recognized, and protected by the Article 27 of the Spanish Constitution. (Martínez-Pujalte et Bochicchio, 2020). In the past, education for students with IDD was seen as a separate system from regular education. However, Spain introduced new regulations in 1985 that integrated special schools into the general education system. This transition promoted the integration of students with IDD into mainstream schools as the preferred option, paving the way for inclusion (Gasset et Herrero, 2017).

The PP, initiated in 2004 by Fundación Prodis (FP) and a group of lecturers at UAM, aims to provide higher education inclusion for people with IDD and promote their employment in regular job settings. In 2009, the university established a Sponsored Chair jointly with FP, the first in Spain dedicated to providing higher education for people with IDD and promoting their employment. The PP offers a course leading to the in-house certificate “Training for Labour Inclusion” and an education course aimed at graduates from the program. These courses are supported by the Labour Inclusion Service provided by FP. Research within the UAM-PRODIS sponsored chair focuses on syllabus analysis, inclusive processes, professional skills, and new technologies. The PP is recognized as the first Spanish university course adapted to students with IDD and is supported by the UAM-PRODIS Foundation-sponsored chair. (Gasset et Herrero, 2017 & Herrero et al., 2021).

The main objective of the PP is to create an inclusive university environment to train students in (i) personal competencies such as social skills, self-acceptance, and emotional education, and (ii) professional skills to enhance their employability. The Program strives for the following objectives (Gasset et Herrero, 2017 & Fundación Prodis):

- Apply acquired concepts, values, and skills independently in work environments, while also developing socio-labor commitments to become fully developed citizens
- Learn to use new information and communication technologies effectively, fostering adaptability to change and maintaining motivation for the rest of their lives
- Acquire necessary training to apply for adapted positions and actively participate in the university environment, fostering interpersonal relationships
- Collaborate with people with IDD to design personalized life plans using Person-Centered Planning (PCP). This includes offering job-focused training and Supported Employment services aimed at labor inclusion in the ordinary job market
- Provide life-long continuing education for workers in the regular job market and ensure necessary support for individuals with IDD to engage in leisure activities provided by the university and participate in their community

7. Implementation of the Project

To ensure the successful implementation of every project, Fixed Capital Investments are crucial, as they give a clearer picture of the requirements regarding initial investments. A final value of €14.534,199 was calculated for the total investment in Fixed Tangible Assets, split between Buildings and other Structures (€14.050.199) and Basic Equipment (€484.105). To have an idea of the costs of Buildings and other Structures, Semear entered contacts with building contractors, after carefully evaluating what were the most important items needed for the new campus. Regarding Basic Equipment, and for the development of this thesis, assumptions regarding quantities of needed equipment were made, and several companies such as Ricardo & Vaz, Worten, and Kaiserkraft were contacted, to get a perception of the costs (see *Appendix 1-5*). In this chapter, we will be focusing on Basic Equipment.

Figure 2 - Budget for Indoor Areas

Indoor Areas	Quantity	m2	m2 total	Total quantity	Price	Total price
Warehouse						89 270,97 €
Storage Space	1	1000	1000	-	77 000,00 €	77 000,00 €
Office	1	150	150			8 037,80 €
table	10	-	-	10	125,84 €	1 258,37 €
chair	10	-	-	10	96,89 €	968,91 €
drawer block	10	-	-	10	133,34 €	1 333,42 €
cupboard	10	-	-	10	264,78 €	2 647,84 €
printer	1	-	-	1	1 688,00 €	1 688,00 €
trash bin	10	-	-	10	14,13 €	141,27 €
Meeting Room	2	15	30			2 485,39 €
meeting table	1	-	-	2	241,02 €	482,03 €
chair	4	-	-	8	96,89 €	775,12 €
TV	1	-	-	2	599,99 €	1 199,98 €
trash bin	1	-	-	2	14,13 €	28,25 €
Bathroom/Changing Room	2	10	20	-	Built In	- €
Kitchen/Break Room	1	40	40			1 747,78 €
big dinning table	1	-	-	1	958,17 €	958,17 €
cafeteria chair	10	-	-	10	67,96 €	679,63 €
microwave	2	-	-	2	54,99 €	109,98 €

Source: Budget based on primary research over contacts with multiple companies

First of all, regarding indoor areas, there is the Warehouse, totaling €89.270. It can be divided into five main areas: (i) Storage space, (ii) Offices, (iii) Meeting Rooms, (iv) Bathroom/Changing Room, and (v) Kitchen.

Storage space costs €77.000, for 100 heavy racks. Moreover, Office costs amount to €8.037 (benefiting from a 5% quantity discount) which include 10 tables, chairs, drawer blocks, cupboards, and trash bins, as well as 1 printer. Meeting Room expenditures are €2.485 (for 2

rooms). Each meeting room has 1 meeting table, television, and trash bin, as well as 4 chairs. Kitchen costs are €1.747, for 1 big dining table (enough for 12 people using it at the same time), 2 microwaves and 10 cafeteria chairs. Toilets and bathhouses are already included in the total Warehouse cost.

Figure 3 - Budget for *Mercearia Semear*

Mercearia Semear	Quantity	m2	m2 total	Total quantity	Price	60 012,90 €
Industrial Kitchen	1	150	150		48 100,00 €	48 100,00 €
Support Warehouse	1	30	30	-	7 050,00 €	7 050,00 €
Product Handling Room	1	150	150		- €	- €
Bathroom/Changing Room	1	20	20	-	Built In	- €
Office	1	50	50			3 592,94 €
table	3	-	-	3	125,84 €	377,51 €
chair	3	-	-	3	96,89 €	290,67 €
drawer block	3	-	-	3	133,34 €	400,03 €
cupboard	3	-	-	3	264,78 €	794,35 €
printer	1	-	-	1	1 688,00 €	1 688,00 €
trash bin	3	-	-	3	14,13 €	42,38 €
Cabinet	2	15	30			1 269,96 €
table	1	-	-	2	125,84 €	251,67 €
chair	1	-	-	2	96,89 €	193,78 €
drawer block	1	-	-	2	133,34 €	266,68 €
cupboard	1	-	-	2	264,78 €	529,57 €
trash bin	1	-	-	2	14,13 €	28,25 €

Source: Budget based on primary research over contacts with multiple companies

Moving forward to Semear’s social businesses, the total cost for Mecearia Semear is €60.012, composed of the following 6 segments: (i) Industrial Kitchen, (ii) Support Warehouse, (iii) Product Handling Room, (iv) Bathroom/Changing Room, (v) Office, and (vi) Cabinets.

The Industrial Kitchen (€48.100) includes an oven, gas stove with 6 burners, a fridge, a dishwasher, hoods, worktops with hand wash, and no fryer or grill. The total cost was calculated using old values with a 20% inflation rate. The Support Warehouse, with 10 medium size racks, amounted to €7.500. Office and Cabinet expenditures were, respectively, €3.593, and €1.270. Product Handling Room costs were not considered because Semear’s objective is to reuse products they already have. Bathroom/Changing Room costs are already included, following the same logic as in the other areas.

Figure 4 - Budget for *Academia Semear*

Academia Semear	Quantity	m2	m2 total	Total quantity	Price	167 072,91 €
Classrooms	12	100	1200			78 391,69 €
table	6	-	-	72	132,02 €	9 505,55 €
chair	12	-	-	144	67,96 €	9 786,67 €
cupboard	6	-	-	72	264,78 €	19 064,45 €
white board	1	-	-	12	138,23 €	1 658,70 €
interactive board	1	-	-	12	2 499,90 €	29 998,80 €
trash bin	1	-	-	12	14,13 €	169,52 €
locker	6			72	114,00 €	8 208,00 €
Office	1	150	150			8 037,80 €
table	10	-	-	10	125,84 €	1 258,37 €
chair	10	-	-	10	96,89 €	968,91 €
drawer block	10	-	-	10	133,34 €	1 333,42 €
cupboard	10	-	-	10	264,78 €	2 647,84 €
print	1	-	-	1	1 688,00 €	1 688,00 €
trash bin	10	-	-	10	14,13 €	141,27 €
Quiet Room	1	100	100			1 336,37 €
table	6			6	125,84 €	755,02 €
chair	6			6	96,89 €	581,34 €
Cabinet	8	30	240			10 159,68 €
table	2	-	-	16	125,84 €	2 013,39 €
chair	2	-	-	16	96,89 €	1 550,25 €
drawer block	2	-	-	16	133,34 €	2 133,47 €
cupboard	2	-	-	16	264,78 €	4 236,54 €
trash bin	2	-	-	16	14,13 €	226,02 €
Kitchen/Cafeteria	1	250	250			69 147,38 €
semi-industrial kitchen	1	-	-	1	64 124,00 €	64 124,00 €
big dining table	3	-	-	3	958,17 €	2 874,51 €
cafeteria chair	30	-	-	30	67,96 €	2 038,89 €
microwave	2	-	-	2	54,99 €	109,98 €
Bathroom/Changing Room	2	30	60	-	Built In	- €

Source: Budget based on primary research over contacts with multiple companies

Now, and referring to the section where most costs are employed, we have Academia Semear (€167.073), constituted by: (i) Classrooms, (ii) Office, (iii) Quiet Room, (iv) Cabinets, (v) Cafeteria/Kitchen, and (vi) Bathroom/Changing Room.

Classroom costs amount to €78.392 (12 classrooms), including 6 tables per classroom (2 students per table), 1 chair per person, 1 closet per 2 students, 1 locker per student, and 1 whiteboard, interactive board, and trash bin per room. Office costs are €8.038, Quiet Room costs (only tables and chairs) are €1.336, Cabinet costs amount to €10.160 (8 cabinets) and, finally, Cafeteria expenditures are €69.147, consisting of a semi-industrial kitchen (93% of the cost), 3 big tables (each one for 10 people), 30 cafeteria chairs and 2 microwaves. Bathroom/Changing Room costs are already included, following the same logic as in the other areas.

Figure 5 - Budget for *Cerâmica Semear*

Cerâmica Semear	Quantity	m2	m2 total	Total quantity	Price	67 961,16 €
Studio	1	250	250			8 371,56 €
table	12	-	-	12	132,02 €	1 584,26 €
high-standing table	8	-	-	8	123,50 €	988,00 €
chair	24	-	-	24	67,96 €	1 631,11 €
cupboard	10	-	-	10	264,78 €	2 647,84 €
white board	1	-	-	1	138,23 €	138,23 €
locker	12	-	-	12	114,00 €	1 368,00 €
trash bin	1	-	-	1	14,13 €	14,13 €
Warehouse	1	150	150	-	28 200,00 €	28 200,00 €
Ovens/Heating Area	1	50	50			31 389,60 €
industrial ceramic oven	4	-	-	4	7 847,40 €	31 389,60 €
Bathroom/Changing Room	2	10	20	-	Built In	- €

Source: Budget based on primary research over contacts with multiple companies

The costs for the most recent social business of Semear – Cerâmica Semear – add up to €67.961 in total, where they expect to have two classes of 12 students each, one more focused on teaching and the other one on working. This social business can be divided into four main sections: (i) Studio, (ii) Warehouse, (iii) Oven area, and (iv) Bathrooms/Changing Room.

For the Studio space (€36.571), Semear needs 12 tables (each table for every 2 students), 8 high-standing tables (4 of them for each class), 24 chairs, 10 cupboards (according to space availability), 1 whiteboard, 12 lockers (each unit brings two lockers), and 1 trash bin. For the other sections, they are expected to spend €28.200 on 40 medium-sized racks as storage space in the warehouse, €7.847 on 4 industrial ceramic ovens (2 ovens for each class), and the costs for the bathroom and changing room section are already included in the final total costs for this business.

Figure 6 - Budget for Common Areas

Common Areas	Quantity	m2	m2 total	Total quantity	Price	99 787,00 €
Gym	1	300	300	1	41 000,00 €	41 000,00 €
Restaurant/Bar	1	300	300	-	- €	- €
Library	1	100	100			2 785,10 €
table	10			10	125,84 €	1 258,37 €
chair	10			10	67,96 €	679,63 €
shelve	10			10	84,71 €	847,10 €
Concert Hall	1	400	400			1 537,75 €
projector and screen	1	-	-	1	1 537,75 €	1 537,75 €
chair	478	-	-	478	Built In	- €
Event Room	1	500	500		- €	- €
Medical Center	1	60	60		5 528,83 €	5 528,83 €
Outdoor Bathhouses (Campo de Jog)	2	30	60		Built In	- €
Indoor Bathhouses	2	70	140		Built In	- €
Store and Warehouse	1	260	260			8 412,87 €
computer	1			1	1 362,87 €	1 362,87 €
raks	10			10	705,00 €	7 050,00 €
General						40 522,95 €
computer	27	-	-	27	1 362,87 €	36 797,49 €
monitor	27	-	-	27	115,99 €	3 131,73 €
keyboard and mouse	27	-	-	27	21,99 €	593,73 €

Source: Budget based on primary research over contacts with multiple companies

The predicted expenditures for the common areas of the campus are €99.787 which can be divided into the following sectors: (i) Gym, (ii) Restaurant/Bar, (iii) Library, (iv) Concert Hall, (v) Event Room, (vi) Medical center, (vii) Indoor and outdoor bathhouses, and (viii) Store and warehouse.

The total costs for the library add up to €2.785, where Semear needs to have 10 tables, 10 chairs, and 10 bookcases. For the concert hall, they will only have to spend €1.537 on a projector and a screen, since this area is already equipped with 478 chairs. The medical center expenditures are €5.528, with two massage tables, one chair for blood transfusions, two stainless steel carts with drawers, two display cases, and two regular chairs. For the Store and warehouse, Semear needs a computer and 10 racks, which amount to €8.412. Regarding the rest of the sections, the Restaurant/bar is going to be granted to an external enterprise, the Gym expenditures are budgeted for costing €41.000, the Indoors and outdoors bathhouses costs are already included in the final cost for this section, and the Event Hall bears no costs since it has no fixed equipment. Finally, some of Semear's workers need technical equipment so they are budgeting their expenses for 27 workers including a computer, monitor, keyboard, and computer mouse, which amounts to €40.522.

8. Conclusion

In the end, Semear's project is vital for supporting disabled individuals in Portugal, tackling challenges such as education access, social isolation, unemployment, and poverty. To accomplish this, Semear is considering consolidating its campuses into one, which would be logistically more efficient. However, the cost of implementing this new campus is substantial – about €14.534.199. At the moment, Semear doesn't have enough funds from donations and subsidies to cover it. So, while the idea is promising, executing it poses significant financing challenges.

Looking forward, Semear hopes for robust support from the Portuguese Government and the European Union's Social Funds, particularly funds tailored to Innovative Social Enterprises, such as the FIS project. By demonstrating the importance of their work and the benefits of a unified campus, they aim to secure the necessary funds. Nevertheless, it presents a formidable obstacle.

Despite the challenges, Semear's commitment remains unwavering. In essence, Semear's vision of a consolidated campus symbolizes progress in its mission to support the disabled community in Portugal. Ultimately, while the road ahead may be tough, Semear's dedication to its cause and the potential benefits of the proposed campus expansion highlights the importance of pursuing avenues for funding and support. Despite the current hurdles, Semear remains firmly dedicated to enhancing the lives of disabled individuals and fostering a more inclusive society.

9. Limitations

Limitations regarding the estimation of financial resources are noticeable, primarily due to the preliminary phase of the project. Determining exact figures from funding sources such as the Portuguese government and the European Social Funds, alongside other potential donations, proved difficult. The project's early developmental stage posed fundamental uncertainties, hindering the ability to provide precise financial projections.

Consequently, the assessment of the project's viability is impeded by the lack of precise financial data. The absence of concrete figures regarding funding sources complicates the evaluation of its sustainability and potential for long-term success. Thus, while the project holds promise, the current limitations in estimating financial resources constrain the depth of analysis regarding its feasibility.

10. References

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11. Appendix

Figure 7 – Budget sources for Indoor Areas

Indoor Areas	Source
Warehouse	
Storage Space	Mountaings
Office	Ricardo & Vaz
table	Ricardo & Vaz
chair	Ricardo & Vaz
drawer block	Ricardo & Vaz
cupboard	Ricardo & Vaz
printer	Worten
trash bin	Ricardo & Vaz
Meeting Room	-
meeting table	Ricardo & Vaz
chair	Meetings
TV	Worten
trash bin	Ricardo & Vaz
Bathroom/Changing Room	Built-in
Kitchen/Break Room	-
big dinning table	Kaiserkraft
cafeteria chair	Ricardo & Vaz
microwave	Worten

Figure 8 – Budget sources for *Mercelandia Semear*

Mercelandia Semear	Source
Industrial Kitchen	Mundotel, ATH Equipamentos Hoteleiros, Project View
Support Warehouse	Racks
Product Handling Room	Recycled products
Bathroom/Changing Room	Built-in
Office	-
table	Ricardo & Vaz
chair	Ricardo & Vaz
drawer block	Ricardo & Vaz
cupboard	Ricardo & Vaz
printer	Worten
trash bin	Ricardo & Vaz
Cabinet	-
table	Ricardo & Vaz
chair	Ricardo & Vaz
drawer block	Ricardo & Vaz
cupboard	Ricardo & Vaz
trash bin	Ricardo & Vaz

Figure 9 – Budget sources for *Academia Semear*

Academia Semear	Source
Classrooms	-
table	Ricardo & Vaz
chair	Ricardo & Vaz
cupboard	Ricardo & Vaz
white board	Ricardo & Vaz
interactive board	Topregal
trash bin	Ricardo & Vaz
locker	Ricardo & Vaz
Office	-
table	Ricardo & Vaz
chair	Ricardo & Vaz
drawer block	Ricardo & Vaz
cupboard	Ricardo & Vaz
print	Worten
trash bin	Ricardo & Vaz
Quiet Room	-
table	Ricardo & Vaz
chair	Ricardo & Vaz
Cabinet	-
table	Ricardo & Vaz
chair	Ricardo & Vaz
drawer block	Ricardo & Vaz
cupboard	Ricardo & Vaz
trash bin	Ricardo & Vaz
Kitchen/Cafeteria	-
semi-industrial kitchen	Lisbon Subway Kitchen
big dining table	Kaiserkraft
cafeteria chair	Ricardo & Vaz
microwave	Worten
Bathroom/Changing Room	Built-in

Figure 10 – Budget sources for *Cerâmica Semear*

Cerâmica Semear	Source
Studio	-
table	Ricardo & Vaz
high-standing table	Ricardo & Vaz
chair	Ricardo & Vaz
cupboard	Ricardo & Vaz
white board	Ricardo & Vaz
locker	Ricardo & Vaz
trash bin	Ricardo & Vaz
Warehouse	Racks
Ovens/Heating Area	-
industrial ceramic oven	Mestre Brás
Bathroom/Changing Room	Built-in

Figure 11 - Budget sources for Common Areas

Common Areas	Source
Gym	Fun & Fitness
Restaurant/Bar	-
Library	-
table	Ricardo & Vaz
chair	Ricardo & Vaz
shelve	Makro
Concert Hall	-
projector and screen	Worten
chair	Built-in
Event Room	-
Medical Center	Quirumed
Outdoor Bathhouses (Campo de Jogos)	Built-in
Indoor Bathhouses	Built-in
Store and Warehouse	-
computer	-
raks	Racks
General	-
computer	Worten
monitor	Worten
keyboard and mouse	Worten