SCALING UP USER-CENTRED FUNDING MODELS VIA EU INSTRUMENTS

TRANSFERABILITY STUDY

2023

UNIC

TOWARDS USER-CENTRED
FUNDING MODELS
FOR LONG TERM CARE

SCALING UP
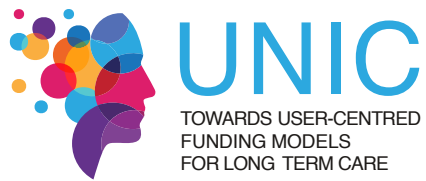# USER-CENTRED FUNDING MODELS
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EASPD | Association of Social Services Providers Czech Republic | EUROPEAN AGEING NETWORK www.ean.care | VAPH VLAAMS AGENTSCHAP VOOR PERSONEN MET EEN HANDICAP | CITIZEN NETWORK

dfi | support Inclusió social i suport en la presa de decisions Social inclusion and supported decision making | lebenshilfe Salzburg | SERVICE FOUNDATION FOR PEOPLE WITH AN INTELLECTUAL DISABILITY

Scaling up user-centred funding models via EU instruments (Transferability Study)

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LIST OF ABBREVIATIONS

DPO	Disabled persons' organizations
EU	European Union
LTCS	Long-term care and support
NGO	Non-Governmental Organisation
PA	Personal Assistance
PAB	Personal Assistance Budgets
PB	Personal Budgets
UK	United Kingdom
UN	United Nations
UNCRPD	United Nations Convention on the Rights of Persons with Disabilities

Executive Summary

The UNIC project is focused on providing support to public authorities developing user-centred funding models in long-term care and support. The project also seeks to support providers in the development and delivery of services based on this model. User-centred funding models, such as personal budgets, are an innovative way of funding and they have been gaining interest by public authorities and various stakeholders around Europe. In this model, public authorities distribute an amount of money directly to the individuals with care and support needs, helping them actively organise their own care and support services. This leads to more autonomy in decision making, control over their own lives, and active participation in the development of services.

Among the key deliverables of the project there are a report on models of good practises in user-centred funding models, a roadmap with guidelines on how to implement personal budgets, a toolbox to support different stakeholder groups involved in personal budgets delivery (people who draw on care and support, service providers, and public authorities), and transferability guidelines. The present document, the UNIC transferability study, identifies drivers and barriers for scaling up the development of personal budgets through EU instruments. The document's target audience is primarily stakeholders (public authorities, service providers, etc) interested in scaling up the personal budgets system to their own municipality, region, or country.

It presents the key perspectives and findings of the UNIC project with regard to the transferability of the personal budgets system gathered through the initial piloting in Flanders, Belgium, and subsequent transferability efforts in multiple countries (Austria, Czechia, Finland, and Spain). These findings are then related to existing EU initatives and funding programmes which can support the further scaling up and adoption of user-centred funding schemes. Finally, the document presents policy recommendations for key stakehodlers.

Introduction

The principles and rights set out in the UN Convention on the Rights of Persons with Disabilities (UNCRPD), call for a paradigm shift in the way in which care and support are provided, a shift towards home and community-based services, enabling the full inclusion of all people in the society. Accordingly, the European Pillar of Social Rights further affirms the European Union's commitments on the right to affordable long-term care and support services of good quality and in particular home and community-based services. This principle not only confirms this right, but it also clarifies how these services should be developed and provided. It emphasises the provision of care and support within home and community-based services, as opposed to segregated institutional settings.

Policy reforms in Long-Term Care and Support are required to implement the principles of the European Pillar of Social Rights and the UN Convention on the Rights of persons with disabilities. One of the most important elements is to strengthen the effectiveness and efficiency of its funding model, thus ensuring the transition towards quality, person-centred, inclusive, and community-based services. This is what the UNIC project aims to accomplish; to support public authorities in developing, implementing, and evaluating a funding model that promotes the rights of persons with long-term care and support needs. A model which empowers individuals to have more freedom, citizenship and access to their human rights, in line with the UNCRPD and the European Pillar of Social Rights.

The current transferability study seeks to identify drivers and barriers in scaling up the development of personal budgets through EU instruments. This study introduces the UNIC project and its objectives; aligns the project's aims with international and European frameworks further highlighting how such funding models can enable people who draw on

care and support in enjoying their human rights on an equal basis. It continues by introducing a step-by-step approach in scaling up personal budgets and outlining partners efforts in Austria, Belgium, Czechia, Finland and Spain in transferring knowledge and innovation in their regions/countries. Concluding with several upcoming or already established EU and international frameworks and funding programmes, supportive of the development and implementation of user-centred funding models, such as personal budgets in Europe.

The document's target audience is primarily stakeholders, such as public authorities, service providers, policy makers, among others, interested in scaling up a personal budgets system to their own municipality, region, or country.

The UNIC project and user-centred funding models

The UNIC project

The UNIC project focuses on supporting public authorities to apply a user-centred funding model in long-term care and support, while also supporting service providers develop and deliver services based on a model as such and also support in gathering the experiences of people already using these models. User-centred funding models, such as personal budgets, are an innovative way of funding and they have been gaining interest by public authorities around Europe. A model as such suggests that public authorities distribute an amount of money directly to the individuals with care and support needs, helping them actively organise their own care and support services. This leads to more autonomy in decision making, control over their own lives and active participation in the development of services.

The project consists of a report on models of good practises in user-centred funding models, a roadmap with guidelines on how to implement personal budgets, a toolbox to support people having a personal budgets, service providers and public authorities, transferability guidelines to support the transferability of the funding model and this transferability study. With the models of good practises report a general understanding of user-centred funding models is created in order to comprehend the importance and value of the project. The European roadmap underlines why it is important to move from a service-centred model to a user-centred funding model and the toolbox provides tools to put this knowledge into practice. The toolbox comprises three tools, each designed for a different target groups:

the quality monitoring tool to gather the experiences of personal budgets holders, the service delivery tool to identify strengths and weaknesses of the service provided and the compliance assurance tool for staff working in public authorities in order to evaluate possible system improvements or take the necessary steps to apply a funding model as such. The transferability guidelines create a set of theoretical and practical guidelines on how to transfer and scale up the UNIC project's outcomes while the transferability study identifies drivers and barriers for scaling up the development of personal budgets through EU instruments. All these outcomes aim to raise awareness and provide guidance to implement a user-centred funding model in different countries.

User-centred funding models

User-centred funding models are considered a radical transformation of the traditional funding models. Traditionally, public authorities directly fund service providers, through reserved markets or public procurement and this model has the tendency to dominate and limit the choice and control of individuals with care and support needs. On the contrary, user-centred funding models, allow room for flexibility when designing and providing services, are tailored to the needs of each beneficiary and providing the needed support to individuals when planning and using their chosen services. A funding model as such stipulates a shift in power, which is placed in the hands of each individual, giving users more choice and control over the care and support they receive, allowing them to meet their individualised needs, wishes and preferences and to live their lives as they want.

User-centred funding models are seen as a way to empower persons with long-term care and support needs to have more freedom, citizenship and
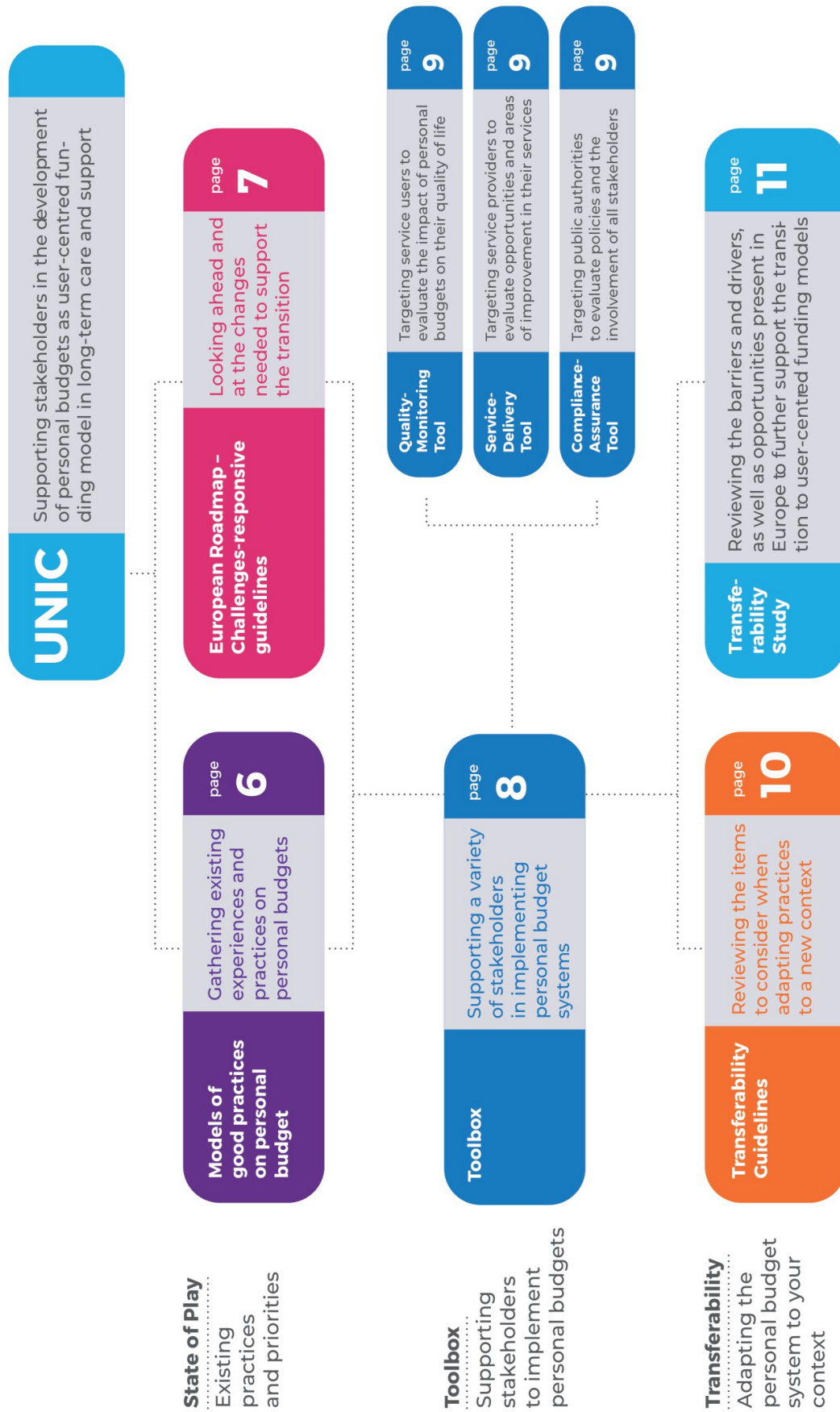
access to their human rights, in line with the UNCRPD and the European Pillar of Social Rights. An example for this is the concept of personal budgets. Personal Budgets is an amount of funding which is allocated to an individual by a state body so that the individual can make their own arrangements to meet specified support needs. Multiple examples exist already as this innovative model is implemented in the UK, Flanders (Belgium), Italy, Sweden and most recently in Latvia. As well as several pilot projects exist in Austria, Finland and Spain serving as an important reminder that any change starts from small steps and pilot projects are an important instrument in testing and planning social innovation. However, pilot projects should not be discontinued after their successful implementation but efforts and adequate planning shall be made in advance to ensure the continuation of a reform through national or regional funds.

Outputs and Impact

The project outputs show significant evidence that this reform is providing persons with long-term care and support needs with far more choice and control over the care and support they need. Therefore, leading to the diversification of the service offering and increase of services which respond to the real needs of citizens through a bottom-up approach to decision making. Yet, even with clearly positive impacts on the lives of budgets holders, there continues to be difficulties linked to the implementation of personal budgets, a challenge which continues to have a limiting effect on the ability to scale-up personal budgets across Europe. UNIC aims to support public authorities to implement a user-centred funding model to achieve best results for people with care and support needs to benefit of their rights to a full extend.

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UNIC OUTPUTS FLOWCHART

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Supporting stakeholders in the development of personal budgets as user-centred funding model in long-term care and support

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Catalysing change through the transferability of social innovation

User-centred funding models, such as self-directed support and personal budgets are seen as a good vehicle for supporting persons with long-term care and support needs to exercise their rights under the UN Convention on the Rights of Persons with Disabilities. These models are considered social innovations because they shift the power and the way people with care and support needs are perceived. They give people power to choose and design their own support and services. On a broader scale, this means an international paradigm and power shift in the roles of the public authorities, service providers and the people who draw on care and support. This leads to the social empowerment of people and thus creates a new social paradigm and this applies both to the people with care and support needs as well as the professionals and the policy makers.

User-centred funding models need a system change. The crucial component of successful system change is scaling-up the innovation in a co-creative way, together with the people for whom the system and services are for. Transferability rarely occurs automatically: it requires vision, collaboration, resources, processes, research, and experts by experience. At the same time, as it is important to focus on what to scale (like self-directed support and personal budgets), it is also important to think how to scale up. Focusing on how to scale up can improve the skills in communities to experiment and innovate together. This needs a strong focus on citizenship, participation and involvement of people which are the fundamental elements of change.

We need to enable dialogue for the replication of practical know-how from

people to people, from one community to another. There is a clear need to speed up the change in paradigm in long-term care and support, as recognised in the UNIC-project report "Challenges responsive guidelines: Roadmap on User-Centred Funding Models for Long-Term Care."
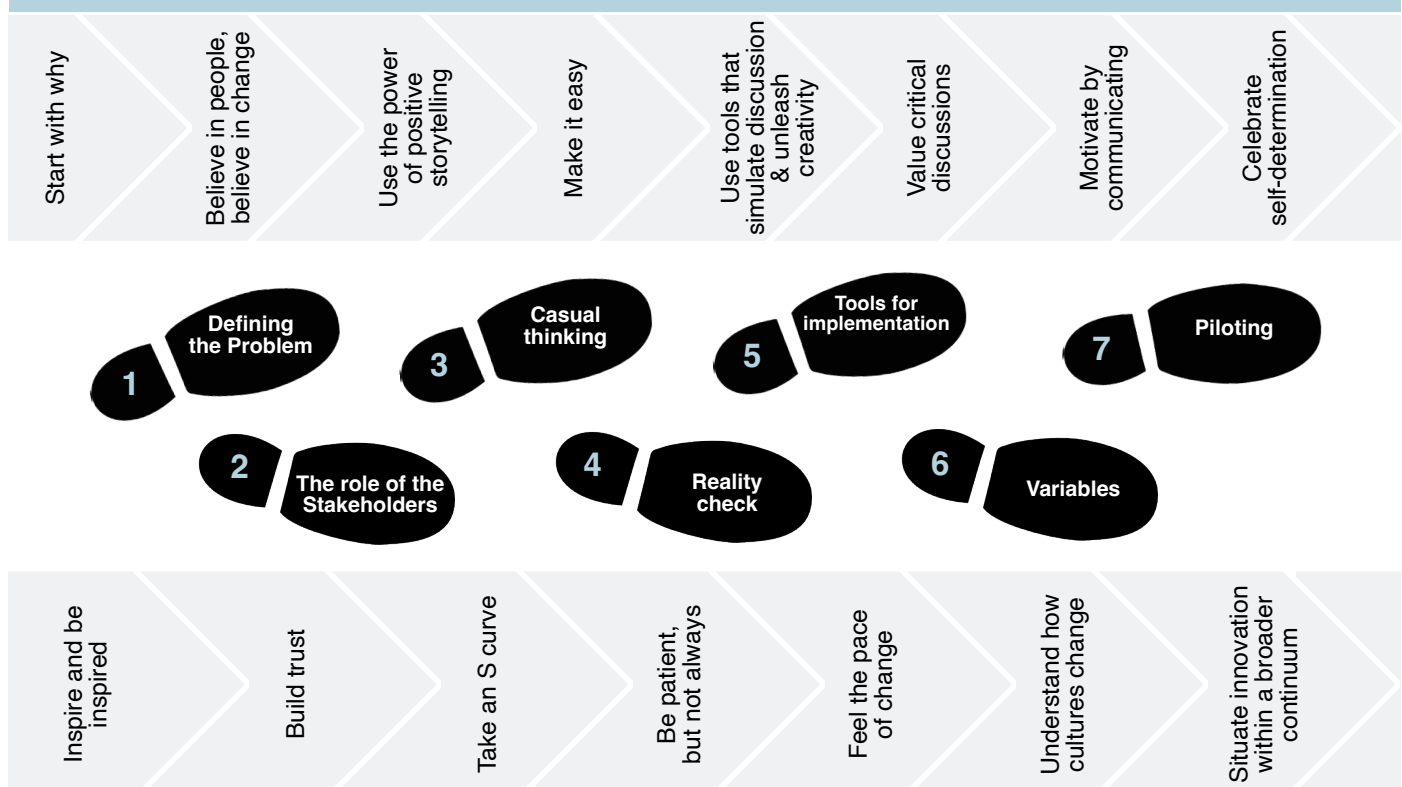
The questions are:
1. **HOW TO SPEED IT UP?**
2. **HOW TO CATALYSE CHANGE? HOW TO TRANSFER CHANGE?**

Transferability is a process that needs a step by step approach, which starts with the question **WHY**.

Step 1: Defining the problem: Start with why

STEP *by* STEP - Why and how to catalyse change

Defining the problem is often the first step of the transferability process, but the problem should not be seen only as a problem, but as the catalyst for action: Why do we do this? What is the purpose of this? Why is this change important? Why is the change so urgent?

Social change and scaling-up innovations are never done alone. That is why we need networks and communities to promote the change: persons with care and support needs, their families, public authorities, NGOs, service providers, entrepreneurs etc. When developing long-term care and support systems it is all about human rights as a driver for the system change. During the process of "why", we need to examine our own system values to be able to accelerate innovations and change. Substantial change is possible only if we unearth the values and assumptions beneath our work and open them up to ongoing critiques, because if we don´t, we end up reproducing the same power dynamics and outcomes.

Step 2: The role of the stakeholders

The role of the stakeholders is essential in transferring social innovations. In the social sector's development activities, this is often referred as co-creation or co-production. It is described as an inclusive working practice between experts by experience, their families, organisations providing support, public authorities, and other stakeholders. Co-creation networks need human, accessible and inclusive ways of working and problem-solving needs to get the multidimensional information.

How to make it happen in real life?

By making it easy, believing in people and by using the power of positive storytelling.

Build trust

Creating trust is surely a question of how, which is a natural continuum to the question of why and it is crucial to identify ways to build trust in different networks, cultures, communities and organisations. Building trust between people may be a short or a long process but carrying out a common mission and achieving a vision is difficult without it. The whole idea of personal budgets is based on the trust because it shifts the point of decision making closer to the person who needs support and to those who support them and enable them in choosing their own support arrangements. There are many ways to build trust, but the most important thing is to understand its significance. Creating trusting relationships in the networks we need to strengthen the idea that each citizen is as important and that everyone has an important role in the communities.

Find the change makers, connect people

We need to focus on who the changemakers (innovators and early adopters) are, but that is not enough. Successful social change depends on many people, who are committed to taking change forward. Achieving the level of maturation requires communities to be able to also achieve policy and system change, and because it´s a long process, we should identify the needs of the changemakers: What kind of support change makers need to be able to create wider impact?

UNIC-project is promoting change also at the horizontal level. Transferability of a user-centred funding model includes thus a wider perspective than just disability services. It is a system change of long-term

care and support. The difficulty is that public authorities in different sectors at the horizontal level do not necessarily work in the same networks. It would be difficult, for example, to create changemaking networks that combine local and regional levels, or international, national, and local level development activities. It can be difficult to find ways to create networks between the actors in elderly people´s support and services and disability services. The challenge in the transferability is that it can be fairly simple to find the local change-makers or the change-makers in some specific sector, such as the disability sector, but difficult to identify the changemakers that can combine local and regional levels; or disability and homeless people´s sectors. So, who are the change-makers in long-term care and support that can combine different sectors and people?

Step 3: Casual Thinking

Make it easy

Our systems are filled with complex terms, and forms and any social service system and support model are difficult to navigate for many of us. The first and most important thing to accelerate change is to make it easy – both practical and emotional, even if the processes seem sometimes difficult. We need to encourage and allow people to be creative and make participation easier for many, using accessible methods of communication. In co-creation processes, the purpose is that people work together towards a common goal and we must make systems and process accessible to all to ensure equal participation and that the voices of people are heard.

Making it easy also means recognising people's emotions: power relations between people and organizations, fear of change, enthusiasm for something new, feelings of losing control, feelings of power, insecurity about one's own state, difficulty of being understood or joy of working

together. Making people feel welcomed and appreciated, offering them a safe space to be heard, is important for anyone. This is how to ensure equal participation and co-creation of a new vision for the future.

Believe in people, believe in change

While it is necessary to define problems, it is also necessary to create a positive mindset, vision, and collaboration to be able to see the possible solutions. In co-creation processes it is crucial to believe in people and believe in change, as a positive change can only be made by strengthening the capacity of people and communities. Change does not happen through top-down policies or individual heroes, that helps, but the successful change needs communities and people. Co-creation processes must always start from the fact that experiments must increase the feeling of being part of a community and strengthen relationships between people.

Use the power of positive storytelling

Positive storytelling can catalyse discussion and actions and it does not mean that the story should be positive or that we should avoid critical discussions. On the contrary, positive storytelling is a perfect tool to discuss about problems or complex needs because the focus is on a solution-oriented discussion and encouragement to act. To be able to achieve this there is a strong need to focus on the positive changes we can achieve together.

Step 4: Reality Check

Be patient, but not always

Organisations have their own values, principles, and guidelines. When developing networks it is impossible to combine all these different values

and principles, but sometimes people might feel that they need to stick to their own ways of working. That is why we need to encourage critical discussions and examine our values to be able to create something new together or to find common ways of doing things better together.

System change creates tensions, because our organisations and processes are often built around stability: organisational charts, specific roles, reporting duties, evaluation methods, standards and rules. Stability nurtures the existing good things in the systems and that is why it is necessary to identify what needs to be maintained during change and what needs to change.

Innovations and change require time, effort and resilience to failure. Processes of scaling-up innovations are processes of learning and understanding. Time must also be given for people to learn from the previous ways of doing thing. And in many cases, systems do not change from one to another overnight, but parallel systems are created and/or a combination of systems.

Step 5: Tools for implementation

Co-creations and transferring innovations require tools and motivation to use them. The tools - be they paper, digital, thinking aids or group work - help achieve concrete results, stimulate discussion, process tasks, create new ideas, unleash creativity, identify risks and finding new ways of doing things. Tools for implementation can be selected according to the 3-A principle:

- Accessible: tools should be accessible for all, to allow people to participate

- Adaptable: tools should be adaptable to different cultures,

organisations, and situations

- Adorable: tools should be adorable – something that motivates people to use them

The UNIC-project tools for example are designed with the 3-A principle, so as to help public authorities design and implement user-centred funding models, help people who draw on long-term care and support (LTCS) evaluate these funding models, as well as service providers on how to move to person-centred support systems.

Step 6: Variables

Scaling-up innovation is a process with plenty of variables, depending on the people, communities, societies, and cultures involved.

Scaling-up processes can be complex with many 'moving parts' that need managing and attention. There may be variables in resources, energy, partnerships, work styles, skills, commitment etc. Important points to address during processes can be:

- Have you identified and understood the likely differences between partners, cultures, and communities? Have these been incorporated into the scaling strategy?

- Is there a consensus across all partners on the expectations, aims and goals?

- Has the scaling-up of the innovation been situated within a broader continuum of services or practices of the setting(s)?

Understanding these different cultures and variables will not result in easy answers or precise methods, but they can be powerful tools for achieving social change.

Step 7: Piloting

Motivate

When piloting social innovation, we need to first identify what is motivating the people with whom we work with. Every person or organisation has his own motives, which drive them forward. Those motives could be very different, so if we want to make changes, we need to think about the motives of others. These mixed motivations make piloting social innovations challenging, but at the same interesting, because they describe the complex system change. To really achieve the maturity level for the social innovation we must be able to combine the different motives to make it a reality.

Celebrate self-determination and motivate by communicating

Human beings are active, motivated, and self-guiding. People do not solely pursue their own interests but want to engage with others. It's not important how much the person is motivated, quality is what matters. If we want to inspire other people to pilot actions, we must ensure that the environment supports their voluntariness. Persons can use their skills and they are part of these active communities.

The UNCRPD, the European Strategy for the Rights of Persons with Disabilities (2021-2030), the EU Care Strategy and the UN Guidelines on Deinstitutionalisation aim to ensure that persons with long-term care and support needs enjoy their human rights and have equal opportunities. For many people with LTCS needs, social services are enabling them to enjoy those rights - or making it more difficult. Service systems are often perceived as obscure or bureaucratic, but there are many good and promising practises across Europe on how to develop systems differently.

Human rights, citizenship, participation, involvement of people with long-term care and support needs and their families, individualised services and person-centered ways, such as personal budgets to organize services are the fundamental elements when developing support systems. It is crucial to think about what kind of support systems we are developing in Europe and how can persons who receive long-term care and support be actively participating in organizing their own support, based on their individual needs and preferences.

Scaling up personal budgets - Key findings from regional and national workshops and action plans

During the UNIC project one of the goals was to transfer knowledge and innovation through workshops implemented in different countries and regions. More specifically, workshops were held in Czech Republic, Austria, Finland, Spain and Belgium. The key result of these workshops was to develop Action Plans for the future deployment of user-centred funding models across different organisations, regions or countries.

Three workshops were held in each country/region by the UNIC-project partners focusing on different stakeholders, such as persons with disabilities, their families, personal assistants, service providers, public authorities and other relevant organisations. Despite the fact that the goal and the focus groups were the same for each country, it was important to allow enough room for flexibility based on the way that services are organised in different countries (regional, municipal, national etc), on the focus and expertise of each organisation responsible for organising the workshops, as well as on the state of play of development of user-centred funding models in each one of these countries.

In **AUSTRIA** and specifically in **SALZBURG**, there is already a good practice of personal budgets and personal assistance implemented which however, requires legal entitlement and broader access to reach higher stages of development. In July 2022 a national disability action plan was adopted with a regional action plan in Salzburg coming in 2023. In December 2022, the national government announced a pilot project on personal assistance

that will be implemented in Salzburg, Vorarlberg and Tirol regions, which will also aim to harmonize the personal assistance model across Austria with a budgets of € 100 million for the next two years. This is a milestone in disability policy and a great example to showcase regional initatives on improving access to and quality of personal budgets and personal assistance systems. It will include more target groups, ensure quality, simplification of procedures and improvement of working conditions of the personal assistants. The personal budgets for personal assistance are split between regional and national level and regulations for access and use vary considerably across regions. Challenges that will both be addressed by the pilot project which will be implemented in the next two years.

In **THE CZECH REPUBLIC**, which is one of the partner countries they held 4 workshops in total, there is already a cash allowance system in place which can be perceived as a type of a user-centred funding model. It is provided monthly as a direct payment and is allocated to each individual who, due to care and support needs, depends on another person's assistance for participating in daily living activities. It can be used for services provided both from a licenced provider but also from an informal carer. And it is based on the level of care and support needs of each person, falling in 4 different categories. Based on the experience of the project partner in Czech Republic, the modification of the current system and the implementation of personal budgets would consist of dividing the beneficiaries of the current care allowance into two groups. The first group would be elderly and the second would be children and adults with disabilities. The reason for this division is that the volume and structure of the needs of the elderly is relatively homogeneous, while the needs of people with disabilities are very diverse. Thus, children and adults with disabilities could benefit from a pure personal budgets system and elderly from a modified scheme of the existing care allowance. The project partner further engaged with the Ministry of Labour and Social Affairs of the Czech

Republic to present the project and the user-centred funding model with the goal to further promote it's implementation.

In **FINLAND**, the threat at the moment concerning the implementation of user-centered funding models is a certain kind of static in development activities: in 2023 the new "wellbeing services counties" ("hyvinvointialueet") were launched, the current government program is coming to an end, the parliamentary elections will determine the future, and the reform of the Disability Services Act will be implemented during 2023. From the point of view of personal budgeting, it is important to further promote the transition to human rights-based service systems and user-centered approaches, as well as the expertise in one's own life. An activity called Suunta (Direction) - Personal Budgeting Center is maintained by the project partners in Finland. This activity offers an opportunity to share information and experiences and thereby increase common understanding on personal budgets. It is important for the project partner to maintain networks with important actors in society, such as the Finnish institute for Health and Welfare (THL), which also maintains a "Network of disability services" and reaches a lot of professionals in the field. Efforts are also made to influence Soste – the Finnish Federation for Social Affairs and Health. The Future Disability Services Act will approach the organisation of services from the perspectives of promoting inclusion and responding to support instead of the previous diagnosis-oriented approach. The Disability Services Act contains some elements of the personal budgets, e.g. in terms of mobility support, and in spirit promotes goals in the background of personal budgets. Next, it is important to develop the system in such a way that the new Disability Services Act and the operating model of personal budgeting together promote a good, individual life for people who need support in the best possible way. Fact, further demonstrated by a joint initiative of 19 NGOs in Finland advocating for the introduction of personal budgets.

In **BELGIUM** and specifically in **FLANDERS**, the system of personalised funding is based on the principle of concentric circles: the strengths and possibilities of the person with a disability, informal care within the household, the help of family, friends and acquaintances, regular professional help and disability-specific resources and support reinforce each other where possible or necessary. After extensive piloting during 2022 of the project's outputs, it was important to further refine the three tools so that they are fully operational for actual implementation in the Flemish policy context. In line with the vision of the UNIC project, the project partner in Belgium wants to approach this again in a participatory way with input from different stakeholders. The main outcome of the piloting was the broad appreciation from various target groups about the potential added value of the tools for assessments and evaluations of the personal budgets system in their working and living environments. The tools are particularly acknowledged for their approach from the perspective of human rights and quality of life. However, the piloting also showed that further optimization and finetuning of the tools are necessary to fully fit the Flemish context. The project partner in Belgium proposes to increase the focus of the person-centered system in Flanders on enabling human rights and quality of life. After the transition to a person-centered system in Flanders in 2017, the project partner is now planning a broad and in-depth evaluation of the system. In this evaluation, the aim is to gather as much input as possible from persons with disabilities, service providers and the government on how we can optimize the system of person-centered financing. The UNIC toolbox will be given a central place to help shape that evaluation.

The **SPANISH & CATALAN** action plan is conceptualized as a strategy designed to ensure that innovative approaches and policies can be implemented in different contexts and replicated in other communities or geographic areas and developed as a pilot initiative through a project

named «My Personal Budget: My Independent Life». The project converges both the UNIC project learning outcomes and deliverables with the different strategies and policies articulated by the Spanish Government. At the state level the «Spanish Strategy on Disability 2022-2030» drawn up by the Ministry of Social Rights and Agenda 2030 and approved by Council of Ministers on May 3rd 2022 and the «Spanish Deinstitutionalization Strategy» currently in a development phase by the same ministry and, at a Catalan level by the «Catalan Government Plan of the XIV legislature» approved by the Catalan Government on July 13th 2021, the «Social Services Strategic Plan 2021-2024» of the Department of Social Rights from 2019 and the document «Promotion of autonomy and care for people with long-term support in the community in Catalonia: Recommendations to promote the new model» of the same department, published in 2021. The action plan, shapeshifted as a pilot project serves as a versatile and all-around document that can help public authorities and relevant stakeholders to push central, regional and local authorities to implement a similar initiative in the multi-layered political and decision-making landscape currently existing in Spain.

Through the workshops in these countries project partners were also able to identify some core elements for the short and long-term system development:

• Clear entitlement and funding, such as legal entitlement, sufficient resources, good information and processes are required to be in place to ensure the implementation of an adequate user-centred funding model.

• A support system is required enabling equal participation, based on personal wishes and human rights, choice and orientation on personal wishes, deinstitutionalisation and needs-based development. One system across a country, easy access (One-Stop-Shop) and good

counselling options will ensure equal access to this model for all people with care and support needs.

- A system of support/ assistance, which is individual, based on needs and wishes, with dignity and respect, support agreements, and evaluation of quality will ensure a less buraucratic funding model and ensure a smoother uptake from the people themselves.

- A needs-based personal budget, esuring participative assessment, which is not based in medical evaluations, peer-support and sufficient resources can tackle the challenges identified in different countries, where personal budgets are not adequate to meet individualised needs and wishes.

- Personal budgets should be available for persons with all kinds of disabilities and other target groups (e.g. older adults).

- Working conditions (salary, training, supervision) and the job profile must be improved for easier staff acquisition and quality of support.

- In order to ensure a successful development and adequate to the needs and wishes implementation:

  - the topic must gain more presence in political discussions at regional and national level.

  - policy guided also by research, collection of information, participation and cooperation with all relevant stakeholders.

  - pilot projects should be implemented to try out innovative approaches and an initial experimentation will allow people to try out personal budgets during pilot projects.

  - UNIC-tools should be used for systematic development.

Scaling up personal budgets through European Instruments

Rationale

The purpose of a user-centred way of funding and organising services is about supporting people to live independently and be included in the community, ensuring choice and control over the decisions affecting their lives and the full enjoyment of their human rights. Personal budgets can be seen as a tool to give people who draw on care and support control over how their support is organised and who provides it. Therefore, it should not be simply considered as another funding model but as a model establishing a shift in power, where power is placed in the hands of the individual, giving people more choice and control over the care and support they receive. This further allows them to meet their individualised needs, wishes and preferences and to live the lives they want to live.

Several upcoming or already established EU and international frameworks are supporting or can support the development and implementation of user-centred funding models, such as personal budgets in Europe.

The UN Committee on the Rights of Persons with disabilities recently adopted the Guidelines on Deinstitutionalisation, including in emergencies, calling for individualised and direct funding provided to persons with disabilities. This should allow people with disabilities and other support needs basic income security and cover health-care and disability-related costs, in accordance with their will and preferences. Also, in the recent publication of the Special Rapporteur on the Rights of Persons with Disabilities on the Transformation of Services, personal budgets have been

recognised as a promising approach and different examples from different countries are presented highlighing the opportunities and challenges identified.

Moreover, the European Pillar of Social Rights and specifically Principle 18 further reaffirms the right of everyone to affordable long-term care services of good quality, in particular home-care and community-based services and it supported in launching the EU Care Strategy. The latter is a strategy aiming to improve the adequacy of social protection for long-term care and support, ensure a quality framework, address the challenges of domestic and migrant care workers, tackle skills and labour shortages, support informal carers and improve the fiscal sustainability of the sector. Despite the fact that in the EU Care Strategy there is no direct mention of user-centred funding models, such as personal budgets, the UNIC project through UNIC's challenges responsive guidance has addressed all the above-mentioned elements. This UNIC guidance further identifies how all these elements, which are the main challenges of long-term care and support, can be overcome through the development of user-centred systems and funding models.

In spite of the ratification of the UNCRPD, within the EU, which further reaffirms the right of persons with disabilities to live independently and be included in the community, in most countries many persons with disabilities, and older people with care and support needs, are still living in institutional, segregated and congregated environments and this is also recognised in the EU Disability Strategy on the Rights of Persons with disabilities (2021-2030). This Strategy further identifies the need for a different landscape of support that can allow people with disabilities, old and young, to enjoy their right to live independently and be included in the community, with choices equal to those of others about their place of residence and with whom and how they want to live. For this reason, within

this year, the Commission will issue a guidance with recommendations to Member States on how they can enable persons with disabilities and older people to live independently and be included in the community. User-centred systems and funding models are about supporting people to live independently and be included in the community, are about citizenship, choice and control and can further support Member States in the transition from institutional to community-based and person-centred forms of support.

Lastly, the EU Care Strategy pushes for improvements in the quality of long-term care and support services, specifically looking into the impact of services on the quality of life of the people who draw on these. The Strategy further highlights the importance of person-centred approaches and the need for greater integration between care and healthcare services. It further explains that person-centredness entails offering a choice of services in line with people's needs and fostering the transition from institutional care to home care and community-based services. All elements that can be accomplished with the introduction of user-centred funding models. In addition to this, one of the flagships initiatives of the EU Disability Strategy is the development of a quality framework for services for persons with disabilities by 2024, namely the EU Framework of Social Services of Excellence. This framework will aim to improve service delivery for persons with disabilities and to enhance the attractiveness of jobs in this area. User-centred systems and funding can radically change the focus of quality away from bureaucratic, standarised assessments and inspections towards outcome-oriented approaches, looking at the impact that each service has on the quality of life of the people it supports.

European Funding Programmes

In chapter 3, on catalysing change through the transferability of social innovation, such as user-centred systems and funding, we identified that transferability rarely occurs automatically and one of the elements that it requires is resources. This section will look into available financial resources and especially EU funding programmes that can further encourage the transferability of user-centred funding in the EU Member States.

The [2021-2027 Multiannual Financial Framework and the Recovery plan for Europe](#) (Next Generation EU) is financing the European Union's funding programmes. More than half of [EU funds](#) are channeled through the five Cohesion Policy Funds, and the 2021-2027 programming period focuses on a more social and inclusive Europe, among other objectives. This objective further supports initiatives for the transition from institutional to community-based services. As previously mentioned , user-centred systems and funding models can further support Member States in the transition from institutional to community-based and person-centred forms of support, since they are about supporting people to live independently in the community, about inclusion, citizenship, choice and control. Therefore, the below mentioned funds can be further used to support initiatives in this field:

European Social Fund +

The [European Social Fund+](#) (ESF+) is the EU's main instrument for investing in people and one of the five Cohesion Policy Funds. It aims to build a more social and inclusive Europe and contribute to the implementation of the European Pillar of Social Rights. One of the goals of this programme is to promote social innovation through the ESF+ Employment and Social Innovation strand, which was also the programme which funded the UNIC project.

European Regional Development Fund

The European Regional Development Fund (ERDF), one of the five Cohesion Policy Funds, aims to strengthen economic, social and territorial cohesion in the European Union by correcting imbalances between its regions. Among the funding priorities in the programming period 2021-2027, there are investments to make Europe more social, supporting effective and inclusive employment, education, skills, social inclusion and equal access to healthcare, among others. This funding programme can be used for investments in infrastructure, investments in access to services, equipment and software, and technical assistance.

Technical Support Instrument

The Technical Support Instrument is designed to provide tailor-made support to Member States to design and implement reforms. It is an EU programme that does not require co-financing from the Member States and it can be used in any stage of a reform, from the design to the implementation phase. The support offered can take the form of, for example, strategic and legal advice, studies, training and expert visits on the ground. Member States can ask for support for reforms relevant to the labour market, education and social services, including healthcare, welfare and childcare, among others. It is important to note that this instrument finances the expertise required in Member States and not the actual reforms, which can be covered through different EU funding programmes.

Erasmus +

The Erasmus + is an EU funding programme to support education, training, youth and sport. One of the main focuses of the 2021-2027 programme is social inclusion. This Erasmus + can support the enhancement of knowledge, skills and attitudes through the different programmes it includes. The Inclusion and diversity programme focuses on people with

fewer opportunities, such as people with disabilities, those living in rural and insular areas etc. The Erasmus + mobility can offer opporunities to more than 10 million individuals from different sectors to participate in activities in different Member States to exchange knowledge and expertise. Lastly, 30% of the budget will be invested in cooperation projects and policy development activities, fostering collaboration and exchange of innovative practices among Member States. The programme will further provide support to policy development, contributing to national reforms and modernisation in the fields of education and training, among others.

Citizens, Equality, Rights and Values Programme (CERV)

The [CERV programme](#) aims to protect and promote Union rights and values as enshrined in the EU treaties and the Charter of Fundamental Rights. One of the funding strands of this programme is on Equality, Rights and Gender Equality, further supporting projects respecting the principles of non-discrimination, the rights of the child and of persons with disabilities for their active inclusion and full participation in the society, among others.

Horizon Europe

The [Horizon Europe](#) is the EU's key funding programme for research and innovation with a budget of 95.5 billion. The programme facilitates collaboration and strengthens the impact of research and innovation in developing, supporting and implementing EU policies while tackling global challenges.

Policy Recommendations on the use of EU funding programmes

Based on the work accomplished within the UNIC project, the transferability actions, such as the workshops implemented in different EU countries and the action plans designed for each one of these countries, the UNIC partners have identified the following key policy recommendations on the use of EU funding programmes for the scalability of user-centred funding models:

- **COHESION POLICY FUNDS, SUCH AS ESF+ AND ERDF** are instruments that can be used to support progress towards independent living and inclusion of persons with disabilities. In the EU's programming period 2021-2027 at least 25% of the ESF+ resources of all Member States should go to social inclusion projects, such as projects that further promote independent living and inclusion in the community as deinstitutionalisation processes, user-centred funding models etc. The predecessor of ESF+ (ESF) has been used by multiple Member States to pilot personal assistance systems for persons with disabilities, such as in Croatia, and can also be used to pilot the implementation of personal budgets. In order to fully use the potential of these funds, ESF+ and ERDF can be used in synergy, where ESF+ can, for example, be used to (partly) cover staff costs of personal assistance, and ERDF can support equipment and social infrastructure. These funds can also be used to provide support to persons with care and support needs on how to manage their personal budgets.

- **THE TECHNICAL SUPPORT INSTRUMENT** provides Member States with the opportunity to receive tailor-made support to design and

implement reforms, among which user-centred funding models. Any reform needs to be accompanied by a strategy, setting up the appropriate vision, and an action plan, operationalising this vision. Under this instrument, the new flagship project "Towards person-centred integrated care", as communicated in the EU Care Strategy, can facilitate reforms in line with the proposal for a Council Recommendation on access to affordable high-quality long-term care. This flagship project can help Member States, upon demand, design and implement reforms that will put the person at the centre of services to ensure better access and better quality of care at every stage of life.

- Any reform needs to be accompanied by a **WELL-TRAINED WORKFORCE**. Member States should invest in training social services workforce, as continuing professional development will make the sector more attractive and ensure a rights-based approach to long-term care and support. The Erasmus+ funding programme can be supportive to reach this objective.

- User-centred funding models support a shift in power, where power is placed in the hands of each individual, giving users more choice and control over the care and support they receive, allowing them to meet their individualised needs, wishes and preferences and to live their lives as they want. Member States should invest in programmes and reforms further supporting legal capacity of persons with disabilities and other care and support needs. The **CERV PROGRAMME** can be supportive of initiatives as such.

- The funding programmes mentioned above can also be used to support the **DEVELOPMENT OF PILOT PROJECTS** of user-centred funding models and other reforms relevant to the process of deinsitutionalisation. However, any pilot project should not be discontinued after its successful finalisation. Adequate planning and

transition to national funding should be planned to ensure its continuation.

- Under the upcoming **HORIZON EUROPE PARTNERSHIP 'TRANSFORMING HEALTH AND CARE SYSTEMS',** a knowledge hub will be created for innovative technologies and digital solutions in health and care provision. As communicated in the EU Care Strategy, the hub will support assessment and transferability of good practices and act as a community-building and exchange forum. Complementing this, funding for research and innovation for person-centred care, such as user-centred funding models, and uptake of digital solutions will be available under the Horizon Europe and Digital Europe programmes.

- Lastly, **EU FUNDS SHOULD NOT BE USED FOR THE DEVELOPMENT OF OUTDATED INFRASTRUCTURES, SERVICES AND POLICIES** that can lead to the further segregation of people with care and support needs from the community. Even if the Multi-Annual Framework 2021-2027 cannot be used to fund or renovate residential institutions, there have been instances across different Member States where funds have been allocated for this purpose. For this reason, the European Expert Group on the transition from institutional to community-based care has developed an EU funds checklist to promote independent living and deinstitutionalisation. This checklist, together with UNIC's outputs, will support Member States to design and implement reforms that will put persons with care and support needs at the centre of planning, giving them more choice and control over the care and support they receive, allowing them to meet their individualised needs, wishes and preferences and to choose the life they want to live. Among these reforms, those aimed at ensuring a user-centred way of organising and funding care and support are particularly crucial.

Glossary

PERSONAL BUDGETS (PB) - Individualised Funding which is (a) transparent to the person (b) which can be manage directly or with assistance and (c) which can be used flexibly.

SELF-DIRECTED SUPPORT (SDS) - A total system of funding, decision making, advocacy, and practical support designed to ensure all people who need support can direct that support.

SOCIAL INNOVATION - Social innovation refers to the design and implementation of new solutions that imply conceptual, process, product, or organisational change, which ultimately aim to improve the welfare and wellbeing of individuals and communities.

INCLUSION - is the principle underlying Art. 19 UNCRPD (Living independently and being included in the community), which refers to a person's right to live and participate in the community, with choices equal to others.

INDEPENDENT LIVING - The principle underlying Art. 19 UNCRPD (Living independently and being included in the community), which refers to a person's right to choose their place of residence and where and with whom they live on an equal basis with others. To guarantee this, states have to provide access to a range of in-home, residential and other community support services, including personal assistance necessary to support living and inclusion in the community and other community services and facilities, such as accessible transport. Independent living, Equal right of persons with long-term care and support needs to live in the community, with choices equal to others.

KNOWLEDGE BROKERING - Knowledge brokerage is usually viewed as an intermediary activity that bridges the divide between knowledge

producers and users. Knowledge brokers can be individuals or organisations who facilitate knowledge exchange or sharing between and among various stakeholders (for example, researchers, policymakers, and practitioners).

LONG-TERM CARE AND SUPPORT (LTCS) - Support people need to enable independent living and to be safe, well and fully involved in the life of their community, whatever their support and care needs. Home and community-based services are the types of services needed to implement this definition.

TRANSFERABILITY - If something is transferable, it can be passed or moved from one person or organization to another and used by them.

SCALING-UP – What is being scaled can be broad, big, and complex or specific, small, and simple. Scaling can include policies, systemwide innovations, methodologies, services, tools etc. Being evidence-based is the most common requirement for an innovation to be scaled-up.

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Executive summaries (translations)

Shrnutí

Projekt UNIC se zaměřuje na poskytování podpory orgánům veřejné správy při vytváření modelů financování dlouhodobé sociální péče a podpory zaměřených na uživatele.

Projekt se rovněž snaží podpořit poskytovatele při rozvoji a poskytování služeb založených na tomto modelu. Modely financování zaměřené na uživatele, jako jsou například osobní rozpočty, představují inovativní způsob financování a v poslední době se těší zájmu orgánů veřejné správy a různých zúčastněných stran v celé Evropě. V tomto modelu veřejné orgány rozdělují určitou částku peněz přímo jednotlivcům s potřebou péče a podpory a pomáhají jim aktivně organizovat vlastní služby péče a podpory. To vede k větší samostatnosti při rozhodování, kontrole nad vlastním životem a aktivní účasti na rozvoji služeb.

Mezi hlavní výstupy projektu patří zpráva obsahující příklady dobré praxe v oblasti financování dlouhodobé péče prostřednictvím modelů zaměřených na uživatele, plán s pokyny, jak zavádět osobní rozpočty, soubor nástrojů na podporu různých zúčastněných stran zapojených do realizace osobních rozpočtů (osoby, které čerpají péči a podporu, poskytovatelé služeb a orgány veřejné správy) a pokyny pro přenositelnost. Tento dokument, studie přenositelnosti UNIC, identifikuje hnací síly a překážky pro rozšíření rozvoje osobních rozpočtů prostřednictvím nástrojů EU. Cílové publikum dokumentu jsou především zúčastněné strany (orgány veřejné správy, poskytovatelé služeb atd.), které mají zájem o rozšíření systému osobních rozpočtů ve své obci, regionu nebo zemi.

Představuje klíčové perspektivy a zjištění projektu UNIC s ohledem na přenositelnost systému osobních rozpočtů, které byly shromážděny v rámci počátečního pilotního testování ve Flandrech v Belgii a následných snah o přenositelnost ve více zemích (Rakousko, Česko, Finsko a Španělsko). Tyto poznatky jsou následně vztaženy ke stávajícím iniciativám a financování prostřednictvím programů EU, které mohou podpořit další rozšiřování a zavádění systémů financování zaměřených na uživatele. V závěru dokumentu jsou pak uvedena politická doporučení pro zúčastněné strany.

Kurzfassung

Das UNIC-Projekt konzentriert sich auf die Unterstützung von Behörden bei der Entwicklung von nutzerzentrierten Finanzierungsmodellen für die Langzeitpflege und -betreuung.

Weiterhin soll das Projekt, Anbieter bei der Entwicklung und Bereitstellung von Dienstleistungen auf der Grundlage dieses Modells zu unterstützen. Nutzerzentrierte Finanzierungsmodelle, wie das Persönliche Budget, sind eine innovative Art der Finanzierung, die bei Behörden und verschiedenen Interessengruppen in ganz Europa auf Interesse stoßen. Bei diesem Modell stellen Behörden Personen mit Pflege- und Unterstützungsbedarf einen bestimmten Geldbetrag zur Verfügung und helfen ihnen, ihre eigenen Pflege- und Unterstützungsleistungen aktiv zu organisieren. Dies führt zu mehr Selbstbestimmung bei der Entscheidungsfindung, Kontrolle über das eigene Leben und aktiver Beteiligung an der Entwicklung von Dienstleistungen.

Zu den wichtigsten Ergebnissen des Projekts gehören ein Bericht über Beispiele guter Praxis für nutzerzentrierte Finanzierungsmodelle, Leitlinien für die Umsetzung des persönlichen Budgets, ein Werkzeugkoffer, bestehend aus Instrumenten, die die verschiedenen Interessengruppen, die an der Umsetzung des persönlichen Budgets beteiligt sind (Menschen, die Pflege- und Unterstützungsleistungen in Anspruch nehmen, Dienstleistungsanbieter und Behörden), unterstützen sollen, als auch Leitlinien zur Übertragbarkeit. Das vorliegende Dokument, die UNIC-Studie zur Übertragbarkeit, zeigt neben förderlichen Faktoren auch Herausforderungen für die Ausweitung der Entwicklung Persönlicher Budgets durch die EU-Instrumente auf. Die Zielgruppe sind in erster Linie Akteure (Behörden, Dienstleistungsanbieter usw.), die an einer Ausweitung des Persönlichen Budgets-Systems auf ihre eigene Gemeinde, Region oder ihr Land interessiert sind.

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Es werden die wichtigsten Perspektiven und Erkenntnisse des UNIC-Projekts in Bezug auf die Übertragbarkeit des Persönlichen Budgets-Systems dargestellt, die im Rahmen der ersten Pilotphase in Flandern, Belgien, und der anschließenden Übertragbarkeit in mehreren Ländern (Österreich, Tschechien, Finnland und Spanien) gewonnen wurden. Diese Erkenntnisse werden anschließend mit bestehenden EU-Initiativen und Finanzierungsprogrammen, die die weitere Verbreitung und Annahme von nutzerzentrierten Finanzierungssystemen unterstützen können, in Verbindung gebracht. Abschließend enthält das Dokument auch politische Empfehlungen für die wichtigsten Interessengruppen.

Managementsamenvatting

Het UNIC-project is gericht op ondersteuning van overheden bij het ontwikkelen van gebruikersgerichte financieringsmodellen voor langdurige zorg en ondersteuning. Het project wil ook dienstverleners ondersteunen bij de ontwikkeling en uitvoering van diensten gebaseerd op dit model. Gebruiksgerichte financieringsmodellen, zoals persoonsvolgende budgetten, zijn een innovatieve manier van financiering die steeds meer aandacht krijgen van overheden en verschillende belanghebbenden in Europa. In dit model verdeelt de overheid een geldbedrag rechtstreeks onder de personen met zorg- en ondersteuningsbehoeften, zodat ze actief hun eigen zorg- en ondersteuningsdiensten kunnen organiseren. Dit leidt tot meer autonomie bij het nemen van beslissingen, controle over hun eigen leven en actieve deelname aan de ontwikkeling van diensten.

Tot de belangrijkste resultaten van het project behoren een rapport over modellen van goede praktijken in gebruikersgerichte financieringsmodellen, een stappenplan met richtlijnen voor de implementatie van persoonsvolgende budgetten, een toolbox ter ondersteuning van verschillende groepen belanghebbenden die betrokken zijn bij de implementatie van persoonsvolgende budgetten (mensen die een beroep doen op zorg en ondersteuning, dienstverleners en overheden) en richtlijnen voor overdraagbaarheid. Dit document, de UNIC studie rond de overdraagbaarheid van kennis (in Engels: transferability study), identificeert stimulansen en belemmeringen voor het opschalen van de ontwikkeling van persoonsvolgende budgetten via EU-instrumenten. De doelgroep van het document bestaat voornamelijk uit belanghebbenden (overheden, dienstverleners, enz.) die geïnteresseerd zijn in het opschalen van het systeem van persoonsvolgende budgetten naar hun eigen gemeente, regio of land.

Het presenteert de belangrijkste perspectieven en bevindingen van het UNIC-project met betrekking tot de overdraagbaarheid van het systeem van persoonsvolgende budgetten, verzameld tijdens het initiële proefproject in Vlaanderen, België, en de daaropvolgende inspanningen voor overdraagbaarheid in meerdere landen (Oostenrijk, Tsjechië, Finland en Spanje). Deze bevindingen worden vervolgens in verband gebracht met bestaande EU-initiatieven en financieringsprogramma's die de verdere opschaling en invoering van gebruikersgerichte financieringssystemen kunnen ondersteunen. Tot slot presenteert het document beleidsaanbevelingen voor de belangrijkste belanghebbenden.

Resumen

El proyecto UNIC se centra en prestar apoyo a las autoridades que desarrollan modelos de financiación centrados en el usuario en el ámbito de la asistencia y los cuidados de larga duración.

El proyecto también pretende apoyar a los proveedores en el desarrollo y la prestación de servicios basados en este modelo. Los modelos de financiación centrados en el usuario, como los presupuestos personales, son una forma innovadora de financiación y han despertado el interés de las autoridades y de diversas partes interesadas en toda Europa en toda Europa. En este modelo, las autoridades distribuyen una cantidad de dinero directamente a las personas con necesidades de atención y apoyo, ayudándoles a organizar activamente sus propios servicios de atención y apoyo. De este modo, adquieren mayor autonomía en la toma de decisiones, control sobre sus propias vidas y participación en el desarrollo de los servicios.

Entre los principales resultados del proyecto se encuentran un informe sobre modelos de buenas prácticas en modelos de financiación centrados en el usuario, una hoja de ruta con directrices sobre cómo implantar presupuestos personales, una caja de herramientas para apoyar a los distintos grupos de interesados que participan en la elaboración de presupuestos personales (personas que recurren a la atención y el apoyo, proveedores de servicios y autoridades públicas), y directrices sobre transferibilidad. El presente documento, el estudio de transferibilidad del CINU, identifica los factores que impulsan y obstaculizan la ampliación del desarrollo de los presupuestos personales a través de los instrumentos de la UE. El documento va dirigido son principalmente las partes interesadas (autoridades, proveedores de servicios, etc.) en ampliar el sistema de presupuestos personales a su propio municipio, región o país.

Presenta las principales perspectivas y conclusiones del proyecto UNIC con respecto a la transferibilidad del sistema de presupuestos personales, recopiladas a través del proyecto piloto inicial en Flandes, Bélgica, y los posteriores esfuerzos de transferibilidad en varios países (Austria, Chequia, Finlandia y España). A continuación, se relacionan estos resultados con las iniciativas y los programas de financiación y programas de financiación de la UE que pueden apoyar la ampliación y adopción de sistemas de financiación centrados en el usuario. Por último, el documento presenta recomendaciones políticas para las principales partes interesadas.

Tiivistelmä

UNIC-hankkeessa viranomaisia kehittämään pitkäaikaisten sosiaalipalveluiden yksilölähtöisiä rahoitusmalleja.

Hankkeessa pyritään myös tukemaan palveluntarjoajia tähän malliin perustuvien palvelujen kehittämisessä ja tarjoamisessa. Yksilölähtöiset rahoitusmallit, kuten henkilökohtainen budjetti, ovat innovatiivinen rahoitustapa, ja joista viranomaiset ja eri sidosryhmät ovat kiinnostuneet ympäri Eurooppaa. Henkilökohtainen budjetointi on malli, jossa viranomainen myöntää budjetin ja auttaa henkilöä, jolla on avun ja tuen tarpeita, järjestämään itse tarvitsemiaan palveluita ja tukimuotoja. Tämä lisää itsenäisyyttä päätöksenteossa, oman elämän hallintaa ja aktiivista osallistumista palvelujen kehittämiseen.

Hankkeen tärkeimpiä tuotoksia ovat raportti yksilölähtöisten rahoitusmallien hyvistä käytännöistä, etenemissuunnitelma, jossa annetaan ohjeita henkilökohtaisen budjetin käyttöönotosta, työkalupakki, jolla tuetaan henkilökohtaisen budjetin käyttöönoton eri sidosryhmiä (palveluita käyttäviä henkilöitä, palveluntarjoajia ja viranomaisia), sekä ohjeet mallin juurruttamiseksi ja levittämiseksi. Tässä tutkimuksessa yksilöidään tekijöitä ja esteitä, jotka vaikuttavat henkilökohtaisen budjetin kehittämisen laajentamiseen EU:n välineiden avulla. Tämän asiakirjan kohderyhmä ovat ensisijaisesti sidosryhmät (viranomaiset, palveluntarjoajat jne.), jotka ovat kiinnostuneita henkilökohtaisen budjetin järjestelmän laajentamisesta omaan kuntaansa, alueeseensa tai maahansa.

Asiakirjassa esitellään UNIC-hankkeen keskeiset näkökulmat ja havainnot henkilökohtaisen budjetin järjestelmän siirrettävyydestä, jotka on koottu Flanderissa, Belgiassa, toteutetun alustavan kokeilun ja useissa maissa (Itävallassa, Tšekissä, Suomessa ja Espanjassa) toteutettujen työpajojen ja muiden juurrutustoimenpiteiden yhteydessä. Nämä havainnot

suhteutetaan sitten nykyisiin EU:n aloitteisiin ja rahoituksen ohjelmiin, joilla voidaan tukea yksilölähtöisten rahoitusjärjestelmien laajentamista ja käyttöönottoa. Lopuksi asiakirjassa esitetään poliittisia suosituksia keskeisille sidosryhmille.

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