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## DELIVERABLE 8.7:

### Updated Communication, Dissemination and Exploitation Strategy, and Action Plans

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Editors: **Edit Sebestyén, Joanna Lane, SHCN; Theologos Xenakis, NHT**  
Contributors: **All consortium partners**

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## Deliverable Summary

This document presents the updated Communication, Dissemination, and Exploitation Strategy and Action Plans for the final 12 months of the Invest4Health project. While the original plan was broad, project progress has clarified which action areas and platforms are most essential. These now serve as the main focus of communication and dissemination, ensuring efforts are targeted, effective, and aligned with the project's core outcomes.

## List of Authors

| Partner                 | Authors                   |
|-------------------------|---------------------------|
| SHCN                    | Edit Sebestyén            |
| SHCN                    | Joanna Lane               |
| NHT                     | Theologos Xenakis         |
| All consortium partners | WP8 working group members |
|                         |                           |
|                         |                           |

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## Glossary

| Acronym | Meaning                        |
|---------|--------------------------------|
| I4H     | Invest4Health                  |
| SCI     | Smart Capacitating Investment  |
| CPAG    | Citizen Patient Advisory Group |



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# 1. Introduction

This document presents the updated Communication, Dissemination, and Exploitation Strategy and the related Action Plans for the Invest4Health project. Its primary objective is to provide guidance for the final 12 months of the project to ensure we have the right focus. While the original strategy was necessarily broad and general, and still serves as a guiding framework, the progress and achievements of the project have helped clarify which areas are the most important and which platforms are most essential and impactful. These core elements now form the main focus of communication and dissemination activities.

However, key principles outlined in the original strategy remain relevant and continue to guide our work. These include accessibility, personalization, citizen-generated content, multi-channel and impact-oriented communication, digital and visual communication, open access, ethical considerations, feedback and evaluation. Communication and engagement activities continue at multiple levels, including raising awareness and strengthen understanding, stakeholder engagement, collaborative communication and networking, knowledge sharing and dissemination, influencing policy, and last but not least public engagement.

Previously identified and applied communication methods such as scientific publications and presentations at conferences, workshops, and roundtables; posters; organising public-facing events; interviews and articles in popular media; newsletters; and digital tools remain in use. Ethical considerations are consistently observed, social media policies are in place and followed, and elements of the visual identity are successfully applied across all channels.

## 2. Background

### Invest4Health Project goals and objectives

While the overarching goals and objectives of Invest4Health have remained consistent since the project's start, our understanding of how to achieve them has evolved over time. As the project progressed, from conceptual design to practical implementation, we gained deeper insights into what is most essential, feasible, and impactful. Our mid-term workshop in M24, and the development and the launch of the I4H Competence building training programme for the new testbeds at M29 also helped to gain better clarity. This has helped us refine our focus and messages, ensuring that our activities are even better aligned with the real-world needs of stakeholders and the systemic changes we aim to support. With this knowledge, this is how we briefly describe Invest4Health:

*Invest4Health (I4H) is a Horizon Europe-funded project working to redefine how we finance health promotion and disease prevention. In the face of shrinking public budgets and rising demand for health services, the project brings together 22 partners - including 8 regional testbeds (four as part of the consortium, and four selected through an open call) - to co-develop and test Smart Capacitating Investments (SCI). These innovative financial and business models aim to support health promotion and disease prevention as long-term investments, rather than short-term costs.*

*Prevention and investment have rarely been linked. Yet, investing in health before illness occurs brings long-term benefits for individuals, communities, and economies. I4H is advancing this shift by creating practical tools for needs and stakeholder assessment, investment modelling, and governance frameworks. Through real-life application and testing in regional settings, we explore how innovative financing mechanisms can unlock new and sustainable resources for public health.*

*Our approach combines expertise from health economics, health policy, public health, and finance. We work closely with municipalities, regional governments, citizens, and other stakeholders to co-develop and implement SCI models in real-world contexts in several countries all over Europe.*

*A key component of our work is also citizen and patient engagement, ensuring that local voices help guide investment decisions.*

*In addition, a competence-building training programme supports new regions in understanding SCI and how it can mobilize new resources to fund health initiatives.*

*I4H also aims to scale successful local/ regional solutions through social franchising, enabling other regions to adopt tested models while preserving quality, relevance, and community ownership.*

*Ultimately, Invest4Health is building the financial, institutional, and civic insights and capacity needed to make prevention central to public systems, delivering long-term value, improving population health, and reducing avoidable inequalities.*

## Target audiences for Invest4Health

The Consortium identified the target audiences for the project and our communication efforts, in the testbeds and at higher levels. Our audiences are varied, with different levels of knowledge about health promotion, disease prevention or finance and business models, interest in these matters or power to act:

- Healthcare decision-makers & policymakers
- Health insurers and other funders
- Public authorities/Municipalities
- Civil society
- Industry
- Research community
- Citizens & patients - citizen panels in regional test beds
- Advocates for public health
- Public health workforce and health and social care professionals
- Community services and social housing

However, they play crucial roles in shaping health related decisions and policies, implementing healthcare initiatives, providing services, conducting research, and advocating for public well-being.

To make our project's communication and dissemination efforts successful, it's important to understand these target audiences' knowledge, interests, and potential influence on decisions. For this, various stakeholder meetings were organised and interviews were conducted not just to map stakeholder groups but identify their interests, values, motivations that can also help to align our communication messages directed towards them.

## Key messages

Invest4Health's key messages are continuously shaped by what we learn through research, local implementation in the testbeds, and interactions with stakeholders. Several key moments helped define these messages. The mid-term workshop in M24 of the project was a major milestone in reflecting on project progress and early findings. Finalising the SCI Competence building training programme also helped gather all tools and learning into a structured format for training and self-study. Around the same time, more active collaboration began with the Citizen Patient Advisory Group (CPAG), which also supported the development of targeted messages.

Examples of main takeaways from our discussions and fieldwork include:

- Prioritizing health promotion is crucial for reducing long-term healthcare costs. Investments in prevention, such as fall prevention and early childhood education, can lead to significant health and economic benefits.
- Traditional investment models struggle to support health promotion due to long timelines and difficult-to-measure outcomes.
- Alternative approaches offer promising solutions, such as social impact bonds and co-investment with non-commercial entities (e.g., foundations or pension funds).
- Health professionals need stronger economic arguments to advocate for more resources in health promotion. Clear value propositions and simplified communication strategies can help gain their support.
- Framing health promotion projects in ways that appeal to investors, by focusing on scalability, measurable outcomes, and alignment with investor expectations, can attract funding, drawing inspiration from successful models for example in the green investment sector.
- Citizen involvement is key to building trust in new financial models and generating political support.
- Making financing tools easy to understand can help the public see the benefits of investing in health and well-being.

As Invest4Health continues, key messages, along with additional insights that emerge, will remain central to our communication, training, and advocacy work, ensuring that our approach to health investment is inclusive, evidence-based, and forward-looking, and will be included in written outputs as well.

## Project progress by M30

Since its launch, Invest4Health has undertaken a wide range of activities to develop, test, and promote innovative financing approaches for health promotion and disease prevention. The following are key activities and outputs achieved so far:

- Developing the concept of Smart Capacitating Investment (SCI) to support sustainable financing for health promotion and disease prevention.
- Creating practical tools and visual models to apply SCI in real-world settings, including stakeholder engagement strategies and conceptual frameworks.
- Designing evaluation frameworks to assess the long-term impact of SCI enabled interventions.
- Applying foresight methods to identify emerging SCI priorities.
- Designing SCI-compatible financing models tailored to local and regional needs.
- Developing context-specific business models to support SCI financing approaches.
- Engaging four initial regional testbeds to pilot SCI models through deep-dive workshops, situational analyses, logic model development, stakeholder mapping, meetings, workshops, and interviews.
- Establishing a Citizen Patient Advisory Group to ensure that community voices help shape investment priorities and SCI through participatory governance.
- Organising an online mid-term workshop to share progress and gather feedback.
- Launching an Open Call and selecting four additional regional testbeds to test and refine SCI models.
- Developing and launching an I4H Competence building training programme to help local actors implement SCI in practice.
- Carrying out communication, dissemination, and joint engagement activities across the consortium.
- Producing scientific publications to share research findings.

## 3. Communication and dissemination

The Invest4Health project has implemented its communication and dissemination activities as planned, targeting various stakeholder groups like public health professionals, citizens and community groups, local, regional, and national authorities, researchers, EU institutions, health decision-makers and policymakers, businesses and industry stakeholders, EU-level networks, and international initiatives.

Work is to be continued in the final phase of the project with an additional focus on financial stakeholders. Their involvement is key to ensuring that the Smart Capacitating Investment (SCI) approach can be sustained and scaled up effectively.

## General objectives

The dissemination objectives of the project ensure effective communication, stakeholder engagement, and knowledge exchange throughout its lifecycle. Until M30 these objectives guided us to:

- Promote project goals and activities.
- Announce project launch and provide ongoing progress updates.
- Stakeholder engagement and involvement in testbeds .
- Event participation to present at conferences and contribute to relevant publications.
- Strategic collaboration to support health innovation strategies and engage with WHO global networks.
- Education & training – deliver training on impact financing and health-related technologies.
- Conducting midterm review and promote the open call.

To strengthen our dissemination objectives and reflect on the evolving focus of I4H, we included the following:

- Promote the Smart Capacitating Investment (SCI) framework as a key innovation of I4H, including its principles, funding and investment taxonomy and tested models.
- Share key findings and experiences through accessible formats like case studies, policy briefs, lay summaries.
- Highlight citizen and stakeholder voices, including the role of the CPAG, to promote meaningful public involvement and advocacy for inclusive health investment strategies.
- Support policy influence by formulating and communicating policy recommendations aimed at enabling systems change and better investment conditions for health promotion.
- Ensure sustainability and visibility of results, including finalising the SCI repository, preparing final outputs, and planning for post-project dissemination (e.g., follow-up partnerships or platforms).
- Host a final conference to share outcomes with a wide audience, including the finance and health sectors.

## Approach

Invest4Health uses a step-by-step communication and dissemination approach that moves from awareness and understanding to action. At each stage, we adapt our messages and methods to match the needs of different audiences. Communication at the testbed level has followed the same tiered approach.

The *awareness stage* focuses on visibility. We use tools like the project website, social media, newsletters, and printed materials to reach a broad audience, like citizens, professionals, public authorities, and finance sector actors.

At the *understanding stage*, communication becomes more interactive. We engage more directly with stakeholders, especially in the testbeds, to explain concepts, answer questions, and support dialogue through workshops, meetings, and interviews (at project level we had the mid-term workshop).

In the *action stage*, we encourage active involvement from testbed actors, citizen-patient representatives, and others to co-developing and testing SCI models. We use participatory methods to support local engagement and ownership. We also collaborate with external partners on publications to broaden the project's impact.

## Communication and dissemination achievements and next steps

Invest4Health has made substantial progress in communication and dissemination, engaging a broad audience across multiple channels. Through a diverse partnership and a strong presence at scientific events, online platforms, and regional activities, the project has raised awareness, supported collaboration, and ensured community voices are heard.

Dissemination activities have operated on both the project and local levels where "local" refers to efforts led by partners and testbeds. This approach has helped tailor key messages to different audiences and contexts, which will remain a core strategy for the final year of the project.

Throughout the first 30 months, Invest4Health has built visibility and engagement through dedicated tools, stakeholder involvement, public events, and scientific outputs. These achievements are documented in detail in *Annex 1: Key Performance Indicators*, which provide a summary of progress to date.

Looking ahead, in the final year of the project, we will prioritise the key areas and platforms detailed in the following sections. Our focus will be on continuing to refine Smart Capacitating Investment (SCI) models in collaboration with the newly joined testbeds and supporting the scale-up of successful solutions. These efforts aim to maximise the project's impact on financing health promotion and disease prevention across Europe.

## Key areas for communication, dissemination, and joint activities between M31-M42

### *SCI Conceptual framework*

At the heart of Invest4Health is the Smart Capacitating Investment (SCI) framework, our main innovation designed to rethink how we fund health promotion and disease prevention. SCI involves new types of financial and non-financial investments that aim to build long-term capacity for healthier lives and reduce health inequalities.

Because this approach is new, it is essential that we clearly explain our research findings and what SCI means in practice. Our work looks at how SCI can be used to support strategies and specific interventions to tackle complex health challenges, support cross-sector collaboration, and bring in new resources for public health.

This is why communication is not just about visibility, it is about helping stakeholders understand and apply these ideas. SCI will also be a key focus of our dissemination work, featured in training materials, policy outputs, and resources shared through the SCI repository to support ongoing learning and uptake.

To make this happen, we focus our efforts both at the testbed level, where SCI is tested in real-life settings, and at the project level, where we build shared understanding, produce resources, and connect the bigger picture. Together, these efforts ensure that our research is accessible and has a lasting impact.

### *SCI testing and learning in the testbeds*

Testbed activities are closely monitored and documented through deep-dive workshops, sharing and learning sessions, and ongoing consortium discussions. Key insights are shared via newsletters, website articles, and local presentations, making SCI testing and learning a core focus of our communication efforts.

New testbeds will be presented at the project website and our newsletter. The testing processes, local contexts, prevention initiatives, stakeholder engagement, key findings, and identified SCI opportunities can also be summarised in case studies both for the initial and new testbeds, developed in collaboration between WP8 and WP5. These case studies can be included in the SCI Repository (see below) to support ongoing learning and future application. SCI-related learnings and recommendations will be compiled in a White Book, a joint publication (see below) and shared at the final conference.

### *Competence building training programme to use SCI locally*

The I4H Competence building programme is a key outcome of the project. It supports local actors in understanding and applying SCI approaches to health promotion and disease prevention innovative financing. The programme was developed in collaboration with the initial testbeds and, as of May 2025, is being implemented and tested with the newly joined testbeds to ensure it meets practical needs across different contexts. As part of WP5, the programme will also be a central topic for dissemination activities, highlighting it as one of Invest4Health's most important results.

In the long term, parts of the training materials will be included in the SCI Repository for open access and self-study. The final training material will also be a key part of a proposed social franchising package that will support the exploitation and scaling of the project results and impact beyond the project.

### *Making the case for systems change and SCI adoption*

Informal advocacy has already taken place at partner levels (including not only the testbeds but partner levels), where several consortium members have shared the SCI concept and early findings with local authorities, regional policy makers, and other key stakeholders. These interactions, while less structured, have helped raise awareness and open conversations about the potential of the SCI paradigm in real-world settings and partner organisations.

Building on earlier stakeholder engagement and local advocacy efforts, Invest4Health will now move toward a more focused and structured phase to make the case for change with the lead of WP5 to support system change and promote the adoption of Smart Capacitating Investment (SCI).

Clear, evidence-based policy messages and arguments are being prepared to help convince decision-makers of the value and opportunities SCI offers for sustainable health promotion and disease prevention. These advocacy materials in the format of a policy brief, will be a key part of the project's dissemination strategy and will also be integrated into the SCI repository to ensure long-term accessibility and use.

### *Working with citizen patient representatives*

The Citizen Patient Advisory Group (CPAG) currently includes ten members with diverse backgrounds, formally contracted through Region Skåne. They have held four meetings so far, with regular quarterly meetings planned for the rest of the project. CPAG members have actively taken part in several project activities, such as foresight exercises, the mid-term workshop, the Brussels consortium meeting, or the Open Call assessment. Where possible, they also visit local testbeds to help ensure the citizen voice is heard where SCI models are being tested.

Contribution to the project activities will be continued, for example taking part in the competence building programme to make sure citizen voice is represented, will produce lay summaries for the SCI repository from key outputs, will participate in the development of the co-governance platform, or participate in conference workshop as panellist. Their insights will help shape our key messages on public involvement and inclusive governance, both within I4H and beyond.

In addition to supporting implementation and contributing to key project outputs, CPAG plays a wider role. One of Invest4Health's main goals is to highlight the importance of including citizens and patient representatives in decisions about health investments, both within the project and beyond. This message will also be a focus of our dissemination efforts.

CPAG also serves as a platform to share I4H achievements with the broader networks of its members, helping to spread project messages more widely.

Moreover, as a structured model of citizen involvement, CPAG is more than just a task, it may also become a lasting outcome of the project. We are exploring ways for the group to continue beyond the project, potentially within an existing European platform. Supporting the visibility and sustainability of CPAG will be part of WP8's final phase.

### *Joint activities - Partnerships and external collaborations*

In addition to identifying partners and collaborators locally for the regional test-beds as part of WP6, such as research institutions, healthcare organisations, advocacy groups, relevant professional associations, government agencies, academic institutions, community-based organisations, non-profit organisations, and actors from the investment fields, to enhance the reach and impact of our communication efforts, WP8 also facilitates the development of joint activities at the consortium level with the following initiatives.

Collaboration with the Transforming Health and Care Systems (THCS) Partnership

Close relationship has already been built with THCS through its Advisory Board. Activities that are planned:

- *Organise a joint webinar by Invest4Health and the THCS Partnership (October 2025)*
  - Target audience: THCS Strategic Advisory Board (SAB) members and regional stakeholders
  - Share key learnings and early findings from Invest4Health – The approach to smart capacitating investment and its potential for systemic transformation
  - Present use cases, governance innovations, and policy enablers of sustainable health investment - To engage SAB members in a structured reflection on applicability across European health systems.
- *Establish a joint working group to co-create a policy oriented White Paper (October 2025 - March 2026)*
  - Focus: lessons from Invest4Health, and roadmap for replication and scale-up
  - Key success factors and barriers in SCI and its models;
  - Frameworks for regional and national scale-up;
  - Recommendations for alignment with THCS implementation and investment strategies
  - Meet monthly (online)
  - Co-develop the content and structure of the White Paper;
  - Gather and analyse relevant cases, governance models, and financing tools;
  - Final publication for joint dissemination via EU platforms, networks, and events.

By forming a joint working group to optimise collaboration, with the lead of WP8 and participation of testbed representatives, THSC and other potential external stakeholders, a White Book on SCI learning and recommendations will be jointly produced by Q2 of 2026.

Horizon Europe projects funded under the same call

Additionally, three projects, financed under the same call as I4H, HORIZON-HLTH-2022-IND-13-03, were also identified for potential collaboration too: (i) *FLASH* project which investigates healthcare financing mechanisms across Europe, focusing on budget allocation and

financing of health services for effective efficient and equitable health system with flexible financing, (ii) the HI-PRIX project which aims at accelerating access to high-quality, affordable health innovation by fostering the adoption of new pricing and payment models, and (iii) the ASCERTAIN project which addresses the needs of patients, physicians, payers, regulators, and manufacturers to improve the affordability and accessibility to innovative health technologies. These will also be invited to join the working group in a later phase to gather shared knowledge for the White Book.

Other potential collaborations

Through collaboration with the Citizen Patient Advisory Group, a list of further external organizations was recommended for early engagement and exploration of next steps.

For early presence/exploration and next steps:

- Global Health Sustainable Finance Coalition
- Danish Life Science Cluster
- SHAFE Foundation
- EHFF
- OECD Wise Centre

Final project event (but exploring collaboration soon) and next steps

- IMF Seminar on Global Economy
- TBLI - well Dutch-based
- JA PreventNCD

### *SCI repository*

The Smart Capacitating Investment (SCI) Repository will serve as a central resource hub for present and future use, hosting a wide range of materials on innovative practices generated throughout the project's SCI testbeds.

The repository will support knowledge exchange, capacity building, and exploitation of I4H results by making part of the content available as “open access” to any interested stakeholder after the project ends. It will also serve as background resource base for the competence building programme.

The Repository is being built gradually, with some documents already available in the dedicated “Resources” section of the Invest4Health website. Additional materials will continue to be added, including:

- deliverables and reports
- scientific publications
- lay summaries of outputs
- visual materials
- policy brief
- presentations

- other relevant outputs.

The SCI Repository will be a key output of the project and a central element of dissemination activities in the final phase. It will be actively promoted across various platforms and channels. Designed for both present and future use, it will offer open access to a wide range of materials generated across the SCI testbed sites.

In the coming months, we will continue to build and expand the Repository, promote it through targeted communication efforts, and integrate it more closely with training and stakeholder engagement activities. After the project ends, it will remain accessible for ongoing use by practitioners, policymakers, and other interested users.

*The work will be closely coordinated with WP7, the team developing the ‘Social Franchise Model and Package,’ as the Repository will not only contain open-access materials but also provide a preview of the I4H franchising package.*

## Key platforms for communication and dissemination of I4H

The following key platforms represent the focus of our upcoming communication and dissemination activities. These channels ensure the widest possible reach and lasting impact. They are to share project findings, promote the Smart Capacitating Investment (SCI) approach, and support knowledge exchange at both local and European levels.

### *Testbeds and their regional and national networks*

The testbeds themselves are a key platform serving not only as real-life sites for implementing and testing the SCI approach, but also as local hubs for stakeholder engagement, learning, and communication. They connect the project directly to communities and decision-makers, making them essential for both evidence generation and local-level dissemination.

For the remainder of the project, both the initial and newly joined testbeds will continue to play a vital role. The new testbeds bring fresh external perspectives and are participating in a training programme to apply the SCI approach in their local contexts. Together, all testbeds contribute to learning, refining tools, and sharing insights, helping to scale successful solutions, and strengthen the impact of Invest4Health across regions.

### *Consortium partners and their networks*

Besides the testbeds, the project heavily relies on the diverse networks of its consortium members. University departments, an international public health organisation, research institutes and R&D organisations, an innovation cluster and an innovation organisation, as well as an EU region all offer valuable connections to individuals, institutions, and wider networks. These are actively used to communicate and disseminate Invest4Health’s core aims, objectives, key activities, expected impacts, and achievements to date."

### *International and national events*

We will continue sharing the Invest4Health (I4H) research results, practical experiences from SCI testing in our testbeds, collaboration with stakeholders, including citizen-patient representatives, the competence building training programme, and related policy insights nationally and internationally at relevant professional events.

One of the key opportunities will be the European Public Health Conference 2025, taking place in Helsinki, Finland from November 12–14. The accepted abstract can be found in Annex 1. The theme of the conference is “Investing for sustainable health and well-being”, which aligns closely with I4H’s objectives. The annual EPH Conference attracts around 2,500 international delegates, making it an excellent platform to raise I4H’s profile in the public health community and connect with influential opinion leaders, policy-makers, and researchers.

### *Project website*

A public website for Invest4Health was launched at the end of M6 and serves as a key platform for communication, visibility, and stakeholder engagement. It offers up-to-date information on project objectives, progress, and results, and functions as a central hub for sharing publications, deliverables, and news. The site already hosts information on the consortium, aims, objectives, current activities, test beds, the midterm workshop, and the open call. A resources page is being developed for deliverables, scientific publications and any other project material.

Website address: [www.invest4health.eu](http://www.invest4health.eu)

Upcoming developments include:

- sharing information about the 2<sup>nd</sup> tranche of test beds,
- a dedicated page for the Citizen Patient Advisory Group
  - to share information about the CPAG and key messages on citizen and patient representation, ensuring that diverse and inclusive voices are reflected in public health innovation, particularly in co-creation, needs assessment, decision-making, and research, and demonstrating how citizen input contributes to more relevant, accepted, and impactful health solutions,
- building the SCI repository gradually as part of the Resources page,
- a dedicated page for the social franchising offer, and
- a dedicated page for the final conference.

### *Social media*

A project-dedicated social media presence has been established on Twitter/X and LinkedIn. The Twitter/X account currently has 600+ followers. These channels are used to share news about project events, conference appearances, publications, and key updates. Sharing posts through partners' accounts also helps spread the I4H message further and increases visibility. Social media is an important tool for raising awareness, reaching new user groups, but we know it has its limitations too, and too much content can also overwhelm audiences.

We will continue using these platforms efficiently to keep our content visible, relevant, and engaging. Efforts will be ongoing to grow the audience and enhance the use of social media for dissemination, and increased project visibility.

### *Newsletters*

The Invest4Health newsletter is an important tool for sharing updates about the project's progress, key actors, and consortium activities. Delivered electronically, it allows us to reach thousands of contacts across Europe efficiently. However, we also recognise, it is a relatively passive form of communication and dissemination. While it helps raise awareness, deeper engagement requires more interactive and targeted approaches, like testbed face-to-face events with regional stakeholders, or at project level, participating in conferences, networking, or building relationship with external bodies, projects, organisations, or the CPAG itself.

We publish the Invest4Health newsletter every six months, with a minimum of three issues planned during the remainder of the project.

### *Final conference*

The Invest4Hhealth final conference will serve as a key event to share the project's main results and engage stakeholders from all sectors with particular emphasis on the finance and investment sectors.

The conference is planned to bring together around 80 participants in person and offer a programme that includes research findings, practical insights from testbeds, policy messages, and the social franchising approach. Innovative formats and maybe a livestream are also planned to ensure wider access.

This event will not only support dissemination but also encourage dialogue with key stakeholders about future steps and the role of SCI in transforming health systems.

The Invest4Health final conference will take place on 28 May 2026 followed by the final in person consortium meeting.

### Objectives

- Present the concept and policy relevance of smart capacitating investment as a new paradigm for sustainable and equitable health systems .
- Showcase business and finance model options and new governance mechanisms developed and tested by Invest4Health.
- Share key outcomes and lessons from the project's 8 regional testbeds and associated best practice examples
- Mobilise continued policy support, cross-sector investment, and uptake of I4H approaches.
- Launch a White Paper, co-published with the THCS Partnership, to disseminate strategic insights and influence future European and national investments in health and care transformation

Why all these matter in very simple terms

- Prevention and investment are rarely combined, but should be.
- Health promotion and disease prevention often lack sufficient funding.
- Public budgets are tight; resources are limited.
- Innovative financing models are needed, blending public and private (e.g. health insurers).
- Investing in prevention offers long-term, sustainable returns for people and the economy.
- Prevention should be treated as smart, capacitating investment, not a cost.
- I4H offers a new investment paradigm.

Strategic stakeholders/Audience for the conference

- European Commission (DG SANTE, ECFIN, REGIO, RTD)
- National and regional governments
- Council of Europe Development Bank (CEB) and European Investment Bank (EIB)
- Health Insurers inc. Insurance Europe and The European Life and Health Underwriters' Association (ELHUA)
- OECD, WHO Europe, and Committee of the Regions
- THCS Partnership (Transforming Health and Care Systems)
- Social impact investors, private foundations, and philanthropic actors
- Invest4Health testbed regions, community partners, health and social care providers
- Think tanks, academic institutions, and health equity coalitions
- European, national, regional public health institutes, organisations, associations (EUPHA)
- Citizen Patient representatives (European Patient Forum, Citizen assemblies, panels, or councils)
- Other policy related organisations

Core content/Themes

- Smart Capacitating Investment
- Business & Finance model options
- Eight regional testbeds
- Other emerging best practices
- THCS and I4H White Paper
- Citizen Patient voice
- I4H Social franchising package

Methods

- Plenary on strategic options to finance HP and DP
- Panel discussions on Business Models for prevention and equity; Smart investment in action: Voices from the 8 Testbeds; Blended finance and institutional alignment; Lessons for Policy and Practice

- Roundtable - From pilots to policy
- Innovation showcase - Testbed presentations, tools, impact stories

#### Partnership

- Council of Europe Development Bank (CEB) (keynote speaker)
- European Investment Bank / EIF
- THCS partnership
- OECD

#### Venue / Format

- Brussels – to be confirmed
- Format: Hybrid (appr. 80 in-person+ virtual depending on the available facility)

## WP8 Needs and interdependencies

Given the complexity of Invest4Health, the project places strong emphasis on interdependencies across work packages, supported by various small working groups.

This collaborative approach is equally present in WP8, where coordination extends beyond regular WP8 and consortium meetings, and the executive Board meetings occur every three weeks. These are complemented by targeted side meetings for example with researchers, or members for joint testbed actions, and the Citizen Patient Advisory Group (CPAG) to support lay communication.

This structured collaboration and monitoring will continue and even intensify as the project approaches its final phase, leading to the organisation of the final conference in Brussels, which will highlight and communicate I4H's key messages and results, alongside building the SCI repository with the partners using I4H key output and supporting exploitation activities.

## Monitoring of communication and dissemination activities

To ensure effective communication and dissemination in I4H, we have implemented an online monitoring system that allows us to systematically track project- and partner-level activities, including publications, event plans, and participation.

We continue to collect data on key performance indicators (KPIs) and produce summary reports every six months. This ongoing monitoring supports the continuous evaluation and refinement of our strategies. (See M30 indicators in Annex 2)

## 4. Exploitation

### Overview

The core of the Invest4Health (I4H) exploitation strategy is leveraging social franchising as a vehicle for scaling and replicating the SCI models, tools, and governance mechanisms across regions to generate long-term impact in health promotion and disease prevention.

During the first half of the project, we worked to identify and further define key elements of a franchise package, which will form the offering of the Invest4Health social franchise brand to potential franchisees interested in building successful initiatives using innovative financing and investment models.

### Expansion through new regional testbeds

A crucial milestone in the exploitation strategy, aimed at further developing the I4H offering, validating preliminary results in new regions, and covering a broader range of health system types, has been the Open Call for a 2<sup>nd</sup> tranche of regional testbeds. The Open Call process took place in Q4 2024 and Q1 2025, and following its successful conclusion the following regional testbeds were welcomed to the I4H community:

- Istituto Superiore di Sanità – Lazio, Italy;
- National School of Public Health, NOVA University Lisbon – Lisbon, Portugal;
- Health Tech Lab – Belgrade, Serbia;
- Region of Jönköping County – Jönköping, Sweden.

Through the Open Call activities, the I4H consortium aims to support regional testbed teams in building their competence, and eventually capacity, in implementing novel financing approaches for health promotion and disease prevention. This can create value for citizens through potential long-term health benefits and for regions by unlocking new funding opportunities, supporting community-driven initiatives, and potentially reducing healthcare costs through a healthier population. Activities with the new testbeds kicked off in May 2025.

### Developing the social franchise model

In recent months, as Invest4Health results have been crystallizing through the iterative work of partners and testbeds, we have explored several potential social franchising models for I4H. These include the Master Franchise Model, Hybrid License and Franchise Models, and Cooperative Franchise Network Models, among others. These models will be discussed further with the consortium and testbed teams in the coming months. Input from the Citizen Patient Advisory Group will also be sought to identify the most suitable model for scaling I4H results and delivering social impact.

As part of franchise model development, we are currently preparing a plan outlining the franchisor–franchisee relationship, a stakeholder overview, and a business model to guide delivery of our value proposition and services. This will enable Invest4Health to offer a scalable

social franchising package to potential franchisees. Key elements considered in developing the I4H franchise business model include defining the target audience, crafting a marketing strategy to attract franchisees, and designing an operational plan to support smooth and effective SCI implementation across different regions.

## Value proposition and next steps

At this stage, our value proposition to potential franchisees includes the know-how developed by I4H, training materials, advisory and support services, and access to a community of practice. This value proposition will be further refined in the second half of the project through collaboration with both new and existing testbeds.

In the coming months, we will continue to build momentum for large-scale SCI adoption among stakeholders and policy makers through our communication channels and by participating in and hosting relevant events.

The final value proposition and franchise package for large-scale SCI adoption will be shared with interested stakeholders and the public in 2026.



# ANNEX 1 - Action plans for communication, dissemination, and exploitation for M31-M42

## Updated Action Plan for communication, dissemination and joint activities

| KEY ACTIONS                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | M31-32 | M33-34 | M35-36 | M37-38 | M39-40 | M41-42 | Main responsible   |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------|--------|--------|--------|--------|--------|--------------------|
| <p><b>WP8 working group</b></p> <p>Comprising consortium partner representatives responsible for communication and dissemination activities + side meetings, e.g. with the testbeds, CPAG working groups.</p> <p><b>Collaboration with partners:</b></p> <p>Foster collaboration and coordination with project partners to align communication efforts and maximise impact.</p> <p>Regularly communicate with partners to exchange updates, share resources, and coordinate joint activities.</p> <p>Explore opportunities for joint publications, presentations, or other collaborative initiatives.</p> | x      | x      | x      | x      | x      | x      | SHCN, All partners |



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|                                                                                                                                                                                                                                                                                                 |   |   |   |   |   |   |              |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|---|---|---|---|---|--------------|
| <b>Website update:</b><br><br>Regularly update the project website with news, announcements, and relevant project-related information.                                                                                                                                                          | x | x | x | x | x | x | SHCN         |
| <b>Content creation for communication channels:</b><br><br>Collaborate with relevant work packages to gather information and analyse data for content creation.<br><br>Develop compelling and informative content that effectively communicates the project's objectives, findings, and impact. | x | x | x | x | x | x | All partners |
| <b>Website development/maintenance:</b><br><br>Extended page for new tranche of testbeds<br><br>New webpages for citizen/patient representatives – final conference – social franchise package                                                                                                  | X | x | x | x | x | x | SHCN         |
| <b>Additional graphical design:</b><br><br>For SCI related research outputs/Final conference                                                                                                                                                                                                    | x | x | x | X | x | x | SHCN         |

|                                                                                                                                                                                                                                                                                                                      |   |   |   |   |   |   |                 |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|---|---|---|---|---|-----------------|
| <b>Project publications:</b><br><br>White Paper; Scientific publications                                                                                                                                                                                                                                             | x | x | x | x | x | x | All partners    |
| <b>Social media:</b><br><br>Continue social media presence                                                                                                                                                                                                                                                           | x | x | x | x | x | x | SHCN + Partners |
| <b>Newsletter (6 monthly):</b><br><br>Create 3 newsletters to provide regular updates and highlights about the project's activities and achievements.<br><br>Distribute the newsletter to stakeholders, partners, and interested individuals via email or other appropriate channels.                                | x |   | x |   |   | x | SHCN + partners |
| <b>Supporting stakeholder engagement in initial and news test beds:</b><br><br>Identify key stakeholders relevant to the project, such as researchers, policymakers, community organisations, financial actors and the citizens.<br><br>Provide communication resources for the testbed to support local activities. | x | x | x | x | x | x | WP6+WP8         |

|                                                                                                                                                                                                                                                                                                                                                                               |   |   |   |   |   |   |                           |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|---|---|---|---|---|---------------------------|
| <b>Running a Citizen Patient Advisory Group</b><br><br>WP3 activity with a strong communication/dissemination aspect. Running side meeting with subgroups, like “Lay summary group”, “Collaborative platform group”, “Training group”                                                                                                                                         | x | x | X | X | X | X | WP3+WP8                   |
| <b>Events and conferences:</b><br><br>Identify relevant events and conferences in the field and plan the project's participation, such as presentations, panel discussions, or workshops.<br><br>Develop materials and presentations to effectively communicate the project's objectives and outcomes.<br><br>Network with attendees and explore collaboration opportunities. |   |   | x | x | x | x | All partners              |
| <b>Joint activities:</b><br><br>Stakeholder engagement at project level – with relevant initiatives, umbrella organisations, EU projects funded under the same call.<br><br>Joint webinar with THCS<br><br>Working group on White Book.                                                                                                                                       |   | x | x | x | x | x | SHCN, RS + other partners |

|                                                                                      |   |   |   |   |   |   |                           |
|--------------------------------------------------------------------------------------|---|---|---|---|---|---|---------------------------|
| <b>Scientific publications</b><br>Publishing (ongoing)                               | X | X | X | X | X | X | Researchers               |
| <b>Social franchising</b><br>Dissemination.                                          |   |   |   | x | X | X | WP6, WP7, WP8,<br>CPAG    |
| <b>Final conference</b><br>Preparations and organisation by the conference committee | X | X | X | X | X | X | WP9 + WP leader delegates |

### Updated Action Plan for exploitation

| KEY ACTIONS                                                                                                                                      | M1-6 | M7-12 | M13-18 | M19-24 | M25-32 | M32-42 | Responsible    |
|--------------------------------------------------------------------------------------------------------------------------------------------------|------|-------|--------|--------|--------|--------|----------------|
| <b>Develop a SCI package</b> ready for large scale demonstration in participating and new regions.                                               |      | x     | x      | x      | x      | x      | All partners   |
| <b>Develop the exploitation plan</b> using a social franchising model for testing and scaling the SCI package through large-scale demonstrators. |      | x     | x      | x      | x      | x      | All partners   |
| <b>Develop a strategic guidance</b> for transfer and replication.                                                                                |      |       | x      | x      | x      | x      | SRI, SHCN, NHT |

|                                                                                                                                                                                                                                                                                                                   |  |  |  |   |   |   |                                                                     |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|--|--|---|---|---|---------------------------------------------------------------------|
| <b>Conduct simulation exercises and training</b> / capacity building programme on SCI with 2 <sup>nd</sup> tranche of regional testbeds.                                                                                                                                                                          |  |  |  | x | x | x | NHT, IESE, RS, EHNet, RISE, contribution by all consortium partners |
| <b>Engage with stakeholders and decision makers</b> to gauge opportunities and mobilize for further deploying the financing and business models developed in the project.                                                                                                                                         |  |  |  |   | x | x | NHT, RISE, contribution by all consortium partners                  |
| <b>Organize workshops on the development and implementation of the franchising model</b> by social enterprises, regions, and other relevant stakeholders, to enhance their understanding of the SCI package upside and empowering them to enhance value creation to their local communities through SCI adoption. |  |  |  |   | x | x | NHT, RISE                                                           |

# ANNEX 2 – Key Performance Indicators till M30

## Indicators and measurements

The following Key Performance Indicators (KPIs) provide an overview of Invest4Health's progress and impact up to Month 30, reflecting the achievements across communication:

- 1 website at project level with 11 pages (30+ news items, deliverables, research papers, 1 mid-term WS report)
- 1 press release at the project level, 2 press releases at the local level
- 1 brochure, 2 flyers, 1 display stand at the project level, + 4 print materials at the local level
- 4 types of project templates for deliverables and publications
- 5 electronic newsletters at the project level shared with European contacts (1200+)
- Research newsletters at the local level
- 1 project level foresight exercise with 60+ participants
- 4 testbed level foresight exercises
- 4 Citizen Patient Advisory Group meetings with min 8 members with side activities
- 1 project level mid-term WS with 60+ registrations and 40+ live participants
- 600+ followers, 35 tweets at the project level, 40+ LinkedIn posts, 16k+ impressions at the project level, + reshared posts by partners
- 25+ website articles at the partner level
- 9 international conference presences (2 symposium/workshops, 1 poster, 4 presentations, 2 booths + presentations, 1 input for WHO strategic innovation agenda)
- 1 accepted abstract for the European Public Health Conference in Nov 2025
- 1 Interview
- 30+ local/regional/national presentations/meetings/events/workshops/deep dives with stakeholders (1000+ attendees)
- 1 case study featuring I4H in the upcoming updated EhNet publication 'eGuide for Financing Health Promoting Services'
- 1 scientific publication published in high-impact factor peer-reviewed journal, 3 in progress
- 3 scientific articles are in progress
- 1 research protocol published at the Open Science Framework
- 1 scientific editorial published linking it also to I4H
- 2 educational/training events/joint seminar on finance issues and social franchising/research results
- 1 video on project launch
- 1 video on testbed health promotion action
- 1 Open Call, 17 applications, 4 selected new testbeds
- M3: D8.1 Project website
- M6: D8.2 Communication, Dissemination and Exploitation Strategy, and Action Plans
- M24: D8.3 Mid-term Public workshop
- M30: D8.7 Updated Communication, Dissemination and Exploitation Strategy, and Action Plans



### Most frequently reached audiences:

- Citizens
- Public health workforce
- Public health decision-makers & policymakers
- Research community
- Regional, national, and local authorities
- EU institutions
- Civil society organisations
- Industry and business partners
- Innovators

### References to project outputs:

- Testbed
- Citizen/patient involvement
- Networking/collaboration
- Knowledge sharing and exchange activities
- Research findings
- Dissemination and communication products
- Social franchise model
- Other

## ANNEX 3 – Accepted I4H workshop abstract for the 18<sup>th</sup> European Public Health (EPH) Conference

**18th European Public Health (EPH) Conference, 11 - 14 November 2025 in Helsinki, Finland**

Reference: W202500279 (01/05/2025)

### **Abstract**

Workshop

### **Topic 1**

Health promotion: investing in health and equity

### **Topic 2**

Economy of well-being and public health

### **Workshop type**

Practice session

### **Title**

Reimagining how to plan investment in health promotion and disease prevention

### **Organiser / Co-organisers**

Invest4Health

**Contact person: Prof Joanna Lane**

### **Workshop abstract**

Introduction: Prevention and investment are not terms that have often been combined. Indeed, securing sufficient investment for health promotion (and disease prevention) is a perpetual challenge. In a working environment with increasing scarcity of resources and static public budgets, innovative approaches are needed to maximise public sector assets and perhaps blend this with private investment options including from health insurers.

Reason for the workshop: In an economy of wellbeing, investing in prevention rather than repair offers a more sustainable return on investment for the economy and its communities. Paradoxically, the 2007-2009 economic/financial crises and the COVID pandemic also reminded us of two lessons learned by government and municipalities since the 19th century; the centrality of health in our societies and economies and the importance of prevention as a strategic principle for planning and investment.

Prevention is investment and needs to be designed and financed within an investment paradigm. Accordingly, the workshop will share learning and insights from the EU Horizon project 'Invest4Health'. The project has 18 partners and 8 regional testbeds across Europe, who have been developing and testing finance and investment models, an alternative governance mechanism and practical tools, that will start to show how this shift can be accomplished using 'smart capacitating investment'.

Objectives: This workshop has the following objectives – (i) introduce the concept of smart capacitating investment (ii) explain how we flipped from research to implementing and testing SCI financial and investment models in the 8 regional testbeds (iii) explore the challenges and solutions to working with a wide range of stakeholders in order to deliver real-world impact (iv) discuss next steps in how to fast-track replication and uptake of SCI in new regions including a novel social franchising model

Workshop discussion: In this workshop we want to inspire participants to connect with the panellists and each other about how to plan and finance health promotion and disease prevention using an investment approach. This means ensuring spontaneity and real dialogue between panellists and participants. For this, we will use a distributed panel approach with panel interventions and buzz groups to facilitate whole room interaction – using the experience, knowledge and expertise of all the participants.

Added value: Understanding finance and investment models together with needs are a fundamental skill for prevention planning that for far too long have been left to determinants outside public health. Our project – and this workshop – intends to help change this harmful dynamic for good.

### **Message 1**

Smart capacitating investment can transform how health promotion and prevention are sustainably funded for regional and local benefit.

### **Message 2**

Multi-stakeholder governance and collaborative action spaces are needed to manage SCI locally, and citizen-patient representation can help build trust

### **Chairperson 1: Prof Joanna Lane**

Chairperson 1

### **Chairperson 2: Ms Caroline Costongs**

Chairperson 2

No. of presentations / panellists: 4

### **Presentation 1**

Type: Panel

Panellist

Joanna Lane

### **Presentation 2**

Type: Panel

Panellist

Caroline Costongs

### **Presentation 3**

Type: Panel

Panellist

Jolanda van Vliet

### **Presentation 4**

Type: Panel

Panellist

Lars Münter