

## MSD Methodology Statement

### Annual disclosure of transfers of value to patient organisations

#### Introduction

This Methodology Statement defines the relevant types of transfers to be disclosed, which transfers are excluded, and other relevant information to assist the reader to understand how MSD collected, organised and reported the disclosed data.

Our 2021 Disclosure will contain data for two separate legal entities. Merck Sharp & Dohme Limited (company number 00820771), now known as Organon Pharma (UK) Limited, will be disclosing for the period 01.01.21 to 02.06.21. Merck Sharp & Dohme (UK) Limited (company number 00233687) will be undertaking disclosure for the period 01.01.21 to 31.12.21.

#### Definitions

Donations and grants – collectively mean providing funds, benefits-in-kind or services freely given for the purpose of supporting healthcare, scientific research or education, with no consequent obligation on the recipient organisation, institution and the like to provide goods or services to the benefit of the pharmaceutical company in return. In general, donations are physical items, services or benefits-in-kind which may be offered or requested. Grants are the provision of funds.

Event – includes all professional, promotional, scientific and educational meetings, congresses, conferences, symposia, and other similar events organised or sponsored by or on behalf of MSD.

Patient Organisation - an organisation mainly comprising of patients and/or caregivers or any user organisation such as a disability organisation, carer or relative organisation and consumer organisation that represents and/or supports the needs of patients and/or caregivers. The term 'individual representing a patient organisation' means a person who is mandated to represent and express the views of a patient organisation

Recipient – any patient organization who receives a direct transfer of value from MSD.

Transfers of Value (ToVs) – means a direct or indirect transfer of value, whether in cash, in kind or otherwise, made, whether for promotional purposes or otherwise, in connection with the development or sale of medicines.

A Direct ToV is one made directly by MSD for the benefit of a Recipient.

An Indirect ToV is one made on behalf of MSD for the benefit of a recipient or through an intermediate and where the company knows or can identify the recipient that will benefit from the transfer of value.

#### Disclosure's scope

Companies must make publicly available annually details of the fees for certain contracted services paid to patient organisations.

Excluded ToVs. ToVs to HCOs and HCPs are covered by a separate disclosure methodology, as required by the Code. The value of reasonable meals and drinks are



excluded from ToV disclosure.

ToV Recognition Date. Direct ToVs are disclosed based on the date the ToV was paid in our finance systems and when the resulting income or benefit was received by the HCO/HCP. Indirect ToVs concerning travel and accommodation are disclosed on the basis of the date that the event took place.

ToV Value. TOV disclosures reflect the actual value or cost provided by MSD and not the resulting income or benefit to the recipient.

Patient Organisation ToVs. The following types of ToVs to Patient Organisations are disclosed by MSD:

- i) Donations, grants and benefits in kind provided to patient organisations;
- ii) Fees for service (and related expenses) provided by one or more individuals representing the patient organization (examples may include speaking at an external or internal MSD event, contribution to the development of educational or campaign material, participation in advisory boards or market research when the identity of the individual is known to MSD, and participation in disease awareness campaigns in the media or elsewhere in the public domain.)
- iii) Payment for contracted services as part of a collaborative project including a patient organisation
- iv) A benefit in kind provided as part of a collaborative project (e.g. agency support)
- v) Corporate sponsorship of an event or activity hosted by a patient organisation
- vi) Corporate membership (typically on an annual basis) of a patient organization or a group hosted by a patient organisation

Contracting with patient organisations. For each of the ToVs above, MSD has a standard contracting mechanism, including a clear agreement of the activity and any services being provided, due diligence checks, transparency and disclosure arrangements and provisions for protection of data privacy.

Quantification of non-monetary ToVs (benefit in kind): where possible, the estimated value of items or services is included in ToV disclosure, based on a reasonable estimation of item value or, in the case of services, the cost to MSD.

ToVs in case of partial attendances or cancellation. Since ToVs are reported on the basis of what MSD paid, and not what the Recipient received, the full amount paid by MSD shall be reported in case of a partial attendance. In case of an individual's cancellation, no ToV will be disclosed.

Cross-border activities. Regardless of which MSD entity contracts with or pays a Recipient, all patient organisations whose main address or place of incorporation is in the United Kingdom are reported by MSD.

Disclosing entities. This annual disclosure report covers all ToVs made to patient organisations in the United Kingdom, whether by Merck Sharp & Dohme (UK) Limited or by its affiliates based in other countries.

### **Time periods**

Disclosure is made on the basis of the year the actual ToV was provided. In the case



of multi-year agreements, the amount that will be disclosed will be the total amount paid by MSD in each year.

### **Collection of ToV data**

MSD tracks both contracts and payment data to capture all forms of ToV (i.e. payment, donation or items and benefit in kind).

### **Disclosure Form**

Date of publication. MSD publishes the ToV for the preceding calendar year no later than 6 months after the end of the relevant reporting period (for example, ToVs for 2021 are reported no later than June 24, 2022). The information disclosed shall remain available for three (3) years thereafter.

Disclosure platform. MSD provides its annual disclosure for patient organisations via the company website for MSD in the UK.

### **Disclosure financial data**

Currency. Most disclosed ToVs are reported in GBP but, where MSD entities outside the UK have contracted the recipient, some payments may be reported in other currencies – typically USD and EUR.

VAT. VAT is included when relevant.

### **Working with other Pharmaceutical Companies**

Transfers of Value are divided between each of the pharmaceutical companies participating in the project.

MSD					
Grants & Donations 2021 - PATIENT ORGANISATIONS					
UNITED KINGDOM					
Name of Beneficiary Institution	Program/Project Description	Contribution Type	Country	Currency	Individual Payment Amount
Action Kidney Cancer (Kidney Cancer Support Network)	Support community outreach patient webinars	Financial Support	UK	GBP	15,000
Africa Advocacy Foundation	Funding in respect of input, review and communications work for the Whole Person Care 50 Over 50 project	Financial Support	UK	GBP	1,500
Africa Advocacy Foundation	Global Public Policy: MI-Care 2021	Financial Support	US	US\$	39,828
African Health Policy Network	Positive Wise is a project that will reach, engage and support 40 BAME elder PLWH in weekly activity based peer support sessions.	Financial Support	UK	GBP	9,050
Alzheimer's Research UK	MRL Conference Meeting Support Alzheimer's Research UK Conference 2021	Financial Support	US	US\$	6,500
Asthma UK & British Lung Foundation Partnership	MSD is a member of the Industries Forum of the Taskforce for Lung Health for which it provides funding of £25,000 to the Asthma UK and British Lung Foundation Partnership who run the taskforce and act as the secretariat. MSD does not expect to gain any material benefit from this funding and is subject to the understanding that it is not an inducement to prescribe, supply, administer, recommend, buy or sell any medicine	Financial Support	UK	GBP	25,000
Asthma UK & British Lung Foundation Partnership	Project to improve education and information on the flu vaccination amongst people with lung disease, particularly those from vulnerable or underrepresented communities.	Financial Support	UK	GBP	15,000
Blue Sky Trust	Supporting the Health & Wellbeing of People Living with HIV in North East England & Cumbria	Financial Support	UK	GBP	8,500
British Society for Antimicrobial Chemotherapy	Support the development of The Mould-Schools Edition	Financial Support	UK	GBP	14,939
Cancer Research UK	Funded delivery of two Talk Cancer live online webinar training workshops for pharmacy staff.	Financial Support	UK	GBP	11,000
Fight Bladder Cancer	Exemplar research project: Striving for exceptional services for people affected by Bladder Cancer	Financial Support	UK	GBP	15,000
Fight Bladder Cancer	Programme of activity aimed at addressing poor health literacy in bladder cancer within deprived communities, working with the GMB Worker's Union to improve the health literacy of its current and former members.	Financial Support	UK	GBP	15,000
Fight Bladder Cancer	Train ticket for Lydia Makaroff recording session for internal health literacy podcast	Financial Support	UK	GBP	42
George House Trust	Project to educate healthcare professionals in the North West who are at the forefront of care provision about HIV with the view to reduce stigma, improve services, empower patients and ensure equity of services across our region.	Financial Support	UK	GBP	15,000
Global Lung Cancer Coalition	Online Lung Cancer Screening Resource, Global Lung Cancer Screening Project The Business Case, Patient Experience Survey, GLCC Member Surveys on Impact of COVID-19, Global State of Lung Cancer Research, Factsheets	Financial Support	UK	GBP	30,000
Guts UK Charity	Programme of awareness raising activities focused on improving the prevention and early diagnosis of oesophageal and gastric cancers, targeted toward socio-economically deprived populations. Insight gathering workshops and the subsequent development of video content, utilising 'storytelling' as a method of raising awareness across traditional and social media.	Financial Support	UK	GBP	14,886
International Alliance of Patients Organizations	Sponsorship at Platinum Level of 2nd Asia-Pacific Patient Congress	Financial Support	US	US\$	50,000
International Alliance of Patients Organizations	(GMA) Non-CE - Asia Pacific Patients Congress 2021	Financial Support	US	US\$	30,000
International Alliance of Patients Organizations	(GMA) Non-CE - Corporate Sponsorship	Financial Support	US	US\$	30,000
Jo's Cervical Cancer Trust	Project is to develop materials to explain what HPV is and provide materials and guidance on how to talk about a HPV positive screening result with a partner.	Financial Support	UK	GBP	15,000
Kidney Cancer UK	Kidney Cancer Accord Quality Performance Indicators Project Sponsorship Support	Financial Support	UK	GBP	15,000
LGBT HERO Health Equality and Rights Organisation Ltd	A series of groupwork, workshops, support sessions and digital interventions support MSM living with HIV to cope with post covid environment, recognising that COVID has brought about an increase in sense of isolation, risky activities such as outdoor sex, chemsex and other risky behaviours, and greater self-harm	Financial Support	UK	GBP	8,935
LGBT HERO	To provide Black Asian and Minority gay/bisexual/trans men living with HIV with 12 online group peer-support and 12 individual sessions to tackle isolation, loneliness and mental wellbeing issues	Financial Support	UK	GBP	5,850
Macmillan Cancer Support	Sponsorship of Macmillan Professionals Conference	Financial Support	UK	GBP	45,000
Macmillan Cancer Support	Licence to use the Macmillan Marks within the UK for the purpose of endorsing the Licensee's Do It For Yourself Lung cancer campaign	Financial Support	UK	GBP	5,000
NAM aidsmap	Pre-recorded series of fitness classes by and for people living with HIV.	Financial Support	UK	GBP	5,780
NAM Publications - Emerging Voices	Support Emerging Voices 2021	Financial Support	US	US\$	21,000
NAM Publications - PrEP in Europe Initiative 2021/2022	Support PrEP in Europe Initiative 2021/2022	Financial Support	US	US\$	41,700
NAM Publications	Funding in respect of input, review and communications work for the Whole Person Care 50 Over 50 project	Financial Support	UK	GBP	1,000
National Aids Trust	HIV 50 over 50 Campaign	Financial Support	UK	GBP	1,300
Pancreatic Cancer UK	Development of an optimal pathway for patients with pancreatic cancer, with the aim of reducing unwarranted variation across geographies in terms of service delivery and patient outcomes	Financial Support	UK	GBP	15,000
Positively UK	Funding in respect of input, review and communications work for the Whole Person Care 50 Over 50 project	Financial Support	UK	GBP	1,500
Positively UK	Pilot a peer-led support package for heterosexuals with the intention of engaging and reaching many men. Heterosexual men in particular lack a safe and inclusive space	Financial Support	UK	GBP	12,674
Pulmonary Hypertension Association UK	Redesign and update of the whole programme, with the input of leading PH professionals to ensure that the content is evidence based and reflects the current practice in PH	Financial Support	UK	GBP	10,000
Shine Cancer Support	Sponsorship of the Shine Cancer Support 2021 Shine Connect conference	Financial Support	UK	GBP	1,000
Shine Cancer Support	Support of HCP workshops to educate HCPs around the specific needs of people with cancer in their 20s, 30s and 40s, and the development of patient information material specific for young adults with incurable cancer.	Financial Support	UK	GBP	8,802
Shine Cancer Support	Support to enable the provision of information and support to healthcare professionals and young adults with cancer	Financial Support	UK	GBP	8,518
Sophia Forum	Honaria for filming Sophie Strachan for Whole Person 50 over 50 film	Financial Support	UK	GBP	200
Sophia Forum	Payment for Sophie Strachan speaker engagement at internal MSD HIV town hall	Financial Support	UK	GBP	175
Sophia Forum	Funding in respect of input, review and communications work for the Whole Person Care 50 Over 50 project	Financial Support	UK	GBP	1,300
Terence Higgins Trust	Funding in respect of input, review and communications work for the Whole Person Care 50 Over 50 project	Financial Support	UK	GBP	1,500
Terence Higgins Trust	Project to create and deliver a series of online resources, including videos and supporting information, and related workshops to engage people living with HIV	Financial Support	UK	GBP	15,000
The Brain Tumour Charity	Development of a new co-designed app-based electronic holistic needs assessment tool to create a personalised support plan for patients with brain tumours and their families and clinicians.	Financial Support	UK	GBP	15,000
The Ernest Foundation	Working to support this community who face specific language, cultural and ethnic barriers via training on building confidence and a 6-week course on self-management.	Financial Support	UK	GBP	5,000
The Eve Appeal	Re-design of Eve Appeal's cancer information programme "Ask Eve" following an evaluation of its services which revealed its user base is predominantly white women. The re-design will aim to address the causes of this imbalance and increase the user base of the "Ask Eve" service amongst minority communities.	Financial Support	UK	GBP	14,980
The Martin Fisher Foundation	Video production to reach non-HIV specialist healthcare workers on HIV messaging including U=U, HIV testing, and HIV prevention messaging.	Financial Support	UK	GBP	6,650
The Swallows Head & Neck Cancer Support Group	MSD have provided funding towards the 2021 Head and Neck Cancer Conference. MSD have had no editorial input into the conference agenda or content.	Financial Support	UK	GBP	5,000
The Swallows Head & Neck Cancer Support Group	MSD have provided funding to The Swallows, as a fee for service, for services provided to MSD related to the MSD developed Head & Neck Cancer Patient Activation through Community Pharmacy video series.	Financial Support	UK	GBP	300
The Swallows Head & Neck Cancer Support Group	Honoraria fee for Chris Curtis, processed by Vicki Bremer for MSD Head and Neck (HNC) Patient Pathway Advisory Board, dated 14 <sup>th</sup> April 2021.	Financial Support	UK	GBP	263
UK CAB c/o HIV iBase	Funding in respect of input, review and communications work for the Whole Person Care 50 Over 50 project	Financial Support	UK	GBP	1,300
UK Community Advisory Board (via HIV i-Base)	MSD co-supported the UK Community Advisory Board, managed by HIV i-Base, during 2021 with a sponsorship of £11,469. Each of the co-supporting pharmaceutical companies, including MSD, is invited to attend UK-CAB meetings from time to time (every 12-18 months) to enable a two-way discussion around some of the key issues in the HIV field.	Financial Support	UK	GBP	11,469
UK Oncology Nursing Society	To provide oncology nurses with an up to date resource on the fundamentals of caring for patients with cancer so that they can better support their patients.	Financial Support	UK	GBP	25,000
Waverley Care	Pilot project to provide a safe space for PWIDU to engage on HIV related issues	Financial Support	UK	GBP	4,830