



MSD Methodology Statement

Annual disclosure of transfers of value to patient organisations and members of the public, including patients and journalists

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.

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. If a Patient Organisation is run by a healthcare professional MSD would classify this as a Healthcare organisation (HCO).

Healthcare Organisation - means either a healthcare, medical or scientific association or organisation such as a hospital, clinic, foundation, university or other teaching institution or learned society whose business address, place of incorporation or primary place of operation is in Europe or an organisation through which one or more health professionals or other relevant decision makers provide services.

Recipient – Any patient organisation or member of the public, including patients and journalists, whose main professional address, place of incorporation or for an individual resides in the United Kingdom who receives a transfer of value from MSD.

Members of the public including patients, patient advocate and carers - (a) Someone who is speaking in a personal capacity, such as a patient, a patient advocate or a caregiver, to educate and inform others about the experiences of patients, the impact of a health condition on patients, their needs and other insights based on personal and/or professional experience with patients; or (b) any other member of the public who is not a Journalist.

Journalist - An individual who is not an HCP and who performs a role of writing, presenting or communicating via an informational or news website, print media (newspaper, magazine etc) or broadcast media (TV, radio etc), or who is engaged in the preparation of any of the foregoing. This role may be performed on an employed, self-employed or voluntary basis.

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

Excluded ToVs. ToVs to HCOs and HCPs are covered by a separate disclosure methodology, as required by the Code.

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 recipient. Indirect ToVs for expenses such as 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 organisation (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

Members of the Public, including patients and journalists: The following types of ToVs to individuals are disclosed by MSD:

- i) Fees for services and consultancy (examples include speaker fees, speaker training, development of educational or patient materials, general consulting and advising via advisory boards/expert input forums, fees for participating in market research where the identity of the participant is known to MSD; and
- ii) Travel and accommodation (such as costs of flights, trains, car hire, tolls, parking fees, taxis and hotel accommodation)

For members of the public, patients and journalists disclosures are aggregated. Disclosure is not made against individuals.

Corporate Memberships: The following types of ToVs to corporate organisations are disclosed by MSD in a separate report which is available on the company website for MSD in the UK:

- i) Corporate memberships to academic/medical institution, professional body, think tank or charity

Contracting with patient organisations and members of the public. 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. ToVs are reported on the basis of what MSD paid, and not what the Recipient did or how long they attended. In case of an individual's cancellation and therefore no payment or ToV, there would be no disclosure.

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 and members of the public, including patients and journalists in the United Kingdom, whether by Merck Sharp & Dohme (UK) Limited, MSD R&D Innovation Centre 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).

Legal Basis. Data privacy laws in the UK (the "UK GDPR") mean that to process personal information about an individual, MSD must identify an appropriate lawful basis before they do so. MSD processes the personal information based on its legitimate interests in the transparency of interactions between MSD, patient organisations, patients, members of the public and journalists. This will enable MSD to be as transparent as possible about the nature and scale of its interactions. MSD has made all recipients in the United Kingdom aware of this through the completion of a due diligence certification prior to the provision of any ToV.

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 are reported no later than June of the following year). The information disclosed shall remain available for three (3) years thereafter.

Disclosure platform. MSD provides its annual disclosure for patient organisations and members of the public, including patients and journalists 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

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

ABPI CODE OF PRACTICE 2024											
Optional Disclosure Template for Patient Organisations and the Public including Patients and Journalists											
LAST REVIEWED 02/04/2025	Companies must include a note of methodologies used in preparing the disclosures										
	Patient Organisation Name	Country	Types of the Support or Services Provided								
			Financial Support			Non-financial Support		Contracted Services			
			Grants add a line for each Grant	Sponsorship of Meetings add a line for each sponsorship	Other Sponsorships add a line for each sponsorship	Donations add a line for each donation	Fees	Out of pocket/ expenses	Non-monetary Benefit for PO ²	Optional Indication of Patient Organisation's Total Income and/or the Company's Support as a Percentage	Description of Services
Patient Organisation (add additional table for each Patient Organisation)	Africa Advocacy Foundation	UK					£500				Fee for service for an MSD sponsored symposium at the Autumn BHIVA Conference 2024
	Africa Advocacy Foundation	UK					£1,125				Fee for service for participation in the MSD-led coalition the "Whole Person Care Partnership"
	Alzheimer's Research UK	UK		\$5,000							Sponsorship to support venue costs for Alzheimer's Research UK Conference 2024 held in Liverpool
	Antibiotic Research UK	UK	£19,799								Grant to support creation of patient case studies of those who have been affected by antibiotic resistance
	Blood Cancer UK	UK	£15,000								Grant to support improving the diagnosis experience for every blood cancer patient in the UK
	Body & Soul	UK	£15,000								Grant to support Body & Soul's "Positive Parents" Place Programme
	Centre for Population Health	UK	£10,000								Grant to support "Making it Happen" November Conference
	Children's HIV Association CHIVA	UK	£15,000								Grant to support a residential project aimed to support young people living with HIV
	4M Mentor Mothers	UK	£11,100								Grant to support a project to address health inequalities faced by black migrant women living with HIV
	International Alliance of Patients' Organizations	UK	\$120,000								Grant to support a Personalised Cancer Care Alliance initiating the Gender Working Group
	Jo's Cervical Cancer Trust	UK					£2,000	£546.71			Speaker fee for Race to Elimination National Parliamentary Event
	Kidney Cancer UK	UK					£60	£33.80			Speaker fee for internal town hall to mark Kidney Cancer Awareness Week
	Kidney Cancer UK	UK			£20,125						Sponsorship of Kidney Cancer UK's National 3- year Kidney Cancer Awareness Campaign
	Leanne Pero Foundation	UK		£20,000							Sponsorship of the Leanne Pero Foundation live podcast show
	Make 2nds Count	UK	£10,054								Grant to support HCPs to understand the services available to support clinical trials so that patients are empowered to actively participate in their healthcare decisions.
	Make 2nds Count	UK	£20,000								Grant to support Secondary Breast Cancer Summit
	National AIDS Trust	UK	£9,486								Grant to support a formula milk campaign for parents living with HIV
	National AIDS Trust	UK					£1,125				Fee for service for participation in the MSD-led coalition the "Whole Person Care Partnership"
	NAZ London	UK					£1,125				Fee for service for participation in the MSD-led coalition the "Whole Person Care Partnership"
	NAZ London	UK	£14,344								Grant to support a project for a caseworker to work directly with Latin Americans living with HIV.
	Peaches Womb Cancer Trust	UK	£15,000								Grant to support First Support Service for womb cancer patients

	Positive East	UK			£7,500	£1,269.84					Sponsorship of World AIDS Day RED RUN 2024 and MSD employee volunteering
	Positive East	UK					£1,125				Fee for service for participation in the MSD-led coalition the "Whole Person Care Partnership"
	Positively UK	UK					£1,125				Fee for service for participation in the MSD-led coalition the "Whole Person Care Partnership"
	Positively UK	UK					£500				Fee for service for an MSD sponsored symposium at the Autumn BHIVA Conference 2024
	Roy Castle Lung Cancer Foundation	UK					£380	£372.82			Speaker fee at Internal Town Hall during Lung Cancer Awareness Month
	Roy Castle Lung Cancer Foundation	UK					£1,330				Fee for service to work with MSD on Lung Cancer Carer booklet
	Roy Castle Lung Cancer Foundation	UK	£30,000								Grant to support Global Lung Cancer Coalition workplan
	Sophia Forum	UK					£1,125				Fee for service for participation in the MSD-led coalition the "Whole Person Care Partnership"
	Terrence Higgins Trust	UK					£1,125				Fee for service for participation in the MSD-led coalition the "Whole Person Care Partnership"
	The Eve Appeal	UK					£2,000	£104.49			Fee for service for participation in Race to Elimination Scotland Parliamentary Event
	UK-CAB c/o HIV i-Base	UK					£1,125				Fee for service for participation in the MSD-led coalition the "Whole Person Care Partnership"
	UK-CAB c/o Positively UK	UK					£500	£969.58			Fee for service for an MSD sponsored symposium at the Autumn BHIVA Conference 2024
	Waverley Care	UK	£12,549								Grant to support a project delivering peer to peer support for people living with HIV in Scotland
Members of the Public	Description of Services: This includes fees and expenses for contracted services including internal and external speaker and meeting engagements.						N/A	N/A	N/A	N/A	N/A
	Aggregate amount attributable to transfers of value to such Recipients						£9,121	\$20,126.77 + £1,767.17	N/A	N/A	N/A
	Number of Recipients in aggregate disclosure						16	8	N/A	N/A	N/A
Patients	Description of Services: This includes fees and expenses for contracted services including speakers for internal or external events and provision of patient insights and feedback on development of patient materials.						N/A	N/A	N/A	N/A	N/A
	Aggregate amount attributable to transfers of value to such Recipients						£5,520	£1,103	N/A	N/A	N/A
	Number of Recipients in aggregate disclosure						16	8	N/A	N/A	N/A
Journalists	Description of Services						N/A	N/A	N/A	N/A	N/A
	Aggregate amount attributable to transfers of value to such Recipients						0	0	N/A	N/A	N/A
	Number of Recipients in aggregate disclosure						0	0	N/A	N/A	N/A