



## **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

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 - Someone who is speaking in a personal capacity, 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.

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. The value of 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 recipient. 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 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, disclosures are aggregated into patients and journalists. Disclosure is not made against individuals.

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. 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 and members of the public, including patients and journalists 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).

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 for 2022 are reported no later than June 24, 2023). 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 2022  
DISCLOSURE FOR PATIENT ORGANISATIONS (POs) AND THE PUBLIC**

Methodologies used in preparing the disclosures attached

NOT UPDATED SINCE 2021

Patient Organisation Name (add additional table for each Patient Organisation)		Country	Types of the Support or Services Provided		Monetary Value of Financial Support and of Invoiced Costs	Description of Support <sup>1</sup>	Non-monetary Benefits for PO <sup>2</sup>	Other Indication of Patient Organisation's Support as a Percentage	Fees for Services/ Expenses
Action Kidney Cancer	United Kingdom	Financial Support	Grant	£10,000	2022 AbbVie/ AstraZeneca Report	Not applicable	Not applicable	Not applicable	
			Sponsorship of Meetings add a line for each sponsorship						
			Other Sponsorships add a line for each sponsorship						
			Non-Financial Support						
			Contracted Services						
Fees and expenses should be disclosed separately	Out of pocket/ expenses	Not applicable							
Africa Advocacy Foundation	United Kingdom	Financial Support	Grant	£40,000	Global Public Policy M&C 2022	Not applicable	Not applicable	Not applicable	
			Sponsorship of Meetings add a line for each sponsorship						
			Other Sponsorships add a line for each sponsorship						
			Non-Financial Support						
			Contracted Services						
Fees and expenses should be disclosed separately	Out of pocket/ expenses	Not applicable							
Asthma's Research UK	United Kingdom	Financial Support	Grant	£6,000	NHS Conference Meeting Support - Asthma's Research UK Conference 2022	Not applicable	Not applicable	Not applicable	
			Sponsorship of Meetings add a line for each sponsorship						
			Other Sponsorships add a line for each sponsorship						
			Non-Financial Support						
			Contracted Services						
Fees and expenses should be disclosed separately	Out of pocket/ expenses	Not applicable							
Breastline Trust	United Kingdom	Financial Support	Grant		Breastline Trust	Not applicable	Not applicable	Not applicable	
			Sponsorship of Meetings add a line for each sponsorship						
			Other Sponsorships add a line for each sponsorship						
			Non-Financial Support						
			Contracted Services						
Fees and expenses should be disclosed separately	Out of pocket/ expenses	Not applicable							
Cancer Focus Network	United Kingdom	Financial Support	Grant	£2,000	Funding to support Patient Awareness Leaflets	Not applicable	Not applicable	£1,000	
			Sponsorship of Meetings add a line for each sponsorship						
			Other Sponsorships add a line for each sponsorship						
			Non-Financial Support						
			Contracted Services						
Fees and expenses should be disclosed separately	Out of pocket/ expenses	Not applicable							
Kid of Life Partnership	United Kingdom	Financial Support	Grant	£200	Kid of Life Partnership	Not applicable	Not applicable	Not applicable	
			Sponsorship of Meetings add a line for each sponsorship						
			Other Sponsorships add a line for each sponsorship						
			Non-Financial Support						
			Contracted Services						
Fees and expenses should be disclosed separately	Out of pocket/ expenses	Not applicable							
Global Lung Cancer Coalition	United Kingdom	Financial Support	Grant	£30,000	Support of the Global Lung Cancer Coalition (GLCC) - 2022	Not applicable	Not applicable	Not applicable	
			Sponsorship of Meetings add a line for each sponsorship						
			Other Sponsorships add a line for each sponsorship						
			Non-Financial Support						
			Contracted Services						
Fees and expenses should be disclosed separately	Out of pocket/ expenses	Not applicable							
International Alliance of Patient Organisations	United Kingdom	Financial Support	Grant	£30,000	Grant Sponsorship - Corporate Funding / Advertising knowledge and providing information and support to diverse groups to patient organisations to be able to engage in advocacy that helps to achieve patient centric healthcare that is safe, quality, equitable, accessible, affordable and non-discriminatory	Not applicable	Not applicable	Not applicable	
			Sponsorship of Meetings add a line for each sponsorship						
			Other Sponsorships add a line for each sponsorship						
			Non-Financial Support						
			Contracted Services						
Fees and expenses should be disclosed separately	Out of pocket/ expenses	Not applicable							
Malignia UK	United Kingdom	Financial Support	Grant		Malignia UK	Not applicable	Not applicable	Not applicable	
			Sponsorship of Meetings add a line for each sponsorship						
			Other Sponsorships add a line for each sponsorship						
			Non-Financial Support						
			Contracted Services						
Fees and expenses should be disclosed separately	Out of pocket/ expenses	Not applicable							
NAM Publication	United Kingdom	Financial Support	Grant	£40,000	Global Public Policy - Emerging Values in 2022	Not applicable	Not applicable	Not applicable	
			Sponsorship of Meetings add a line for each sponsorship						
			Other Sponsorships add a line for each sponsorship						
			Non-Financial Support						
			Contracted Services						
Fees and expenses should be disclosed separately	Out of pocket/ expenses	Not applicable							
NHS	United Kingdom	Financial Support	Grant		NHS	Not applicable	Not applicable	Not applicable	
			Sponsorship of Meetings add a line for each sponsorship						
			Other Sponsorships add a line for each sponsorship						
			Non-Financial Support						
			Contracted Services						
Fees and expenses should be disclosed separately	Out of pocket/ expenses	Not applicable							
Positive Diet	United Kingdom	Financial Support	Grant	£7,000	2022 World AIDS Day NHS Book	Not applicable	Not applicable	Not applicable	
			Sponsorship of Meetings add a line for each sponsorship						
			Other Sponsorships add a line for each sponsorship						
			Non-Financial Support						
			Contracted Services						
Fees and expenses should be disclosed separately	Out of pocket/ expenses	Not applicable							
Prostate Cancer UK	United Kingdom	Financial Support	Grant	£20,000	Wellness UK Project	Not applicable	Not applicable	Not applicable	
			Sponsorship of Meetings add a line for each sponsorship						
			Other Sponsorships add a line for each sponsorship						
			Non-Financial Support						
			Contracted Services						
Fees and expenses should be disclosed separately	Out of pocket/ expenses	Not applicable							
Blue Cancer Support	United Kingdom	Financial Support	Grant	£2,000.00	Blue Connect conference	Not applicable	Not applicable	Not applicable	
			Sponsorship of Meetings add a line for each sponsorship						
			Other Sponsorships add a line for each sponsorship						
			Non-Financial Support						
			Contracted Services						
Fees and expenses should be disclosed separately	Out of pocket/ expenses	Not applicable							
The SouthWest Head and Neck Cancer	United Kingdom	Financial Support	Grant	£1,000.00	The SouthWest Annual Head and Neck Cancer conference	Not applicable	Not applicable	Not applicable	
			Sponsorship of Meetings add a line for each sponsorship						
			Other Sponsorships add a line for each sponsorship						
			Non-Financial Support						
			Contracted Services						
Fees and expenses should be disclosed separately	Out of pocket/ expenses	Not applicable							
Venice Helix Trust	United Kingdom	Financial Support	Grant	£4,164.47	NHS Prostate UK conference	Not applicable	Not applicable	Not applicable	
			Sponsorship of Meetings add a line for each sponsorship						
			Other Sponsorships add a line for each sponsorship						
			Non-Financial Support						
			Contracted Services						
Fees and expenses should be disclosed separately	Out of pocket/ expenses	Not applicable							

**Annual Disclosure of Contracted Services Provide by The Public**

Number of Members of the Public / Journalists Contracted	Country	Contracted Services Provided	Description of Support <sup>1</sup>	Fees for Services/ Expenses
Members of the Public	6	UK Contracted Services Fees and expenses should be disclosed separately add a line for each different service provided	Not applicable	Not applicable
Patients	13	UK Contracted Services Fees and expenses should be disclosed separately add a line for each different service provided	Speech to MED staff at MED internal meetings	£2,000
Journalists	1	UK Contracted Services Fees and expenses should be disclosed separately add a line for each different service provided	Research, prepare for and conduct a webinar panel discussion on integrated care systems and cancer outcomes, recorded 6 November 2022, and writing on the event	£1,000