



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 - 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.

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. 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, 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 for 2023 are reported no later than June 24, 2024). 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 2023
DISCLOSURE FOR PATIENT ORGANISATIONS (POs) AND THE PUBLIC**

Methodologies used in preparing the disclosures attached

LAST UPDATED 14/05/2024

Annual Disclosure of Support Provided to Patient Organisations and Contracted Services Provided by Individuals Representing Patients Organisations

| Patient Organisation Name | Country | Types of the Support or Services Provided | Monetary Value of Financial Support and of Invoiced Costs | Description of Support | Non-monetary Benefit for PO | Optional Indication of Patient Organisation's Total Income and/or the Company's Support as a Percentage | Fees for Services/ Expenses |
|---|---------|--|---|--|-----------------------------|---|-----------------------------|
| Action Kidney Cancer | UK | Grants add a line for each Grant | | | | | |
| | | Financial Support | | | | | |
| | | Sponsorship of Meetings add a line for each sponsorship | | | | | |
| | | Other Sponsorships add a line for each sponsorship | £15,000 | Ask the Expert video sponsorship | Not applicable | | Not applicable |
| | | Non-financial Support add a line for each donation | | | | | |
| Africa Advocacy Foundation | UK | Grants add a line for each Grant | £40,000 | Global Public Policy Mx Health Europe 2023 | | | |
| | | Financial Support | | | | | |
| | | Sponsorship of Meetings add a line for each sponsorship | | | | | |
| | | Other Sponsorships add a line for each sponsorship | | | | | |
| | | Non-financial Support add a line for each donation | | | | | |
| African Health Policy Network | UK | Grants add a line for each Grant | £6,670 | Fleets Reach Project | | | |
| | | Financial Support | | | | | |
| | | Sponsorship of Meetings add a line for each sponsorship | | | | | |
| | | Other Sponsorships add a line for each sponsorship | | | | | |
| | | Non-financial Support add a line for each donation | | | | | |
| Blood Cancer UK | UK | Grants add a line for each Grant | £7,500 | Report "Blood Cancer Action Plan" (BCAP) | | | |
| | | Financial Support | | | | | |
| | | Sponsorship of Meetings add a line for each sponsorship | | | | | |
| | | Other Sponsorships add a line for each sponsorship | | | | | |
| | | Non-financial Support add a line for each donation | | | | | |
| Fight Bladder Cancer | UK | Grants add a line for each Grant | | | | | |
| | | Financial Support | | | | | |
| | | Sponsorship of Meetings add a line for each sponsorship | | | | | |
| | | Other Sponsorships add a line for each sponsorship | | | | | |
| | | Non-financial Support add a line for each donation | | | | | |
| Head and Neck Cancer Coalition | UK | Grants add a line for each Grant | £21,000.00 | Sponsorship of PAC Coalition | | | |
| | | Financial Support | | | | | |
| | | Sponsorship of Meetings add a line for each sponsorship | | | | | |
| | | Other Sponsorships add a line for each sponsorship | | | | | |
| | | Non-financial Support add a line for each donation | | | | | |
| HePC Trust | UK | Grants add a line for each Grant | £7,500 | Effective engagement to deliver improvements across the cancer patient pathway | | | |
| | | Financial Support | | | | | |
| | | Sponsorship of Meetings add a line for each sponsorship | | | | | |
| | | Other Sponsorships add a line for each sponsorship | | | | | |
| | | Non-financial Support add a line for each donation | | | | | |
| International Alliance of Patient Organisations | UK | Grants add a line for each Grant | £40,000 | Personalised Cancer Care Alliance | | | |
| | | Financial Support | | | | | |
| | | Sponsorship of Meetings add a line for each sponsorship | | | | | |
| | | Other Sponsorships add a line for each sponsorship | | | | | |
| | | Non-financial Support add a line for each donation | | | | | |
| It's Cervical Cancer Trust | UK | Grants add a line for each Grant | | | | | |
| | | Financial Support | | | | | |
| | | Sponsorship of Meetings add a line for each sponsorship | | | | | |
| | | Other Sponsorships add a line for each sponsorship | | | | | |
| | | Non-financial Support add a line for each donation | | | | | |
| Nation AIDS Trust | UK | Grants add a line for each Grant | | | | | |
| | | Financial Support | | | | | |
| | | Sponsorship of Meetings add a line for each sponsorship | | | | | |
| | | Other Sponsorships add a line for each sponsorship | | | | | |
| | | Non-financial Support add a line for each donation | | | | | |
| New Project London | UK | Grants add a line for each Grant | | | | | |
| | | Financial Support | | | | | |
| | | Sponsorship of Meetings add a line for each sponsorship | | | | | |
| | | Other Sponsorships add a line for each sponsorship | | | | | |
| | | Non-financial Support add a line for each donation | | | | | |
| Orchid Cancer Appeal | UK | Grants add a line for each Grant | £7,500 | Testicular Cancer Awareness Film & Social Media Campaign | | | |
| | | Financial Support | | | | | |
| | | Sponsorship of Meetings add a line for each sponsorship | | | | | |
| | | Other Sponsorships add a line for each sponsorship | | | | | |
| | | Non-financial Support add a line for each donation | | | | | |
| Positive East | UK | Grants add a line for each Grant | £7500 | World AIDS Day Red Run London | | | |
| | | Financial Support | | | | | |
| | | Sponsorship of Meetings add a line for each sponsorship | | | | | |
| | | Other Sponsorships add a line for each sponsorship | | | | | |
| | | Non-financial Support add a line for each donation | £1,172 | Employee volunteering hours to prepare for the Red Run event | | | |
| Positively UK | UK | Grants add a line for each Grant | | | | | |
| | | Financial Support | | | | | |
| | | Sponsorship of Meetings add a line for each sponsorship | £5,000 | "Manifesto of people living with HIV" and it's launch within Parliament | | | |
| | | Other Sponsorships add a line for each sponsorship | | | | | |
| | | Non-financial Support add a line for each donation | | | | | |

| | | | | | | | | |
|---------------------------------------|----|---|--|----------------|---|----------------|--|----------------|
| | | Financial Support | Sponsorship of Meetings add a line for each sponsorship | £11,200 | Conference of people living with HIV 2024 | Not applicable | | Not applicable |
| | | | Other Sponsorships add a line for each sponsorship | | | | | |
| | | Non-financial Support | Donations add a line for each donation | | | | | |
| | | Contracted Services (Fees and expenses should be disclosed separately) | Fees | | Participation on whole person care programme | Not applicable | | £1,500 |
| | | | Out of pocket expenses | Not applicable | | | | |
| | | | Grants add a line for each Grant | | | | | Not applicable |
| Pulmonary Hypertension Association UK | UK | Financial Support | Sponsorship of Meetings add a line for each sponsorship | £7,200 | Gold sponsorship of the national pulmonary hypertension research forum | Not applicable | | |
| | | | Other Sponsorships add a line for each sponsorship | | | | | |
| | | Non-financial Support | Donations add a line for each donation | | | | | |
| | | Contracted Services (Fees and expenses should be disclosed separately) | Fees | | Ad Board | | | 2,700 |
| | | | Out of pocket expenses | Not applicable | Diagnosis Meeting | Not applicable | | 2,250 |
| | | | Grants add a line for each Grant | | | | | |
| Ray Castle Lung Cancer Foundation | UK | Financial Support | Sponsorship of Meetings add a line for each sponsorship | | | Not applicable | | Not applicable |
| | | | Other Sponsorships add a line for each sponsorship | | | | | |
| | | Non-financial Support | Donations add a line for each donation | | | | | |
| | | Contracted Services (Fees and expenses should be disclosed separately) | Fees | Not applicable | Speaker at Houses of Parliament event | Not applicable | | £6,000 |
| | | | Out of pocket expenses | | | | | |
| Shine Cancer Support | UK | Financial Support | Grants add a line for each Grant | £6,978.00 | Support for adults in their 20s, 30s and 40s who have experienced a cancer diagnosis | Not applicable | | Not applicable |
| | | | Sponsorship of Meetings add a line for each sponsorship | | | | | |
| | | | Other Sponsorships add a line for each sponsorship | | | | | |
| | | Non-financial Support | Donations add a line for each donation | | | | | |
| | | Contracted Services (Fees and expenses should be disclosed separately) | Fees | Not applicable | | Not applicable | | |
| | | | Out of pocket expenses | | | | | |
| Sophia Forum | UK | Financial Support | Grants add a line for each Grant | £7,445 | WISE UP, HIV & Bone Health Resource, and Dissemination | Not applicable | | Not applicable |
| | | | Sponsorship of Meetings add a line for each sponsorship | | | | | |
| | | | Other Sponsorships add a line for each sponsorship | | | | | |
| | | Non-financial Support | Donations add a line for each donation | | | | | |
| | | Contracted Services (Fees and expenses should be disclosed separately) | Fees | Not applicable | Participation on whole person care programme | Not applicable | | £1,500 |
| | | | Out of pocket expenses | | | | | |
| Tenacious Cancer Care | UK | Financial Support | Grants add a line for each Grant | £6,300.00 | Roundtable and parliamentary event | Not applicable | | Not applicable |
| | | | Sponsorship of Meetings add a line for each sponsorship | | | | | |
| | | | Other Sponsorships add a line for each sponsorship | | | | | |
| | | Non-financial Support | Donations add a line for each donation | | | | | |
| | | Contracted Services (Fees and expenses should be disclosed separately) | Fees | Not applicable | | Not applicable | | |
| | | | Out of pocket expenses | | | | | |
| Terrance Higgins Trust | UK | Financial Support | Grants add a line for each Grant | £2,000 | "Fighting HIV stigma and proud" march | Not applicable | | Not applicable |
| | | | Sponsorship of Meetings add a line for each sponsorship | | | | | |
| | | | Other Sponsorships add a line for each sponsorship | | | | | |
| | | Non-financial Support | Donations add a line for each donation | | | | | |
| | | Contracted Services (Fees and expenses should be disclosed separately) | Fees | Not applicable | ITN Productions film marking the 50th anniversary of the NHS and the prevention/elimination of HepC, new transmissions of HIV and cervical cancer | Not applicable | | £285 |
| | | | Out of pocket expenses | | Participation on whole person care programme | Not applicable | | £1,500 |
| | | | Grants add a line for each Grant | | | | | |
| Trekback | UK | Financial Support | Sponsorship of Meetings add a line for each sponsorship | £7,500 | Cancer support for people in their 20s or 30s | Not applicable | | Not applicable |
| | | | Other Sponsorships add a line for each sponsorship | | | | | |
| | | Non-financial Support | Donations add a line for each donation | | | | | |
| | | Contracted Services (Fees and expenses should be disclosed separately) | Fees | Not applicable | | Not applicable | | |
| | | | Out of pocket expenses | | | | | |
| UK-CAB | UK | Financial Support | Grants add a line for each Grant | £15,725 | UK Community Advisory Board | Not applicable | | Not applicable |
| | | | Sponsorship of Meetings add a line for each sponsorship | | | | | |
| | | | Other Sponsorships add a line for each sponsorship | | | | | |
| | | Non-financial Support | Donations add a line for each donation | | | | | |
| | | Contracted Services (Fees and expenses should be disclosed separately) | Fees | Not applicable | Participation on whole person care programme | Not applicable | | £1,500 |
| | | | Out of pocket expenses | | | | | |
| White Ribbon Alliance | UK | Financial Support | Grants add a line for each Grant | £60,000 | Penetration Cancer Care Alliance | Not applicable | | Not applicable |
| | | | Sponsorship of Meetings add a line for each sponsorship | | | | | |
| | | | Other Sponsorships add a line for each sponsorship | | | | | |
| | | Non-financial Support | Donations add a line for each donation | | | | | |
| | | Contracted Services (Fees and expenses should be disclosed separately) | Fees | Not applicable | | Not applicable | | |
| | | | Out of pocket expenses | | | | | |

Annual Disclosure of Contracted Services Provide by The Public

| | Number of Members of the Public/Patients/Journa lists Contracted | Country | Contracted Services Provided | | | Description of Support ¹ | | Fees for Services/ Expenses |
|-----------------------|--|---------|---|------------------------|----------------|--|----------------|-----------------------------|
| Members of the Public | 3 | UK | Contracted Services (Fees and expenses should be disclosed separately) add a line for each different service provided | Fees | Not applicable | Consultancy | Not applicable | £12,581 |
| | 13 | | | Fees | | Research & Development | | £40,324 |
| | 7 | | | Out of pocket expenses | | Travel, Accommodation | | £713 |
| Patients | 29 | UK | Contracted Services (Fees and expenses should be disclosed separately) add a line for each different service provided | Fees | | Speaker fees and videos | | £11,705 |
| | 15 | | | Out of pocket expenses | | Travel | | £1,945 |
| Journalists | 1 | UK | Contracted Services (Fees and expenses should be disclosed separately) add a line for each different service provided | Fees | | Hosting a panel debate on the role of integrated care board in delivering services for older people living with HIV | | £1,200 |
| | 3 | | | Out of pocket expenses | | Accommodation and travel to attend a media event to inform on MSF's manufacturing capabilities and approach to R&D. Bookings managed by MSF, no expenses or direct payment to journalists permitted. | | £1,655 |