

**Pfizer 2023**

**Methodology Note Supporting  
The Disclosure Report For  
Transfers Of Value For Patient  
Organisations In 2022**

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## **1. Introduction - Pfizer's Commitment to Transparency Reporting**

Patient organisations (also referred to as Patient Advisory Groups (PAGs), Healthcare Charities or Patient Groups) can take many forms, but largely aim to improve the lives of people with a particular disease or medical condition. As well as supporting their activities, working with patient organisations can help us have a better understanding of the specific needs of patients and how we can better support these needs. By obtaining patient insights, we gain a better understanding of the burden of disease, which informs our efforts to develop medicines and support programs for the patient community.

In providing funding or working with patient organisations, Pfizer's guiding principle is to ensure that the organisation's independence is never compromised. We feel passionately that relationships with patient organisations are both valuable and essential, and by operating with a high degree of transparency, we can be confident and proud of the relationships we have developed. Sharing information about these relationships in a straightforward and open way will, we hope, help explain the critical value these relationships bring to patient management.

We believe that transparency is essential to building and maintaining confidence in us and in our medicines and strongly support the work being done by The European Federation of Pharmaceutical Industries and Associations (EFPIA) to improve transparency across the pharmaceutical industry.

This methodological note presents how the transfers of value are categorized and in what format they are disclosed.

## 2. Transfer of Value Categories

The following table defines what transfers of value are reported in which EFPIA category and subcategory.

EFPIA Category	Example Activities
Financial support	<ul style="list-style-type: none"> <li>• Charitable contributions</li> <li>• Educational grants</li> <li>• Sponsoring of speakers/faculty which by nature of purpose and funding are classified under educational grants</li> <li>• Placement of a brand logo in a conference program or invitation communication in exchange for supporting the program</li> <li>• Funding an event in return for a display booth and/or advertising space</li> <li>• Other advertisement space (in paper, electronic or other format)</li> <li>• Any other activity qualified as “Corporate Sponsorship” according to Pfizer’s Anti-Corruption Policies</li> <li>• Sponsoring of speaker/faculty and sponsoring courses provided by an PO which are qualified as “Corporate Sponsorship” according Pfizer’s Anti-Corruption Policies</li> </ul>
Non-financial support	<ul style="list-style-type: none"> <li>• In-kind donations (e.g. colleague time, product, equipment,</li> </ul>
Contracted services & Related expenses	<ul style="list-style-type: none"> <li>• speaking at meetings</li> <li>• assistance with training</li> <li>• writing articles and/or publications</li> <li>• participating in advisory boards</li> <li>• advising on the design etc of clinical trials</li> <li>• participating in market research where such participation involves remuneration and/or travel</li> <li>• Travel (e.g. flight, train, taxi, car hires, tolls, mileage reimbursement, parking)</li> <li>• Accommodation</li> </ul>

### **3. Definitions**

**PO/PAG** – Patient Organisation/Patient Advocacy Group. A non-for-profit legal person/entity (including the umbrella organisation to which it belongs), mainly composed of patients and/or caregivers, that represents and/or supports the needs of patients and/or caregivers and whose business address, place of incorporation or primary place of operation is in Europe

**TOV:** Transfer of Value - Direct and indirect TOV, whether in cash, in kind or otherwise, made, whether for promotional purposes or otherwise, in connection with the development and sale of prescription only medicine exclusively for human use. Direct TOVs are those made directly by a Member Company for the benefit of a Recipient. Indirect TOVs are those made on behalf of a Member Company for the benefit of a Recipient, or those made through a Third Party and where the Member Company knows or can identify the Recipient that will benefit from the Transfer of Value

## 4. Scope of Disclosure

This report includes transfers of value processed by Pfizer legal entities during the reporting period for 2022. The report may also include transfers of value initiated by Pfizer Upjohn during the same period.

**Timing of TOV:** The disclosure report includes transactions which have a reportable date within the reporting period being disclosed.

**Reportable date:** the dates to be considered for disclosure reports are as follows:

**In Cash TOV's** – the clearing date is the reportable date

**In Kind TOV's** – benefit in kind donation: delivery date is the reportable date

**Multi-year contracts:** Where contracts are valid for more than one year, each individual TOV is captured and disclosed in the reportable disclosure period.

**Cross Border Reporting - TOV from Pfizer legal entities in other countries:** The disclosure report includes TOV to PO/PAGs in the disclosure report country. This includes all TOV (direct and indirect) made by any Pfizer affiliates in the European countries included in the EFPIA disclosure code. For non EFPIA countries, Pfizer will make its best effort to collect and disclose direct TOV made by Pfizer affiliates.

**Currency:** TOV are reported in local currency on the disclosure report. TOV 's made in a non-local currency are converted to local currency prior to publication. The Pfizer standard exchange rates for the TOV on the day of payment are applied.

**Disclosure language:** Disclosure reports will be published using the language as defined by the local trade association code/law.

**Value Added Tax (VAT):** Treatment of VAT depends on the TOV:

Where possible In kind related TOV's will be reported **including tax**

Where possible Direct payment TOV's will be reported **excluding tax**

## 5. Publication

**Publication/Republication:** Pfizer will publish transparency disclosure reports in line with country timelines as defined by the trade association or government. Republication will be carried out as and when needed in line with local codes/laws.