

Independent Evaluation of the Access to Medicine Foundation

Executive Summary

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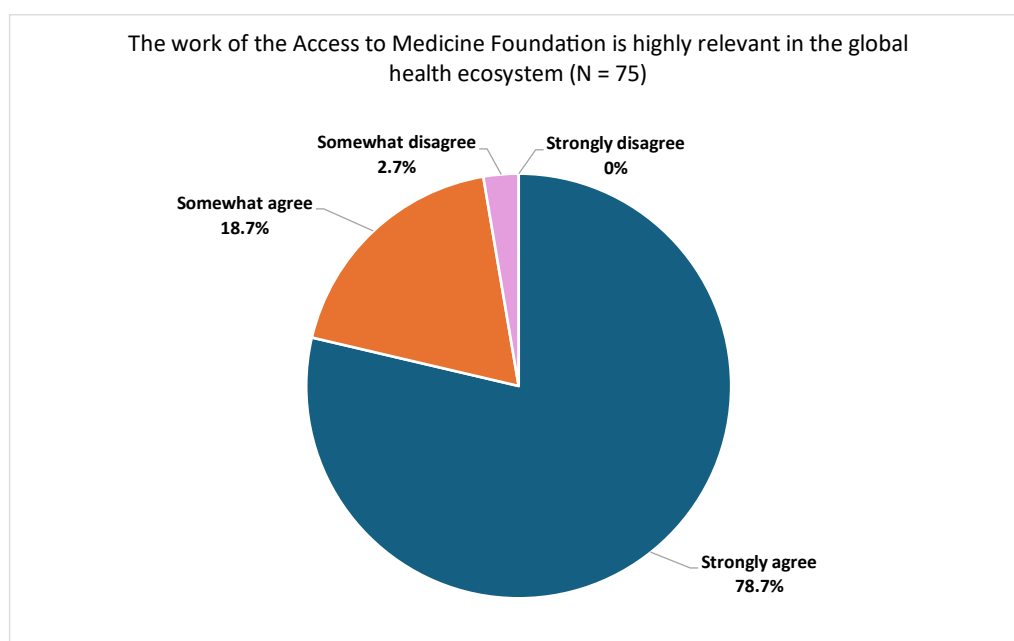
The Access to Medicine Foundation (the “Foundation”) has commissioned Open Consultants to conduct an independent evaluation of the Foundation and its influence and impact on guiding and incentivising pharmaceutical companies to improve access to medicine in low- and middle-income countries (LMICs) and limit drug-resistant infections globally.

This evaluation is the first that analysed the entire spectrum of the Foundation’s work. The evaluation assessed the Access to Medicine Index (the “Index”), which ranks 20 of the largest research-based pharmaceutical companies’ efforts to expand access to medicine in LMICs and aims to contribute to consensus building and learning across the global health ecosystem. The evaluation also analysed the Foundation’s work and influence on two cross-sector programmes: antimicrobial resistance (AMR) and diabetes. It also reviewed the Foundation’s work on generic and biosimilar manufacturers and medical oxygen companies, and its overall impact on change in these different sectors. The evaluation is based on insights and data from key informant interviews with over 80 stakeholders of the Foundation worldwide, a document review, and a value for money assessment, which applied the “4E” framework (Economy, Efficiency, Effectiveness and Equity) and used benefit-cost modelling and benchmarking. Main findings from the evaluation are presented below.

Relevance of the Foundation

The work of the Foundation is highly relevant and unique in the global health ecosystem. There is strong consensus across key informants that the Foundation’s work on access is very relevant in the global health ecosystem (97% agreement; N = 75; Figure ES1). According to key informants, the Foundation has a unique role in the ecosystem because it guides companies on their access approaches and incentivises them to do better. There is no other mechanism in the ecosystem that fulfils this important function. As one stakeholder put it – “if the Foundation did not exist, there would be a strong rationale to create it”.

Figure ES1. Relevance of the Foundation in the global health ecosystem



At the same time, the Foundation is seen as a respected, evidence-driven, and impartial broker on access issues that works with industry and a range of other key organisations to improve access. Key informants also argued that the Foundation has undergone an important programmatic expansion. It has established multiple new workstreams that are relevant and in line with its mission and approach, including its work on generic and biosimilar manufacturers and on diabetes care.

Influence

The Foundation has a strong influence on corporate approaches to access. There is widespread agreement that the Foundation has driven a sense of urgency among companies and catalysed improved access across the sector. First released in 2008, the Index remains a key point of reference for corporate access approaches. Public and philanthropic stakeholders, institutional investors, and company representatives recognise the Foundation's instructive role in driving corporate change. By generating and sharing evidence, the Foundation empowers these actors to drive change. The Foundation's work with investors is also seen as influential and unique in the global ecosystem. Overall, there is also no other independent organisation in the global ecosystem that works on access for such a wide range of products.

Index: The Index serves a unique function in the global ecosystem. Many key informants agreed that the Index sets a standard of best practice and guides the industry on access approaches. Most industry representatives view the Index as a key point of reference and use it to drive corporate change on access issues. Leadership across companies is very aware of the Index. The Foundation's leadership is in contact with leaders and decision-makers of all Index companies to discuss opportunities to improve access to medicine in LMICs.

AMR: The AMR Benchmark has contributed to sustained company commitment in the antibiotics space. In addition, public and philanthropic stakeholders, institutional investors and companies strongly value the Foundation's analysis and advice on AMR. Industry representatives reported that the Foundation helped them to advocate internally for sustaining access to antibiotics and other products (e.g., tuberculosis treatment). Global health stakeholders argued that the benchmark exerts background pressure on industry. Public and philanthropic stakeholders consistently rated the Foundation's research and advice on AMR as high quality. Interviewed stakeholders, for example, emphasised that three recent thematic studies on [appropriate access](#) to antibiotics (2022), [responsible manufacturing](#) (2023), and [research and development](#) (2024) were timely, foundational, and influential. Stakeholders strongly leverage the evidence and advice of the Foundation to inform their engagement with companies and to prepare for intergovernmental negotiations. Investors also reported that they rely on the Foundation's research to engage with industry on AMR-related topics, priorities, such as innovation, and clean manufacturing. Together with the FAIRR initiative and the UK Government's Department of Health and Social Care, the Foundation also launched the Investor Action on Antimicrobial Resistance initiative to galvanise investor efforts to address global AMR.

Diabetes: The Foundation has significantly contributed to a stronger global ecosystem for diabetes. In December 2021, the Foundation launched its cross-sector programme on diabetes care. It conducted analyses on access to insulin and organised three Amsterdam Sessions between 2022 and 2024. Key informants highlighted that the 2022 meeting brought together all relevant stakeholders, including glucose monitoring device companies, for the first time, and that the meetings successfully shifted the approach to access "from individual responsibility to collective

action.” The Foundation has played a critical role in building collaborative relationships, which was also valued by LMIC representatives, who reported that new partnerships on access to insulin with pharmaceutical companies emerged from these meetings. Insulin producers have begun to adapt their approaches, including changes to the types of insulin provided to LMICs.

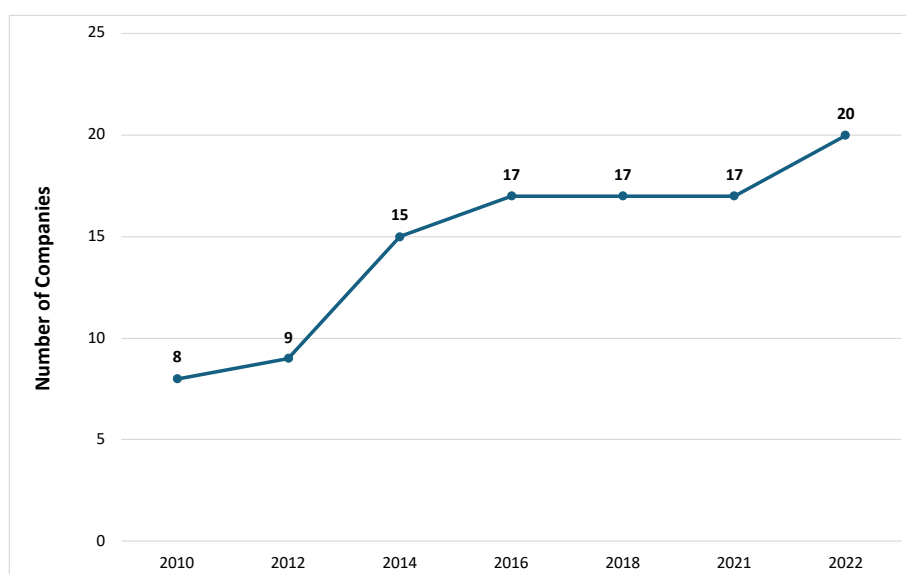
Medical gas: During the COVID-19 pandemic, the Foundation helped to fill a critical gap in the global health ecosystem by bringing gas companies and other actors around the table for the first time. The Foundation’s engagement significantly contributed to access to medical oxygen in LMICs. It laid the groundwork for two Memoranda of Understanding to be signed between companies and other global health initiatives that have led to concrete progress in LMICs.

Generic and biosimilar manufacturers: The Foundation’s work on generic manufacturers is widely valued across key informants. In the short time since the launch of this workstream (the analytical framework and report were released in 2023), concrete progress has already been made. For instance, the Foundation provided advice and data to support the creation of product priority lists for the Access to Oncology Medicines Coalition and the Pharmaceutical Manufacturing Plan for Africa (PMPA). The Foundation’s contribution to the PMPA underscores its role as a key player in enhancing local manufacturing and improving access to essential medicines in African countries.

Outcomes

Our findings show that the Foundation has contributed to the access approaches of multiple companies. During the interviews, several companies provided examples of how the Foundation contributed to action-oriented initiatives to improve access. Examples include access plans, the development of new organisational units, and voluntary licensing. In addition, the Foundation’s own data indicates that the Index has supported access. Longitudinal changes in the industry are well documented by the Foundation’s own reports and supplemented by company and investor reports. For example, the number of Index companies with measurable goals, objectives, and targets for improving access increased from 8 in 2010 to 20 in 2022.

Figure ES2. Number of Index companies with measurable goals and targets for improving access



Impact

Triangulation of evidence from the document analysis, key informant interviews, and quantitative modelling indicates that the Foundation has made significant access contributions. Most key informants believe that the Foundation has significantly contributed to improving access to medicines in LMICs. Across key informants, 90% agreed that the Foundation has made a significant contribution. Our quantitative analysis of the public health benefits (see section on value for money below) confirms that the Foundation has substantially contributed to access in LMICs.

Value for money

Our results show that investment in the Foundation generates substantial public health and economic benefits. Our findings provide a strong rationale for donors to fund the work of the Foundation. There is no doubt in our minds that the Foundation plays a unique role in the global health ecosystem and makes a significant contribution to improving access. It is a prime example of an organisation that contributes to the creation of global public goods, be it through knowledge generation and dissemination, convening, guidance on access, or advising on product development partnerships and pooled procurement mechanisms. Donors should enable the Foundation to make its work even more impactful. We conducted a value for money assessment along four dimensions:

Economy: This dimension assesses whether programmes receive inputs at the best possible value. We found that the quality of research produced by the Foundation is high, while its expenditure is low compared to similar organisations working in global health.

Efficiency: This dimension assesses how changes to the inputs of a programme affect its outputs. Since 2021, the Foundation has broadened its base of long-term and core funders, enabling it to expand its work into new sectors in line with its [‘Strategic Direction 2022-2026’](#). The Foundation has also significantly increased the number of events and publications since 2021.

Effectiveness: We modelled the health and economic benefits of expanded access to five product types by six companies, which were selected based on the representation of the Foundation’s product scope and the availability of data from a new Foundation [report](#) on patients reached. The health benefits of improved access to these five product types were found to be substantial: If the companies meet their access targets for the five product types in LMICs, a total of 808 million patients will be reached, which could avert 2.6 million deaths by 2030. Our model shows that investing in the Foundation pays off – every US\$1 dollar invested would return US\$57. Our model underestimates the returns as it only includes five product types.

Equity: The Foundation’s mission is to stimulate healthcare companies to increase access to medicines for billions of individuals living in LMICs. Its research covers 113 LMICs, and the scope of the 2024 Index includes 81 diseases, conditions and pathogens with the highest burden in LMICs. It also makes a concerted effort to address access issues impacting vulnerable populations, including women and girls, in the methodology consultations, Index key findings, and special reports.