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Evaluation of the Access to Medicine Foundation



Final Report – Executive Summary



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Thyra de Jongh, Matthias Ploeg, Anneloes de Ruiten, Liana Petrosova, Lonneke Schrijver, Ivette Oomens

Executive summary

The Access to Medicine Foundation (hereafter referred to as the Foundation) was established in 2003 to improve equitable access to medicines, vaccines and diagnostics (hereafter collectively referred to as access to medicine, ATM). Since then, it has developed from a small initiative into a solid and efficient organisation with a track record of rigorous research and effective change-making.

The independent evaluation

In 2020, the Foundation commissioned Technopolis Group to conduct an independent evaluation of the progress of the Foundation in advancing access to medicine in low- and middle-income countries (LMICs). This evaluation focused on assessing the influence of the Foundation on the pharmaceutical sector, progress and impacts on the ground achieved by pharmaceutical companies' actions, as well as exploring the mechanisms through which the Foundation affects companies to achieve positive change. This evaluation also assessed the value for money (VfM) of the Foundation to current and prospective funders.

The evaluation has drawn evidence from desk research, stakeholder interviews and a benchmark analysis. The desk review consisted of analysis of internal documentation of the Foundation and reports to its funders, as well as academic and grey literature to support the development of impact cases studies. Semi-structured interviews were conducted with a large number of representatives from pharmaceutical companies both within and outside of the scope of Foundation's work, funders, signatory investors, and other important actors in the ATM space such as global donors and non-governmental organisations, ATM experts and representatives from LMICs. The VfM analysis adopted the United Kingdom's Foreign, Commonwealth and Development Office (FCDO) "4E framework" and thus explored the economy, efficiency, effectiveness and equity of the Foundation as compared to similar organisations.

Confirming the validity of the Foundation's Theory of Change and the effectiveness of its mechanisms of influence

The evaluation was able to confirm the validity of the Foundation's Theory of Change and the effectiveness of the mechanisms of influence used by the Foundation to drive positive change in the pharmaceutical industry on access to medicine. The Foundation uses a number of 'tools' to encourage and inspire change, including the development and publication of company rankings, provision of tailored advice to industry stakeholders, engagement with the investor community and contribution to global ATM advocacy efforts.

The Access to Medicine Index (hereafter the Index) remains the Foundation's flagship product. The framework for action that the Foundation has developed and continues to refine that underpins the Index has become a standard for both the industry and other stakeholders working on ATM and antimicrobial resistance (AMR) issues. The appreciation of the Foundation's Index and framework for action is also seen among companies that are currently outside of the scope of the Foundation's programmes.

By providing tangible indicators for access performance, the Foundation supports companies and other ATM stakeholders in learning a shared "language of access", which helps enhance the collaboration between these actors. The Foundation has successfully maintained and even expanded its role as a consensus-builder around issues of ATM and AMR.

Whilst the Foundation has been effective in triggering the competitive nature of the pharmaceutical industry through comparing and benchmarking company performances, it also offers recognition for companies on specific aspects of the framework for action regardless of their overall performance in the Index. The Foundation does so by spotlighting industry best practices in various areas of ATM, through the Index and AMR Benchmark (AMRB) as well as through thematic studies. Companies report that the public recognition of efforts helps them build relationships with partners to further advance their ATM programmes. Stakeholders also highlight the strong reputation of the Foundation among industry and other global ATM players.

The Foundation has managed to encourage companies to structure their internal reflections on access matters and to improve their performance on areas identified by the Foundation as opportunities for improvement. In doing so the Foundation relies on its relationships with companies' internal change-drivers, i.e., employees that are in a position to influence company commitment to ATM and translate this into action. Several company representatives consider the support of the Foundation to have been instrumental in their internal access advocacy and believe that in this way the Foundation truly drives change within companies.

By applying a comprehensive assessment framework, the Foundation has also contributed to greater transparency in the pharmaceutical industry. Some company representatives indicate that the data collected by the Foundation is more thorough than what they make available via their own communication channels. The standardised analysis of this data allows for direct comparison between companies and highlights best practices, as well as areas where companies fall short. The data companies provide to the Foundation represent one of the rare examples of (relatively) transparent and comprehensive ATM reporting by the industry. The measure of transparency that the Foundation brings is valued by many in the global ATM field, some of whom have indicated that their own decision to engage with a company is informed by how well it performs in the Foundation's Index or AMRB.

Over the evaluation period, the Foundation has strongly developed its engagement with the investor community. Since the start of their investor engagement efforts, the Foundation has drastically increased the number of investors it works with and intensified the ways by which it engages with investors. Interviewed investors value the outputs of the Foundation and the individual tailored support the Foundation provides them. This supports their own efforts to influence how companies approach ATM.

From influence to impact: four case studies

In line with the findings of the Foundation's 10-year progress report and industry trends outlined in the 2021 Access to Medicine Index, the evaluation confirms that, apart from changes in the attitudes of companies regarding ATM and an increase in internal ATM reflection processes, there has also been a major shift in the ways in which company efforts are translated into practice. Many stakeholders believe that the Foundation has played an important role in facilitating such changes. Whilst it is not possible to draw any direct causal connections between the work of the Foundation and increased access to medicine, as there are many other actors and actions in between these elements – not least the companies themselves –, this evaluation has sought to show how the Foundation contributes to access by use of four illustrative case studies. These case studies have focused respectively on voluntary licensing, access planning during R&D, company transformation to mainstream access into sustainable business models and global policy shaping.

The Foundation's work on encouraging voluntary licensing, particularly in connection to the Medicines Patent Pool, is recognised by many as a substantial contribution to increased access to medicine in LMICs with associated cost savings to health systems in these countries. A conservative estimate of the Foundation's impact in this space points towards tens of

thousands of additional people having access to treatment across the world and millions of dollars in savings. The impact of the Foundation on getting companies to begin access planning during R&D rather than at the end of the product development process is as yet less visible, since most companies are still to implement this at scale but specific product-related examples included in this evaluation show the potential of these actions. If companies continue to step up their efforts in this area, under the watchful eye and guidance of the Foundation, this may increase access for many thousands of people in the short-term and many more in the longer-term.

Potentially the most impactful change in the pharmaceutical industry lies in the transformation of approaching access as part of corporate social responsibility to mainstreaming access for LMICs into a company's business model based on different considerations of volume and price and a need for concurrent investments in health systems. Such impacts could not be quantified in this evaluation, as they are not clearly distinguishable from those resulting from more traditional business approaches. The Foundation's contribution to the transformation is also difficult to delineate as it takes place against a notable shift in how companies approach emerging markets in general. Nonetheless, it is fair to assume that by signalling opportunities and providing companies with advice on how to approach particular issues, the Foundation is facilitating this transformation, thus contributing to impact. Even when assuming a minor contribution by the Foundation, the overall impact will be very significant given the expected reach of this development.

The impact of the work of the Foundation in shaping global policy around ATM issues is likewise very challenging to estimate. In some of the areas where the Foundation has done so, there is much promise but as of yet little tangible impact. In other areas, there are very significant impacts from the work global health actors are doing collectively but the role of the Foundation is comparatively small to that of other, more influential players. However, considering its modest scale as an organisation, it is noteworthy how much other organisations value the work of the Foundation as a thought-leader and access champion.

Conclusions about impact, value for money and return on investment for current and prospective donors

Although methodological challenges and data limitations do not allow extrapolating from or aggregating across the illustrative impact cases, jointly they show that the work of the Foundation has likely already contributed to improve access to medicine for millions of people and also produced millions in cost savings for LMICs. This impact is set to grow further as companies continue to improve their performance on issues of access and AMR.

The VfM analysis shows that the Foundation performs well across all assessment areas. The expenditures of the Foundation, including its staff remunerations, cost of principal activities as well as overhead costs, are in line with that of the organisations against which the Foundation was benchmarked. The effectiveness of the Foundation is clearly visible in the analysis of its impacts. The Foundation also applies strategies to ensure equitable distribution of results of their efforts.

This evaluation concludes that, since the last assessment, the Foundation has continued to strengthen its position as a driver of positive change in ATM efforts within the pharmaceutical industry. Compared to the overall budget of the Foundation, which stands at around €3 million, its impacts offer a many-fold return on investment. The size of the organisation is particularly noteworthy in comparison to the significant influence on the companies it targets and the associated positive impacts on the ground. Effectively, the Foundation's staff embody the proverb of ants moving mountains.