

5th Meeting of the Montreux Collaborative

Fiscal space, public financial management and health financing in a time of COVID-19

Date: 15–19 November 2021

Meeting background:

Since 2014 WHO has convened the Montreux Collaborative bi-annual meeting bringing together experts and partners to discuss the critical relationship between fiscal space, public financial management (PFM) and health financing towards advancing the universal health coverage (UHC) agenda. The aim of the Montreux Collaborative is to raise the profile of public finance towards achieving UHC, to generate and exchange ideas and lessons to support the implementation of tailored reforms in health, and to consolidate and broaden the network of experts and partners interested in public finance issues for health.

This year, 2021, not only marks the 5th meeting of the Collaborative, but it is the first meeting held in the context of COVID-19. COVID-19 is both a health and an economic crisis that has implications for health financing and progress towards UHC. The crisis has exposed systemic PFM bottlenecks in health spending. It has forced countries to adapt their PFM systems to provide greater financial flexibility and to tailor accountability systems to respond to this unprecedented crisis. In response to the rapidly developing context, this meeting will explore policy options to help countries rebuild and strengthen health financing and PFM systems to make them more responsive to future shocks and able to sustain efforts towards UHC.

The meeting will be held virtually from 16 to 19 November 2021 and will be open to the public. On 15 November 2021, a series of pre-meeting events will take place to mark the 5th meeting of the Montreux Collaborative. It will include a keynote speech and a book launch for *How to make budgets work for health: a WHO guide for designing, managing and monitoring programme budgets in the health sector*.

The Montreux Collaborative meeting is organized by the WHO Department of Health Systems Governance and Financing in collaboration with various development partners, foundations and civil society organizations active in the PFM and health agenda, including the World Bank Group, the International Monetary Fund (IMF), the Organisation for Economic Co-operation and Development (OECD), the United Nations Children's Fund (UNICEF), Gavi, The Vaccine Alliance, The Global Fund to Fight AIDS, Tuberculosis and Malaria, International Budget Partnership, Results for Development (R4D), and ThinkWell. The meeting will be held in English and French with simultaneous translation provided.

Monday, 15 November 2021: Pre-meeting events

13:00 - 13:30 CET Introduction session

This session will give an overview of the meeting's five-day agenda and provide IT and logistic details to participants.

- Background and overview of the meeting's agenda: [Joe Kutzin](#) (WHO)
- IT and logistics

13:30 - 14:30 CET: Keynote speech to mark the 5th Meeting of the Montreux Collaborative

Chair and moderator: [Joe Kutzin](#) (WHO)

To mark the fifth meeting of the Collaborative, this session will feature Cheryl Cashin, a key initiator and renowned member of the Montreux Collaborative meetings.

- Reflecting on the past and looking to the future: shifts in the global PFM and health financing environment: [Cheryl Cashin](#) (Managing Director, Results for Development)
- Questions and answers

14:30 – 14:45 CET: Comfort break

14:45 - 16:00 CET: Book launch

How to make budgets work for health: a WHO guide to designing, managing and monitoring programme budgets in the health sector

Chair and moderator: [Matt Jowett](#) (WHO)

Programme budgets can strengthen alignment with health sector policies and strategies, provide more flexibility in fund management, and facilitate stronger transparency and accountability towards health outputs. However, this transformation is not automatic. This session will introduce the new WHO guide on programme-based budgeting and provide lessons and recommendations on how to make budgetary reforms work better for health. It will also feature first-hand perspectives from reform practitioners from Uganda and the Philippines involved in the introduction of programme budgets in the health sector.

- Guidance book presentation by the editors: [Hélène Barroy](#) (WHO), [Mark Blecher](#) (National Treasury, South Africa), [Jason Lakin](#) (formerly, International Budget Partnership)
- Video recorded messages from book contributors: [Chris James](#) (OECD), [Moritz Piatti](#) (World Bank), [Elina Dale](#) (Norwegian Institute of Public Health), [Maarten de Jong](#) (PFM expert/Public Sector Auditor), [Santiago Cornejo](#) (GAVI)
- Perspectives from implementation: [Richard Kabagambe](#) (Ministry of Health Uganda), [Omi Castañar](#) (formerly, Department of Budget and Management, The Philippines)
- Questions and answers

Q&A support: [Linnea Mills](#) (WHO consultant)

Tuesday, 16 November 2021: Main meeting – Day 1

13:00 - 14:00 Macro-fiscal crisis and COVID-19: What are the implications for health financing and UHC?

Chair and moderator: [Susan Sparkes \(WHO\)](#)

The session will reflect on the combined health and macro-fiscal impacts of COVID-19 for health financing and progress towards UHC. Beyond the immediate impact, the broader macro-fiscal outlook will be presented to provide the necessary context in which health financing policy will be situated. The panel discussion will consider health financing policy adjustments made during the pandemic and their implications for future policy priorities. Specific attention will also be paid to emerging health financing priorities in the short- and medium-term given macro-fiscal constraints and population health needs. These policy options will focus on those that can effectively safeguard UHC progress particularly for the poor and most vulnerable amidst shocks and macro-fiscal constraints.

- Macro-fiscal outlook: [Raphael Espinoza \(IMF\)](#)
- Discussants to reflect on macro-fiscal implications for health financing: [Dileep De Silva](#) (Ministry of Health, Sri Lanka), [Mawuli Gaddah](#) (Ministry of Finance, Ghana), [Tamás Evetovits \(WHO EURO\)](#), [Ajay Tandon](#) (World Bank)

Q&A support: [Peter Cowley \(WHO\)](#)

14:00 - 14:15 CET: Comfort break

14:15 - 15:30 CET: What can COVID-19 teach us about PFM?

Chair and moderator: [Srinivas Gurazada \(PEFA\)](#)

The COVID-19 crisis has been a stress test for all PFM systems across the world. It has forced countries to adapt PFM to provide greater financial flexibility and tailor accountability methods in the midst of the crisis. The session will feature global PFM leaders and country experts from South Africa and the Philippines to learn about the key PFM barriers and enablers for driving an effective budgetary response to health emergencies. The session will also share perspectives on possible ways to rebuild and transform PFM systems to make them more responsive and tailored to health spending needs.

- Global PFM lessons from the COVID-19 crisis: [Richard Allen](#) (public finance consultant)
- Country PFM bottlenecks and adjustments for COVID-19: [Mario Villaverde](#) (Department of Health, The Philippines), [Ogali Gaarekwe](#) (National Treasury, South Africa)
- Discussion: how to integrate and sustain lessons from COVID-19 for future PFM: [Sarbani Chakraborty](#) (health financing consultant), [Teresa Curristine](#) (IMF)
- Questions and answers

Q&A support: [Hélène Barroy \(WHO\)](#)

15:30 - 15:45 CET: Comfort break

15:45 - 16:30 CET: How to assess PFM bottlenecks and monitor reform progress in health: a rapid update on PFM and health tools

Chair and moderator: [Toomas Palu](#) (World Bank & UHC2030)

In recent years, several development partners have developed technical tools and guidelines to assess PFM bottlenecks in health. Team leads in charge of the development of these tools from PEFA, UNICEF, WHO, and the World Bank will join this session to reflect on the different assessment approaches, how they complement each other, and to identify remaining gaps to further support policy monitoring.

- Panel: [Manoj Jain](#) (World Bank), [Julia Dhimitri](#) (PEFA), [Matt Jowett](#) and [Hélène Barroy](#) (WHO), [Jennifer Asman](#) (UNICEF) and [Sierd Hadley](#) (for UNICEF/ODI tool)
- Country uptake: [Adanna Chukwuma](#) (World Bank), [Faraz Khalid](#) (WHO EMRO)

Wednesday, 17 November 2021: Main meeting – Day 2

13:00 - 14:30 CET: Direct facility financing: what are the opportunities and challenges of PFM systems?

Chair and moderator: [Joe Kutzin](#) (WHO)

In many low- and middle-income countries (LMICs), public funds do not reach the frontlines due to systemic bottlenecks and rigidities in PFM frameworks. Recently, several initiatives have aimed to empower service providers to manage public funds directly, giving them the ability to access, manage and report their own accounts. This session will provide an overview on those approaches summarizing existing literature and evidence. The session will also examine the experience of direct facility financing in Tanzania and offer perspectives on scaling up similar reforms in other LMICs, particularly against the backdrop of widespread PFM and decentralization reforms.

- Concepts and rationale of direct facility financing: [Sophie Witter](#) (Queen Margaret University Edinburgh, UK)
- Tanzania: key lessons from aligning direct facility financing and the PFM system: [Sheila O'Dougherty](#) and [Gemini Mtei](#) (Public sector systems strengthening project, Abt Associates/USAID, Tanzania)
- Discussion: Opportunities and constraints for scaling up reforms: [Nirmala Ravishankar](#) (ThinkWell), [Ayodeji Oluwale Odutolu](#) (Global Financing Facility), [Michael Borowitz](#) (The Global Fund)
- Questions and answers

Q&A support: [Federica Margini](#) (UNICEF)

14:30 - 14:45 CET: Comfort break

14:45 - 16:00 CET: Health budget execution performance: how to get on the same page?

Chair and moderator: Cheryl Cashin (Results for Development)

Budget under-execution is pervasive in health. This problem is often attributed to poor absorption capacities of health ministries; however, causes are often more complex. Building on work developed by WHO and the World Bank with support from the IMF, this session will provide a common framework for assessing health budget execution issues, mapping their root causes and identifying policy solutions in a coordinated manner between health and finance. The session will also provide reflections from country applications in Ukraine and Kyrgyzstan and offer some perspectives on how to bring finance and health leaders together to put health budget execution on the agenda and coordinate effective policy change.

- Assessing health budget execution performance: a country-level framework: [Hélène Barroy](#) (WHO), [Moritz Piatti](#) (World Bank)
- Putting the framework into practice: evidence from Kyrgyzstan and Ukraine: [Loraine Hawkins](#) (health finance consultant)
- Acting together: country and global reflections from [Sabeen Afzal](#) (Ministry of National Health Service, Regulation and Coordination, Pakistan), [Fazeer Rahim](#) (IMF), and [Sally Torbert](#) (IBP)
- Questions and answers
- Q&A support: [Amna Silim](#) (WHO consultant)

Thursday, 18 November 2021: Main meeting – Day 3

13:00 - 14:00 CET: Donor funding: how to facilitate alignment with domestic PFM systems?

Chair and moderator: [Magnus Lindelow](#) (World Bank)

Despite many commitments from the development partner community to make greater use of country systems over the last two decades, there remains a lack of clarity on the definition of country systems, how partners can better align to PFM systems, and what can be done to accelerate further alignment. This session will present insights on how development partners can enhance their alignment with domestic PFM processes and how to establish baselines and track progress for mutual accountability, the session will also highlight good practices from Rwanda. The session will reflect on aspects of PFM systems that may require further strengthening before development assistance can be channeled through country systems.

- Alignment of donor financial management systems and domestic PFM systems: rethinking opportunities and bottlenecks: [Moritz Piatti](#) (World Bank)
- Good practices from Rwanda: [Zachee Iyakaremye](#) (Ministry of Health Rwanda)
- Reflections from partners: [Amir Aman Hagos](#) (Chair of working group on donor alignment, GFF), [Eric Boa](#) (The Global Fund), [Agnès Soucat](#) (Agence Française de Développement)
- Questions and answers

Q&A support: [Sarah Alkenbrack](#) (World Bank)

14:00 - 14:15 CET: Comfort break

14:15 - 15:15 CET: Digital technologies: what are the opportunities and risks for better PFM in health?

Chair and moderator: [Sanjeev Gupta](#) (CGD)

In the past decade, digital technologies have made significant inroads into management of public finances. Their use received further impetus in the past 18 months as governments increased their spending, including health spending, to shield populations from COVID-19. The session will highlight how enhancements in digital technologies have contributed to strengthening budget development, execution, transparency and accountability in LMICs for better service delivery. Following an introductory overview by an IMF representative, country panelists from India and Tanzania will discuss the expanding use of digital technologies as part of PFM practices in the health sector. Global experts will provide reflections on possible ways to scale-up digital use for better PFM in health, especially in the context of COVID-19.

- How digitalization can improve PFM operations and service delivery: [Manal Fouad](#) (IMF)
- Country perspectives with a focus on PFM practices in health: [Anupam Raj](#) (Ministry of Finance India), [Erick Kitali](#) (President's Office - Regional Administration and Local Government, Tanzania)
- Global reflections: [Neil Cole](#) (CABRI), [Inke Mathauer](#) (WHO)
- Questions and answers

Q&A support: [Fahdi Dkhimi](#) (WHO)

Friday, 19 November 2021: Main meeting – Day 4

13:00 - 14:30 CET: Concluding session: the Montreux Collaborative agenda: next steps and ways forward in a world living with COVID-19.

This session will reflect on key messages that have emerged throughout the meeting and offer a platform for partners and country representatives to discuss next steps and ways forward for the PFM and health financing reform agenda.

- Key messages from the event: [Joe Kutzin](#) (WHO)
- Country discussants: [Farhad Farewar](#), [Gemini Mtei](#), [Midori de Habich](#), [Pura Angela McDonald](#)
- Way forward: [Hélène Barroy](#) (WHO)
- Concluding remarks: [Cheryl Cashin](#) (Results for Development).