

RVMC

Regionalized Vaccine Manufacturing Collaborative

Optimising Regionalised Vaccine Manufacturing

STRATEGY 2028–2032

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STRATEGY 2028–2032

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Executive Summary

Regionalised vaccine manufacturing (RVM) is widely accepted as an important part of the global manufacturing mix needed to secure equity in access to vaccines for both routine use and during outbreaks. Today, however, RVM remains at an early stage. Regional manufacturers supply just 1% of vaccine demand in Africa, 25% in LAC, and 29% in ASEAN[i].

Structural barriers persist: fragmented demand, regulatory processes and financing poorly matched to manufacturers' needs. Although the regions are making progress against these barriers, wider changes in global health over the past two years also need to be addressed: global health financing is contracting and geopolitical realignment is creating both opportunities and challenges. Ongoing discussions about the future of global health architecture are highlighting the importance of regionalisation.

RVMC was founded with a clear vision: a world with vaccine equity and health security in all regions. We have become the credible, independent voice for RVM, successfully developing a shared Global Vision for RVM, building the evidence base, partnerships and awareness needed to sustain stakeholder action.

Our next strategy (2028-2032) builds on this foundation and focuses on creating RVM ecosystems that are economically viable, operationally resilient and institutionally supported for the long term.

Our updated mission is therefore to work with partners to optimise Regionalised Vaccine Manufacturing (RVM): establishing the political commitment, market structures, regulatory frameworks, and financing conditions that make sustainable RVM a reality.

RVMC is uniquely positioned to hold a system-wide view within and across regions. This strategy calls on our support to be catalytic and remain directed at the regions and countries left behind during the last pandemic. We will increasingly respond to the broadening set of drivers for regionalised manufacturing, which include industrial development and local innovation, in addition to vaccine equity, and health security and sovereignty.

The optimising mission requires RVMC to progress from a think tank into an action-oriented initiative that provides focused implementation support. Through four strategic initiatives, we will move from primarily enabling and facilitating others' approaches to working alongside partners to shape decisions and actions – from project teams through to the leadership of governments, regional bodies and global health agencies.

[i] RVMC, First Status Report, London, RVMC, 2025, www.rvmc.net

Executive Summary

Our four strategic initiatives are designed as an integrated approach rather than four separate programmes - each reinforcing the others and adding value for our partners, and will be supplemented by other activities where they strongly support the mission without significant resource demands.



The **Insights initiative** will provide the evidence base for RVMC to generate an independent picture of where RVM stands, and the insights that help partners see where action is most needed in their own context and make optimal use of limited resources.

The **Regional Pathways initiative** supports each region's lead entity translate their ambitions and commitments on RVM into clear, visible pathways that partners can use to implement projects and mobilise the political backing needed for implementation.

The **Collaborative Support initiative** will give countries, companies, regional institutions and funders access to the strategic, tactical and technical advice and support they need to optimise regional manufacturing projects. Working with partners, RVMC will provide structured, decision-relevant advice and connect projects to the technical, financing and regulatory expertise they need – helping them clarify trade-offs and reduce risk.

And the **Inter-regional Cooperation initiative** will connect regions and countries in the Global South to one another and to other regions and global partners, providing a platform for practical collaboration, for turning common challenges into market opportunities, and for a stronger collective voice in global discussions.

All four initiatives are guided by RVMC's 2040 Vision, which sets our immediate cross-cutting priorities as political action, predictable demand, regulatory strengthening and harmonisation, and sustainable financing. These priorities shape what each initiative focuses on and how we select projects.

To deliver this strategy, RVMC will invest in building opportunities for strategic partnerships, data infrastructure, and convening and advisory capacity, while continuing to embed staff across Africa, ASEAN and LAC. The baseline budget for this five-year strategy period is $35 million.

RVMC contributes to the wider reform of global health by recognising that the RVM agenda must be locally driven, regionally led and globally connected, and by helping partners align their efforts, connect around shared goals and avoid duplication. We enter the next five years determined to accelerate progress towards sustainable RVM, and confident that this strategy is the right way to achieve it.

01

Strategy and context

Strategy Summary | Context | RVMC Secretariat Today







RVMC Strategy 2028-32

OUR VISION

Vaccine equity and health security in all regions.

OUR MISSION

Work with partners to optimise Regionalised Vaccine Manufacturing (RVM) – establishing the political commitment, market structures, regulatory frameworks, and financing conditions that make sustainable RVM a reality.

OUR GOAL FOR 2032

Regionalised vaccine manufacturing that is financially sustainable, locally driven, regionally coordinated, and globally connected.

BASELINE BUDGET

$35m

STRATEGIC INITIATIVES

Insights

We will become the go-to source of evidence and insights on RVM, bringing the most comprehensive data together in one place and putting targeted analysis in the hands of decision-makers.

Regional Pathways

We will help Africa, ASEAN, and Latin America and the Caribbean turn their ambitions into clear pathways that partners can invest in - working from each region's own priorities.

Collaborative Support

We will give countries and manufacturers access to strategic advice and partner expertise at the early stage of a project that will help them reduce risk, clarify trade-offs, sequence decisions and right-size their ambitions.

Inter-regional Cooperation

We will provide a standing platform for regions to learn from one another, turn shared challenges into practical collaboration and cross-regional market opportunities, and speak with a stronger voice in global discussions.

FOCUS REGIONS



Context

Regionalised vaccine manufacturing (RVM) is now widely accepted as an important part of the global manufacturing mix needed to meet routine and outbreak immunisation needs.

Where RVM stands

Today, however, RVM is still emerging. Our first RVM Ecosystem Status Report[ii] (published in November 2025) confirmed that it remains at an early stage across Africa, LAC and ASEAN. Only three manufacturers from the regions produce five or more vaccines at scale; Africa has none at this level. Regional manufacturers supply just 1% of vaccine demand in Africa, 25% in LAC, and 29% in ASEAN.

Structural barriers persist: fragmented demand that undermines investment confidence; regulatory processes and systems too lengthy and fragmented to support cross-border supply; and financing poorly matched to manufacturers' needs across the manufacturing lifecycle. In addition, regional vulnerability to outbreaks, and especially to a pandemic, persist, making it vital that regional production capacity that serves routine immunisation can also be mobilised for outbreak response.

The regions are making progress against these barriers. LAC features a functioning pooled procurement mechanism capable of supporting RVM. ASEAN has an established, concentrated vaccine manufacturing base, but fragmented procurement and regulatory systems limit its ability to turn this capacity into wider regional supply. Africa has the furthest to go in growing domestic supply, but also has the most ambitious regional frameworks underway, backed by the $1.2 billion African Vaccine Manufacturing Accelerator (AVMA) launched by Gavi[iii], the operationalisation of the African Medicines Agency (AMA), and significant direct investments such as the $108 million financing package for South Africa's Biovac[iv] to build an end-to-end multi-vaccine manufacturing plant.





[ii] RVMC, First Status Report, London, RVMC, 2025, www.rvmc.net
[iii] African Vaccine Manufacturing Accelerator - https://www.gavi.org/our-work/market-shaping/regional-manufacturing-strategy/avma
[iv] IFC, EIB Group and European Commission back Biovac - https://www.ifc.org/en/pressroom/2026/ifc-eib-group-and-european-commission-back-biovac

The Moment

Wider changes in global health over the past two years need to be addressed if RVM is to advance and deliver on its promise of strengthening vaccine equity, regional health security and growing economies:

1. The ongoing contraction of global health financing reflects a durable shift in donor priorities, so RVM financing must increasingly rest on commercial viability, domestic public and private financing and development finance institutions rather than donor transfers.

2. Geopolitical realignment is creating both opportunities and challenges. Governments are pursuing health security and industrial self-sufficiency more assertively, and coalitions of countries interested in RVM are emerging within and across regions. At the same time, some countries are also fragmenting the landscape by favouring bilateral deals over multilateral coordination.

3. The post-COVID reaction that drove political commitments to RVM is softening and is being replaced by other drivers, notably national and regional ambitions for economic growth, high-value jobs, and local innovation.

4. The emergence of rapid response platforms, manufacturing technologies with smaller footprints, and the use of automation and AI is changing the equation for establishing new manufacturing capacities and capabilities in regions. Regional manufacturers may have the opportunity to leapfrog directly to epidemiologically relevant technologies, but must ensure any new platforms can be used to manufacture routine and outbreak vaccines, and contribute to global supply systems where appropriate.

5. Ongoing discussions about the future of global health architecture are highlighting the importance of regionalisation: the Accra Reset[v] has recommended a health architecture organised around sovereign national capability; strong regional functions and genuine global public goods; and the WHO Pandemic Agreement includes provisions on sustainable and geographically diversified local production, with negotiations on its Pathogen Access and Benefit-Sharing annex continuing. The RVM agenda is closely aligned to this, driven by country and regional priorities and focused on building sustainable capacity and expertise within and across regions.

[v]Accra Reset, A Sovereign Future for Health, September 2026 - https://www.accrareset.org/UNGA81/HLP

RVMC Secretariat Today

RVMC was founded in 2022 by CEPI, the World Economic Forum and US National Academy of Medicine. **Our vision is a world with vaccine equity and health security in all regions. Our mission to date has been to establish regional vaccine manufacturing and supply chain networks capable of producing vaccines for routine use in a sustainable manner, with readiness for outbreak manufacturing.**

As an independent Secretariat, we are governed by our Executive Committee – made up of our founding members and senior leaders from Africa CDC, PAHO, the World Bank, and Thai NVI as the lead of ASEAN Vaccine Security and Self-Reliance (AVSSR). Our work is further supported by a Strategic Advisory Board that brings together leaders from governments, multilateral institutions, industry and philanthropy to advance our shared vision.

Since our current strategy (RVMC 2.0) was launched in 2024, the Secretariat has established itself as an independent, collaborative initiative with an initial focus on three regions - Africa, Latin America and the Caribbean (LAC), and Southeast Asia (defined as member states of the Association of Southeast Asian Nations - ASEAN).

Key achievements during this time have included:

APRIL 2025

Publishing a shared Global Vision for RVM

We called out the urgent priorities for RVM - political will, predictable demand and strong and harmonised regional regulatory systems – and through our Framework for RVM[vi] set out the eight critical pillars of a sustainable RVM ecosystem.

APRIL 2025

Co-hosting the first Sustainable Markets Convening

We brought regions and partners together to advance their common interest in supporting the sustainability of regional vaccine manufacturers through predictable demand.

OCTOBER 2025

Assisting country strategies on RVM

We equipped the Government of Ghana with evidence and insights they needed to give domestic vaccine manufacturing the strongest realistic pathway.

NOVEMBER 2025

Strengthening the evidence base

We issued the inaugural RVM Ecosystem Status Report and dashboard, establishing the first comparable baseline of RVM across Africa, LAC and ASEAN.

MAY 2026

Developing market insights

We improved market and capacity insights, by developing target pathways towards sustainable RVM for LAC and ASEAN, and providing support to the World Health Organization's (WHO) Global Vaccine Market Report.

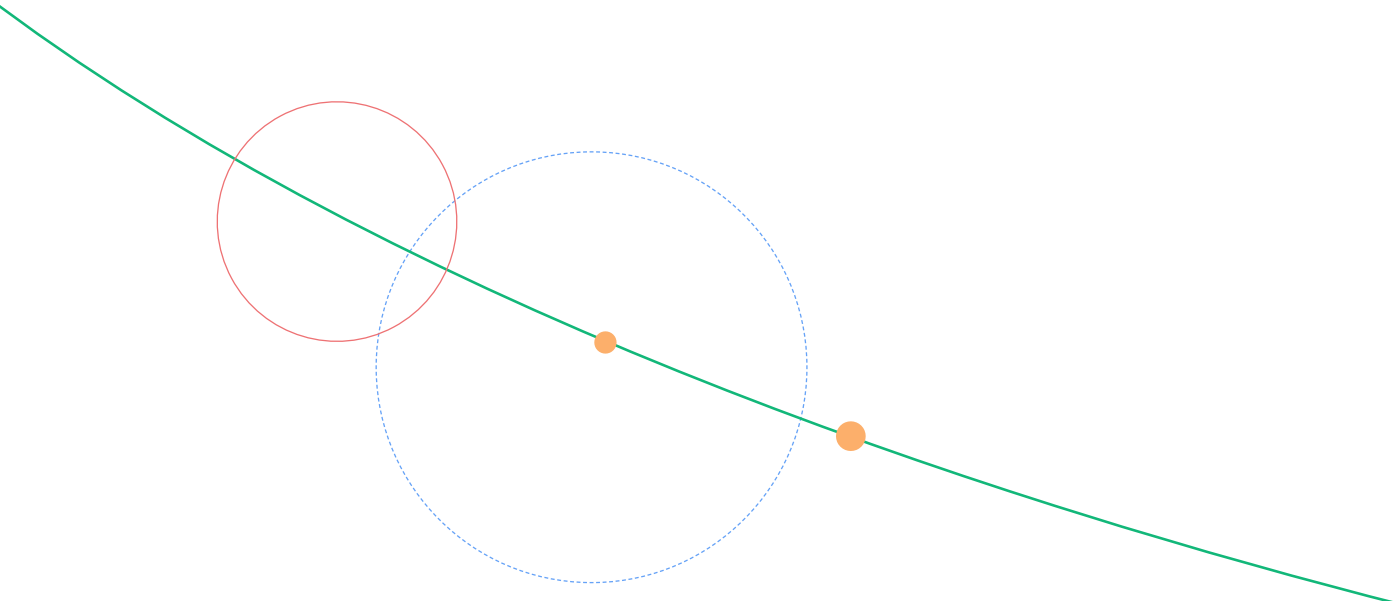
[vi] RVMC, A Framework for Enhancing Vaccine Access Through Regionalized Manufacturing Ecosystems, London, RVMC, 2024 - https://static.rvmc.net/downloads/2024-07/Regionalized_Vaccine_Manufacturing_Collaborative_2024.pdf

RVMC Secretariat Today

From the beginning, RVMC has occupied a unique position as the only organisation solely dedicated to sustainable RVM, independent of any stakeholder, with a system-wide perspective across regions. This allows us to engage with governments, manufacturers, financiers and technical partners as a trusted partner – with a lean, low-cost Secretariat increasingly based in the regions we serve.

RVMC's focus has been to support more RVM, through four mutually reinforcing roles:

1. **Advocating for Change:** we make the case for RVM, setting out the regionalisation agenda and helping others to define and implement their regional approach.
2. **Aligning Partners for Impact:** we facilitate discussions within and between regions and stakeholders, and work to align their projects to common objectives and regional priorities.
3. **Advising on Sustainable Approaches:** we provide independent, trusted advice to stakeholders and expand the current evidence base on global and regional capacity, capabilities, and coverage.
4. **Accounting for Progress:** as the author of the Framework for RVM, we observe and report on progress across the eight pillars - Business Archetypes, Healthy Markets, Financial Models, R&D and Manufacturing, Innovation, Technology Transfer and Workforce Development, Supply Chain and Infrastructure, Product Regulation, and Policy and Governance.



02

Our 2032 Goal and approach

Anticipated Impact | Our Approach | Strategic Initiatives

2032 Goal

Now that RVM has been established as a regional priority, the goal of this 2028-2032 strategy is optimised RVM. Our new mission is therefore to work with partners to optimise Regionalised Vaccine Manufacturing – establishing the political commitment, market structures, regulatory frameworks, and financing conditions that make sustainable RVM a reality.

We define optimised RVM as financially sustainable, locally driven, regionally coordinated, and globally connected.

Anticipated Impact

Where RVM is optimised, we expect to see a number of key features that will advance progress towards our 2040 Vision of a world where vaccine equity and health security are created for countries in all regions:

Balanced Capacity

Diversified and balanced regional manufacturing capacity, aligned with regional health priorities, and with a growing share of regional demand met by regional vaccine manufacturers across routine and outbreak needs.

Predictable Demand

Predictable demand for regionally produced vaccines that creates viable markets and reduces investment risk, enabled by domestic financing and regional procurement mechanisms.

Coordinated Investment

Increased, blended, and better-coordinated investment into regional manufacturing initiatives, aligned with market realities and preparedness requirements.

Technology Sustainability

More strategic technology transfers and platform diversification decisions that reflect market realities and support long-term sustainability.



Regulatory Systems

Faster, more resilient, and better harmonised regulatory systems, including reliance and harmonisation pathways, that shorten approval timelines and enable access to regional markets.

Political Commitment

Stronger political and institutional commitment aligned with regional strategies, reflected in enabling legislation and policy frameworks that institutionalise and sustain support for RVM.

Inter-regional Cooperation

Strong cooperation among regions of the Global South, with regions learning from one another, supported by other regions, pursuing cross-regional market opportunities and speaking with a stronger voice in global discussions.

Strategy: Our Approach

The optimising mission requires RVMC to progress from a think tank into an action-oriented initiative that provides focused implementation support. Establishing the facts about RVM, setting out a 2040 Vision, bringing partners together on common challenges, and making the case for the role of RVM in routine immunisation and outbreak response were the right priorities for RVMC's first phase. To optimise RVM, the Secretariat will now move from enabling and facilitating others' approaches, to working alongside partners.

In practice, this means we will evolve:

From		To
Building the evidence base	→	Also ensuring that evidence is used in the decisions of countries, manufacturers and investors.
Articulating visions	→	Also helping regions make their pathways visible and investable.
System-level advice	→	Also offering structured support for specific country and manufacturing projects.
One-off convenings	→	Also operating a standing platform for inter-regional cooperation.
Engagement at the technical level	→	Also supporting at the levels where the political and financing decisions that determine the future of RVM are made.

Strategy: Our Approach

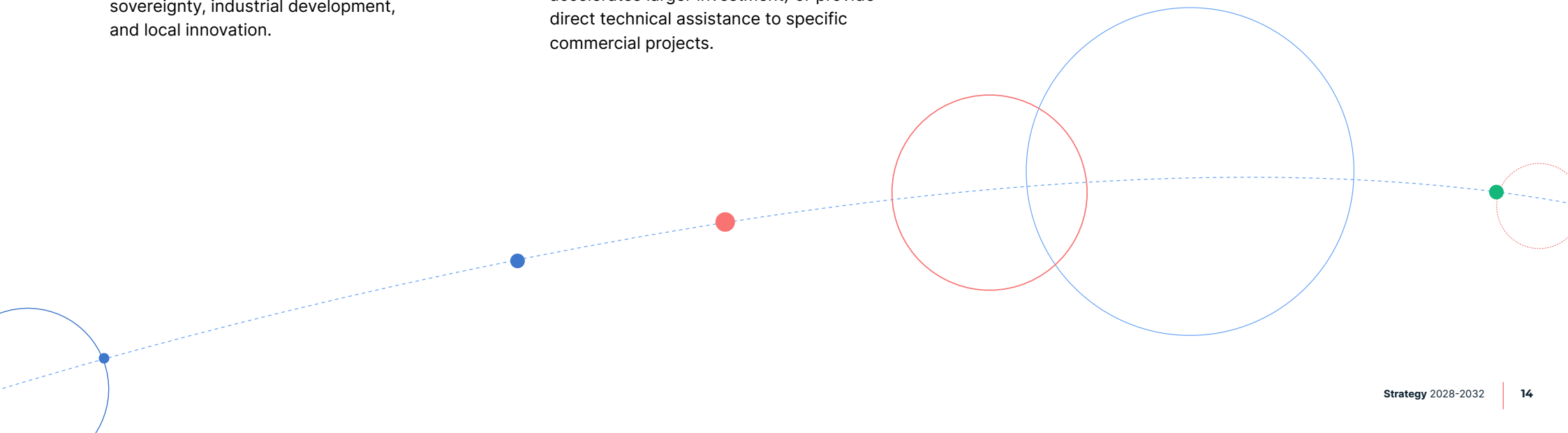
As an independent collaborative that is neither investor, manufacturer, regulator nor procurer, RVMC is uniquely positioned to hold a system-wide view across regions.

RVMC's support will be catalytic and will be directed to the regions and countries left behind during the last pandemic, including but not only limited to Africa, ASEAN and LAC, to vaccine manufacturers within these regions, and funders and technical partners focused on RVM. It will also respond to the broadening set of drivers for regionalised manufacturing, which include vaccine equity, health security (both routine immunisation and outbreak response), health sovereignty, industrial development, and local innovation.

During the period of this strategy, RVMC will:

- **Remain focused on vaccines, while also collaborating with partners in diagnostics and therapeutics on common challenges** and solutions related to establishing sustainable regional manufacturing.
- **Continue to be a collaborative that is open to all stakeholders.** Representation from diverse stakeholder groups is delivered through our Strategic Advisory Board, and we will continue to host events and manage platforms that prioritise open dialogue between partners.
- **Stay small and agile,** focusing our resources on driving stakeholder action that will optimise RVM. We won't fund RVM projects (beyond small, catalytic support that unlocks or accelerates larger investment) or provide direct technical assistance to specific commercial projects.

RVMC's Framework for Enhancing Vaccine Access Through Regionalized Manufacturing Ecosystem provides guidance on all the areas that will eventually be required to sustain RVM ecosystems. It will remain the point of reference for the Secretariat's work across this new strategy, informing the primary areas of focus that need direct action from RVMC, others where we can play a supportive role to organisations who are positioned to lead efforts, and our role in monitoring progress across all the pillars of the framework.



Strategic Initiatives

RVMC's 2028-2032 strategy addresses the optimising goal through four strategic initiatives, supplemented by other activities where they strongly support the mission without significant resource demands.

Our strategic initiatives are designed as an integrated approach rather than four separate programmes - each reinforcing the others and adding value for our partners.

The Insights Initiative provides the evidence base for RVMC to generate an independent picture of where RVM stands, and the insights that help partners see where action is most needed in their own context.

The Regional Pathways Initiative supports each region's lead entity to turn insights into a shared view of the gaps and priorities within the region, and how best to drive partner engagement with them.

The Collaborative Support Initiative delivers practical advice to countries and manufacturers on advancing the projects best suited to optimising RVM.

The Inter-regional Cooperation Initiative connects regions and countries in the Global South to one another and to other regions and global partners, providing a platform for practical collaboration, for turning common challenges into market opportunities, and for a stronger collective voice in global discussions.



Insights

Goal: Ensuring that decisions by countries, manufacturers and investors are grounded in the best evidence.

Optimising RVM requires stakeholders to have reliable, current regional data and insight into what is the status, what is working, what is not and where action is needed.

The current picture of RVM is still incomplete and data quality is highly variable. RVMC has started to address this by developing the Insights Hub, which brings together data, analysis and insights on progress across the vaccine manufacturing ecosystem, and by publishing the first RVM Ecosystem Status Report.

From 2028–2032, the Insights Initiative will become the 'go-to' source of RVM information and targeted analytical support for partner decisions.

To achieve this, RVMC will bring the most comprehensive data sources together in one place, integrating evidence from a wide range of providers. This will improve the quality, consistency and depth of evidence across regions. We will also deliver an ongoing programme of research that generates and actively disseminates insights on regional and global priorities, with tools that help partners explore and visualise them.

From: 2028-2032 we will:

1. **Operate the most comprehensive publicly available evidence base used by all major stakeholders in RVM**
2. **Share tailored analyses directly with the stakeholders who need them**
3. **Generate market intelligence to support RVMC's advisory services**

NOTE ON RVMC'S ROLE AND SCOPE:

We will integrate and interpret data from the organisations best placed to collect it, generating primary data only when it is missing and deemed critical. RVMC's public evidence base and insights will remain openly available. We won't provide direct commercial or transactional data support to individual companies for purposes such as support for tender processes.

Insights

Core Activities

Comprehensive publicly available evidence base

Expanding access to market and supply data, alongside stronger information systems, is crucial. We will achieve this by working in close partnership with organisations already active in this space, such as WHO and its Market Information for Access to Vaccines database, UNICEF, PAHO, Africa CDC and others, to integrate data that fills gaps in the picture of RVM, particularly the regional data needed for regionally tailored insights. RVMC will develop the data infrastructure, technical capabilities, and reporting needed to sustain this role at scale. We will also leverage applicable innovations including AI, to keep the evidence base current, accessible and responsive to emerging needs, with all outputs reviewed and validated by RVMC staff.

Market intelligence to support advisory services

The Insights Initiative will also provide analytical support to the Regional Pathways, Collaborative Support, and Inter-regional Cooperation Initiatives, delivering data that partners can use to make their own decisions.

Tailored analyses

This strategy shifts the emphasis of our Insights work from evidence synthesis towards uptake. Alongside the evidence base and periodic status reports, we will proactively develop and share tailored, decision-relevant analyses that draw on RVMC's system-wide view across regions and align with partner priorities. These will include:

- **Deep dive reports** – focused research on a critical component of sustainable RVM, such as predictable demand, building progressively better data where it is needed most.
- **Tracking initiatives** – showing where progress is and isn't being made over time and across regions, on topics such as technology transfer terms, financing commitments against actual disbursement, and regional RVM capacity. This responds to calls in the global conversation on pandemic preparedness monitoring.
- **Bespoke analytical support** – for example, analysis of vaccine demand, regional manufacturing capabilities and regulatory systems in ASEAN to inform ASEAN-led decisions on priority products and options for pooled procurement, and disease-area landscape analysis feeding into demand forecasting and technology transfer decisions on specific projects.







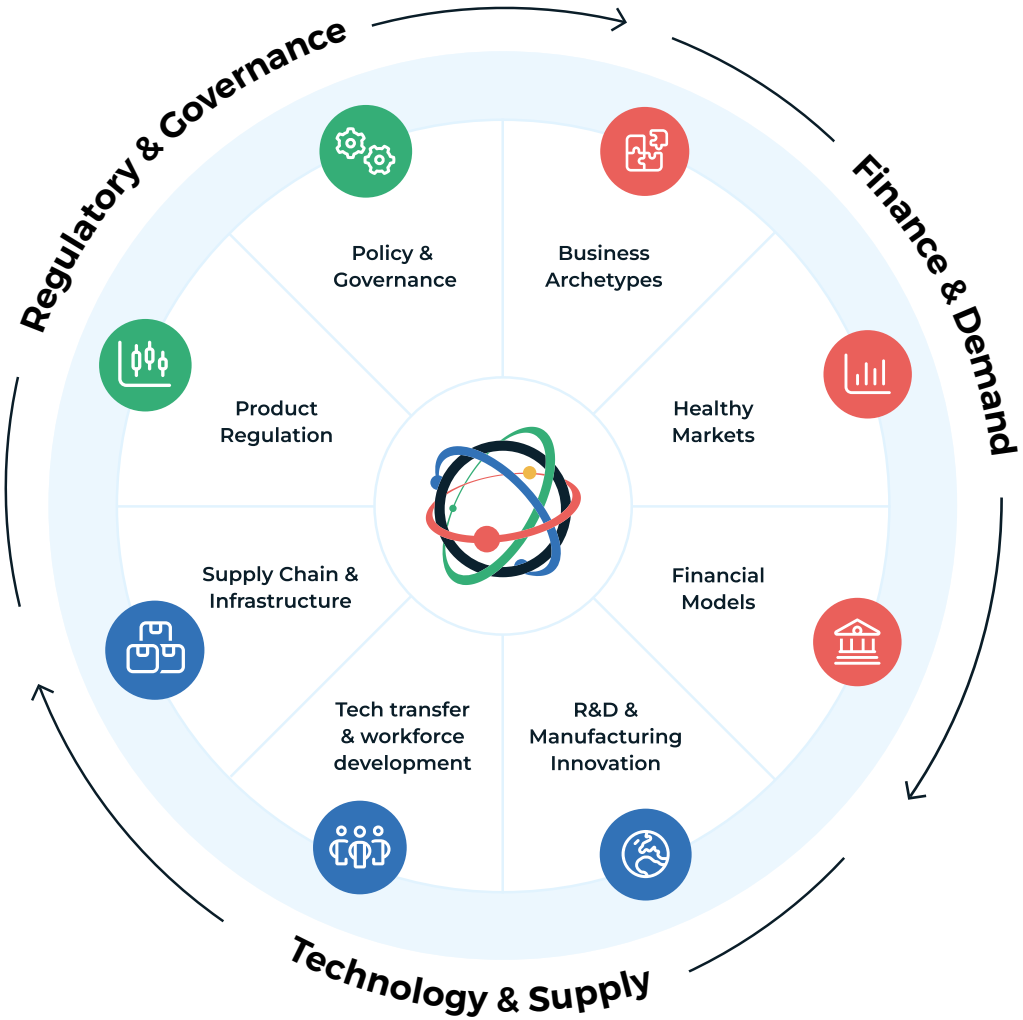
Case Study - The RVM Insights Hub

Progress towards regionalised vaccine manufacturing depends on understanding what's working, what's not, and where to act next. The RVM Insights Hub brings together data, analysis and insights to give a clear view of progress across Africa, ASEAN and LAC, and to support more informed decision-making.

Structured around the three thematic areas and eight pillars of the RVMC Framework, it brings fragmented data into a single accessible view, highlighting progress, gaps, and opportunities for action. Covering finance and demand, regulatory and governance, and technology and supply, it provides partners with a common baseline for tracking developments over time, focusing resources where they are needed most, and steering coordinated action towards sustainable RVM.

The Hub houses the data that makes up RVMC's First RVM Status Report. Over six months, the indicators for the report were shaped through an iterative, consultative process involving regional and global stakeholders and supported by input from subject matter experts. The process prioritised methodological transparency, reproducibility, and comparability across regions to ensure the indicators function as an effective baseline tool for tracking of progress towards regional vaccine self-sufficiency.

Data from the Hub has also been used to support RVMC's advocacy efforts at global events and political forums, as well as in tailored presentations to regional institutions and stakeholders.



Regional Pathways

Goal - Supporting regions to translate ambitions and commitments on RVM into pathways that partners can use to successfully implement RVM projects.

Optimising RVM in a region requires not only vision and commitment, but also pathways that effectively address areas such as establishing needs and demand, clarifying delivery platforms, matching supply and demand financing, and enabling market access.

Each region has a high-level vision for RVM, but to optimise RVM more defined pathways are needed. While regions need pathways adapted to their environment, the basic components of sustainable RVM remain the same. RVMC 2.0[vii] began to address this by publishing our Framework Report, which sets out all the areas required to sustain RVM ecosystems, and our 2040 Vision Document, which identifies political action, predictable demand, and regulatory strengthening and harmonisation as the foundations of effective regional vaccine systems.

To optimise RVM, stakeholders need to engage with existing regional pathways, understand how they are evolving and, where appropriate, contribute to their development. RVMC will work with regional partners to make these pathways visible to other stakeholders, support the development of missing components and mobilise the partners needed for implementation. These efforts will also benefit the manufacturing of other health products that rely on the same pathways, strengthening health systems and health security.

RVMC will work from what each region has already prioritised, supporting regional institutions and countries to refine priorities, sequence action on gaps, lower implementation risk, and bring together the partners best placed to help close them.

This initiative will inform the priorities that the Collaborative Support Initiative acts on at project level, and the opportunities that the Inter-regional Cooperation Initiative builds on across regions.

From: 2028-2032 we will:

1. **Support each region to develop and advance actionable pathways towards sustainable RVM**
2. **Undertake regular reviews with regional lead entities to identify and progress priority RVM actions and projects**
3. **Connect regions to the partners, financing and high-level political support their priorities need**
4. **Track progress on actions across key RVM enablers and compare across regions to identify complementarities and reduce duplication**

NOTE ON RVMC'S ROLE AND SCOPE:

Our approach will be tailored to each region. We will support existing strategies and pathways whenever possible, and aim to help optimise them for better stakeholder engagement.

[vii] RVMC, Strategy 2024-2027, London, RVMC, 2024, www.rvmc.net

Regional Pathways

Core Activities

Understanding each region's strategies and priorities

Working with each region's lead entity and implementation partners and building on a shared understanding of the enabling elements already in place, RVMC will help identify implementation challenges and gaps, and the actions most likely to succeed.

Establishing needs and demand

We will also work with regional lead entities to conduct portfolio reviews that highlight the products and projects most needed and best suited to their own regional pathways. This will help prospective manufacturers to better understand where sustainable opportunities lie in each region.

Clarifying delivery platforms

RVMC will support a dialogue between coalitions of interested countries within a region and the regional lead entities to clarify which countries, manufacturers, platforms, and technologies are best placed to meet priority needs, which in turn will enable more effective and efficient decision-making by investors, vaccine manufacturers and governments. The dialogues will also consider how non-manufacturing countries can benefit from RVM.

Matching supply and demand side financing

We will help regions access the financing a specific pathway needs, including giving funders an independent view of how their support could translate into progress, and helping close gaps between implementing agency investment plans and the region's own plans.

Enabling market access

RVMC will bring together the organisations best placed to address specific access challenges, and help them to sequence their contributions. Each convening will focus on a single issue with multi-stakeholder participation, for example, a convening on pooled procurement bringing together senior officials from ministries of health, finance and trade, global and regional financing institutions, regional health and economic institutions, and implementing agencies.

Connecting the right partners

We will amplify the strengths in regional pathways and highlight where more engagement from partners would advance sustainable RVM. Once gaps are identified and prioritised according to the region's existing pathways, RVMC will connect the region to what it needs to close or de-risk them.

Case Study - ASEAN

ASEAN has an established vaccine manufacturing base, but turning national manufacturing ambitions into a sustainable regional ecosystem is complex.

Installed capacity is sufficient to meet projected regional routine immunisation demand, but production is concentrated among a few manufacturers, procurement is fragmented across member states, and regulatory barriers constrain cross-border market access.

RVMC commissioned the Clinton Health Access Initiative (CHAI) to undertake a regional landscape analysis and develop market-shaping recommendations, which identified three interconnected priorities: strengthening complementary manufacturing capabilities, enabling regional market access through regulatory cooperation, and consolidating demand to sustain commercially viable, outbreak-ready manufacturing.

Drawing on this and analysis from the World Bank[viii] and a landscape report from Thai NVI, RVMC is now working with ASEAN partners to turn this evidence into practical implementation pathways:

- RVMC is supporting member states to position their national manufacturing strategies and investments within regional and global market realities, building complementary capabilities aligned with regional priorities.
- At the regional level, RVMC is supporting the ASEAN Vaccine Security and Self-Reliance (AVSSR) initiative to advance discussions on pooled procurement, connecting policy choices with evidence on demand and manufacturer viability, and drawing on experience from other regions, including LAC's established pooled procurement mechanisms.
- RVMC is helping align emerging financing opportunities, including from the World Bank Group and other development partners, with ASEAN's regional priorities and market realities, connecting governments, regional institutions, financiers and technical partners around coordinated investment and implementation decisions.

In October 2026, the World Bank Group, CEPI, AVPN, and the Pandemic Fund jointly launched a $654 million financing partnership to boost vaccine security across ASEAN aligned with AVSSR and supported by RVMC[ix].







[viii] World Bank, ASEAN Regional Vaccine Manufacturing and Development: Regional Synthesis Report, Washington DC, World Bank, 2023 - https://openknowledge.worldbank.org/server/api/core/bitstreams/d3ab6559-6040-4532-b592-1953a309407f/content

[ix] World Bank Group - https://www.worldbank.org/en/news/statement/2026/10/16/health-works-vaccines-to-budgets-wbg-backs-proven-solutions-asean

Collaborative Support

Goal - Helping countries and vaccine manufacturers to advance concrete projects that strengthen sustainable RVM.

In addition to effective regional pathways, optimising RVM in a manufacturing project requires stakeholder access to implementation support.

Countries building or expanding RVM capability must ask: Can domestic demand and financing sustain a facility, and can regional market access provide critical mass? Is the national regulator sufficiently mature and part of a reliance mechanism enabling regional recognition of its products? Which projects can they support without competing with much more established manufacturing locations?

Vaccine manufacturers also face challenges securing stage-appropriate financing, predictable demand and market access, navigating unpredictable regulatory timelines and WHO prequalification, and managing restrictive technology transfer terms.

RVMC is uniquely positioned to provide coordinated, practical support for prioritised country and manufacturer initiatives, using evidence-based global and regional insights to inform RVM decisions.

RVMC's advisory support to several countries, now extending to vaccine manufacturing projects, provides a foundation for this initiative.

In 2028–2032, RVMC will provide targeted, project-level advice to countries and companies, coordinating key relationships, sequencing decisions and clarifying roles to reduce risk. Support will focus on early, pre-feasibility work; RVMC will step back when formal feasibility studies and market assessments are needed to protect its independence.

Project support will be assessed against regional priorities, a viable path to sustainability, potential impact within RVMC's 2028–2032 strategy period, and contribution to a healthy regional market. Selection criteria will be refined in the 2028–2032 implementation plan.

RVMC will convene the best-placed partners for each project, reflecting existing agreements with organisations specialising in technical advice, market assessments, regulatory strengthening, and pandemic preparedness and response.

From: 2028-2032 we will:

1. **Support countries to develop more comprehensive RVM policies and plans — working with senior government leadership and providing strategic framing and evidence synthesis, not drafting national policies**
2. **Facilitate connections to relevant partner networks, financing options and demand-side stakeholders to help manufacturers understand the conditions for sustainable demand**
3. **Advise institutional investors on RVM ecosystem barriers and enablers, helping to de-risk investments**

NOTE ON RVMC'S ROLE AND SCOPE:

RVMC won't deliver hands-on technical implementation or bid for/deliver our work under a competitive tender process; instead, our role is to serve as an independent strategic collaborator who helps bring together the partners with the appropriate expertise and mandate to help implement each project.

Collaborative Support

Core Activities

Support for countries

We will focus our advisory services on helping stakeholders navigate the political, technical and market complexity of building or expanding manufacturing capability. We will primarily respond to country requests for support where they align strongly with regional priorities and our selection criteria. RVMC's support can include:

- **Stakeholder landscape analysis** – mapping the institutional and political landscape shaping a region or country's manufacturing ambitions and flagging risks of duplication or misalignment.
- **Evidence synthesis** – consolidating existing market, financing and regulatory evidence and insights to clarify assumptions and knowledge gaps, without duplicating bespoke studies.
- **Contextual and strategic framing** – situating national ambitions within regional and global market realities, and testing them against market timing, cost, technology transfer partner interests and competition.
- **Alignment of partners** – helping align political and technical stakeholders, clarify trade-offs between multiple domestic projects, and right-size ambition.
- **Decision support** – identifying the critical questions and preconditions for success and offering simple triage frameworks to sequence or redirect decisions where warranted.
- **Alternative approaches** – where appropriate, advising countries to focus on related comparative advantages rather than manufacturing, such as clinical trials, regulatory excellence and mutual recognition, production of manufacturing inputs or therapeutics and diagnostics.

Support for vaccine manufacturers

RVMC will convene and coordinate support for a small number of manufacturing projects at a time, bringing technical agencies, financing institutions, regulatory experts, and implementing organisations together around a shared project. Support will only be provided for companies that request support and that fit within our selection criteria.
RVMC's support will:

- **Refine thinking** – working with manufacturers considering expansion or new investment, through a sequence of questions on what to do, how and when, and how to de-risk the investment.
- **Coordinate advisory support** – bringing together the right mix of technical and financing partners to identify bottlenecks, align inputs and clarify pathways, accelerating timelines and enabling initial and sustained market access for prioritised, regionally endorsed projects.
- **Ensure coherence across inputs** – integrating advisory guidance so that projects receive consistent recommendations and sharing best practice across projects and regions.

Projects prioritised through regular reviews with each regional partner under the Regional Pathways Initiative may receive either short-term, concentrated support funded from RVMC's own budget, to accelerate progress and demonstrate the potential for scale-up, or medium- to long-term strategic guidance to build sustainable capability for a new platform or technology, supported through external funding and co-funding.

Case Study - Ghana

The Government of Ghana had allocated substantial financial support to strengthen domestic vaccine manufacturing, but local vaccine projects were at different stages and material constraints remained across regulation, procurement, financing and the market itself.

The government wanted to know how to use finite resources and its enabling powers to give domestic vaccine manufacturing the strongest realistic pathway. The Ghana National Vaccine Institute (NVI) invited RVMC to help it address this question through a week-long Expert Consultation. This required looking beyond the immediate needs of individual manufacturers to understand the broader ecosystem conditions necessary for success, and how government, or other partners, could best use their resources and enabling powers to address critical gaps and create a more sustainable pathway for domestic vaccine manufacturing.

Through a carefully curated programme of discussions with government, manufacturers, procurement actors, funders and global health partners, alongside site visits and bilateral meetings, RVMC helped NVI bring the most consequential questions into focus, drawing on credible evidence and relevant expertise to explore stakeholder plans and test their underlying assumptions. Throughout the process, RVMC worked alongside government counterparts to interpret emerging insights in real time, connect findings across discussions and translate complex technical and market evidence into practical considerations for government decision making.

RVMC's support focused on:

- Aligning stakeholders around a shared fact base on the global and continental supply and demand landscape, its direction of travel, and how these trends bear on the government's ambitions, including the implications for Ghana's manufacturing ambitions and the broader conditions needed to establish a sustainable domestic vaccine manufacturing ecosystem.
- Building a clearer picture of the plans, roles and interdependencies of domestic manufacturers, government institutions and other ecosystem actors in light of both government commitments and wider dynamics, including Gavi graduation, the evolving outlook for Gavi 6.0, and potential pressures on procurement and suppliers.
- Equipping Ghana NVI and other government entities with evidence and insights to explore how government financing, policy measures and other forms of support could best work together to strengthen the manufacturing ecosystem and enable domestic vaccine production.

The Expert Consultation process helped NVI and government counterparts develop a clearer understanding of the most credible pathways forward, the key decisions and dependencies along those pathways and how available resources could be deployed to enable progress. Importantly, by working through the evidence and trade-offs alongside RVMC and external experts, government counterparts also strengthened their own capacity to critically assess proposals, navigate competing priorities, and make informed decisions as circumstances evolve in the future.







Inter-regional Cooperation

Goal - Bringing regions together to identify the best opportunities for collaboration, and giving regions in the Global South a stronger voice in global discussions on sustainable regional vaccine manufacturing.

Optimising RVM between regions requires a platform for effective co-operation. Growing vaccine manufacturing ambitions across Africa, ASEAN and LAC risk fragmentation and duplication, with regions pursuing similar goals but limited opportunities to compare approaches, share learning or align with global mechanisms.

Strong regional manufacturing ecosystems need effective connections to strengthen one another and the global system. Africa, ASEAN and LAC share challenges in building sustainable RVM but often lack dedicated capacity to track other regions' work and translate shared challenges into practical collaboration.

Where regional priorities warrant, RVMC will also engage beyond its three focus regions: other regions advancing RVM, including parts of the Eastern Mediterranean; technology and manufacturing partners in Europe, the US, China, India and Japan; and global entities including WHO, CEPI, Gavi and UNICEF.

The Inter-regional Cooperation Initiative offers a trusted space for cooperation on regional priorities. RVMC 2.0 laid the foundation by co-hosting the first Sustainable Markets Convening with Africa CDC, PAHO and Thai NVI in April 2025. This opened opportunities for Africa to learn from PAHO's successful Revolving Fund and helped catalyse an international technical working group on pooled procurement for ASEAN. RVMC then supported Thai NVI and the National University of Singapore in global pooled procurement exchanges, connecting ASEAN's work with other regions' experience and networks. A second global Sustainable Markets Convening is planned for 2027.

In 2028–2032, RVMC will expand this work, providing an ongoing platform for peer learning, practical collaboration on shared priorities, cross-regional market exploration, and regional–global alignment. It will also strengthen regions' voices in global policy, financing, procurement, regulatory, and manufacturing discussions.

This work will be driven by what regions themselves identify as priorities.

From: 2028-2032 we will:

1. **Inter-regional learning – facilitate the transfer of experience and models between regions through dedicated working groups**
2. **Inter-regional market development – identify opportunities for exchange between regions and manufacturers on the ecosystem features needed to make cross-regional vaccine trade more efficient and effective**
3. **Effective advocacy – highlight challenges and opportunities for RVM through targeted communications, and develop policy messages for regional-to-global dialogue, where evidence and regional consensus support them**

NOTE ON RVMC'S ROLE AND SCOPE:

We will broker introductions between partners where this serves existing regional priorities, but we won't negotiate deals between manufacturers or regions. We will also support and strengthen the institutions and the working groups that already exist; we won't create a new institution or permanent decision-making body.

Inter-regional Cooperation

Core Activities

Learning

The initiative will focus on areas where inter-regional exchange can unlock practical progress, such as comparing regulatory pathways; sharing approaches to demand and pooled procurement; connecting demand- and supply-side financing more effectively; lessons from successful technology transfers; and strengthening workforce and supply chain resilience.

Priorities for facilitating the transfer of knowledge and experience will be set by the regions.

Market development

Exploring cross-regional market opportunities, focusing on where: existing products have the potential to meet needs across more than one region; new product introductions could be planned to benefit from demand across regions; and coalitions of interested countries could identify partnering opportunities with mature manufacturing countries and global initiatives.

Advocacy

Evidence and structured discussion in the working groups will clarify what regions need and support effective engagement with global initiatives. Insights will also feed directly into RVMC's engagement with related global entities such as the Global Coalition for Local and Regional Production, Innovation and Equitable Access and the Pasteur Network, translating regional lessons into practical advice, case studies and policy input.



Case Study - First Sustainable Markets Convening

Following the release of RVMC's 2040 Vision for RVM, the RVMC Secretariat invited Africa CDC, PAHO and Thai NVI to co-design a global gathering to tackle a pressing shared challenge. The regions collectively identified predictable demand for regionally produced vaccines as the most urgent challenge.

This appetite was already visible in emerging partnerships between regions, including the Memorandum of Understanding between Africa CDC and PAHO, which RVMC facilitated, and PAHO's collaboration with the WHO Regional Office for the Eastern Mediterranean to establish pooled procurement mechanisms drawing on lessons from PAHO's Revolving Fund.

The first Sustainable Markets Convening took place in April 2025 alongside the World Local Production Forum in Abu Dhabi, bringing together 66 participants and 22 speakers from governments, regional institutions, manufacturers, financiers and technical partners. It consolidated previously disparate discussions into a shared problem statement and action agenda.

Participants underscored that fragmented and uncertain demand signals continue to undermine manufacturer and investor confidence and called for clearer policy and financing commitments to purchase regionally produced vaccines, stronger regional coordination of procurement, and closer alignment between regional ambitions and global mechanisms.

The Secretariat published the convening's findings and has sustained momentum through a working group and by supporting regions to participate in one another's meetings. The work also contributed to a technical working group, led by Thai NVI and the Behavioural and Implementation Sciences Interventions unit at the National University of Singapore, to assess pooled procurement options in ASEAN: a tangible example of regions turning shared learning into action.







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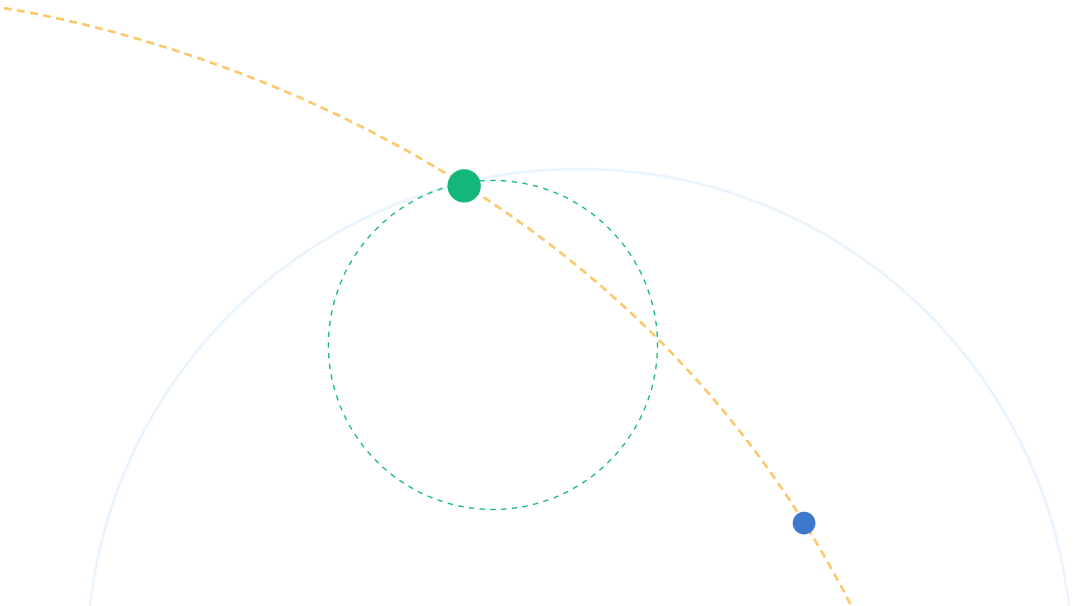
Delivery and resourcing

How we will work | Resourcing | The transition to 2028

How we will work

Small and agile - RVMC enters this strategy with nine staff and a small number of long-term consultants and expects to grow moderately as it takes on more project-level collaborative support and financing advisory work.

Principles - As its work becomes more action-oriented, RVMC will strengthen governance guardrails to protect the independence on which its value to all partners depends. Four principles will guide how we operate: regional ownership as a constant, a bias towards action, working with partners, not just through them, and remaining lean and focused, growing in depth rather than in geographic or thematic scope.



Resourcing

$35m

The baseline budget for the Secretariat to deliver the 2028–2032 strategy across the four strategic initiatives is $35 million. The $7 million annual budget will enable the Secretariat to develop new or enhanced capabilities including manufacturing project-level support, financial analysis and financing advisory skills, resource mobilisation and donor reporting, and deeper regional expertise with staff continuing to be embedded across Africa, ASEAN and LAC.

RVMC's funding model combines in-kind support from CEPI; unrestricted, multi-year core funding that sustains the Secretariat and preserves its independence and flexibility; and project-based cost-sharing or co-funding tied to specific initiatives, which can draw on a broader range of funders with thematic interests. RVMC will treat resource mobilisation as a continuous process, seeking multi-year core funding from bilateral and multilateral partners, development finance institutions, philanthropic foundations, and regional bodies and governments.

The transition to 2028

This strategy has been shaped through extensive consultation with regional bodies, manufacturers, funders, technical partners and global health institutions. During 2027, we will balance delivery of our RVMC 2.0 KPIs, which bridge to this strategy, with detailed implementation planning with partners, including developing suitable KPIs for the 2028-2032 period with an outcomes and impact focus. To deliver this new strategy we will target investment during 2027 in five areas:

1. **Data and evidence** - deepen relationships with holders of RVM-relevant datasets and with manufacturers, whose engagement validates the data. Invest in the data infrastructure to sustain this evidence base, including evolving the RVMC website into an interactive RVM resource.

2. **Regional joint planning** - work with each regional lead entity to develop workplans aligned with that region's own pathway and clarify where support is most needed. Map with the regions the best opportunities for cooperation between them.

3. **Collaboration and partnerships** - build the technical, financial, and regulatory partnerships needed for project-level support, including with the Global Coalition for Local and Regional Production, the Pasteur Network, WHO, and Gavi's African Vaccine Manufacturing Accelerator.

4. **Advocacy and communications** - expand advocacy and communications to disseminate insights, build thought leadership, and engage regional and global policy forums.

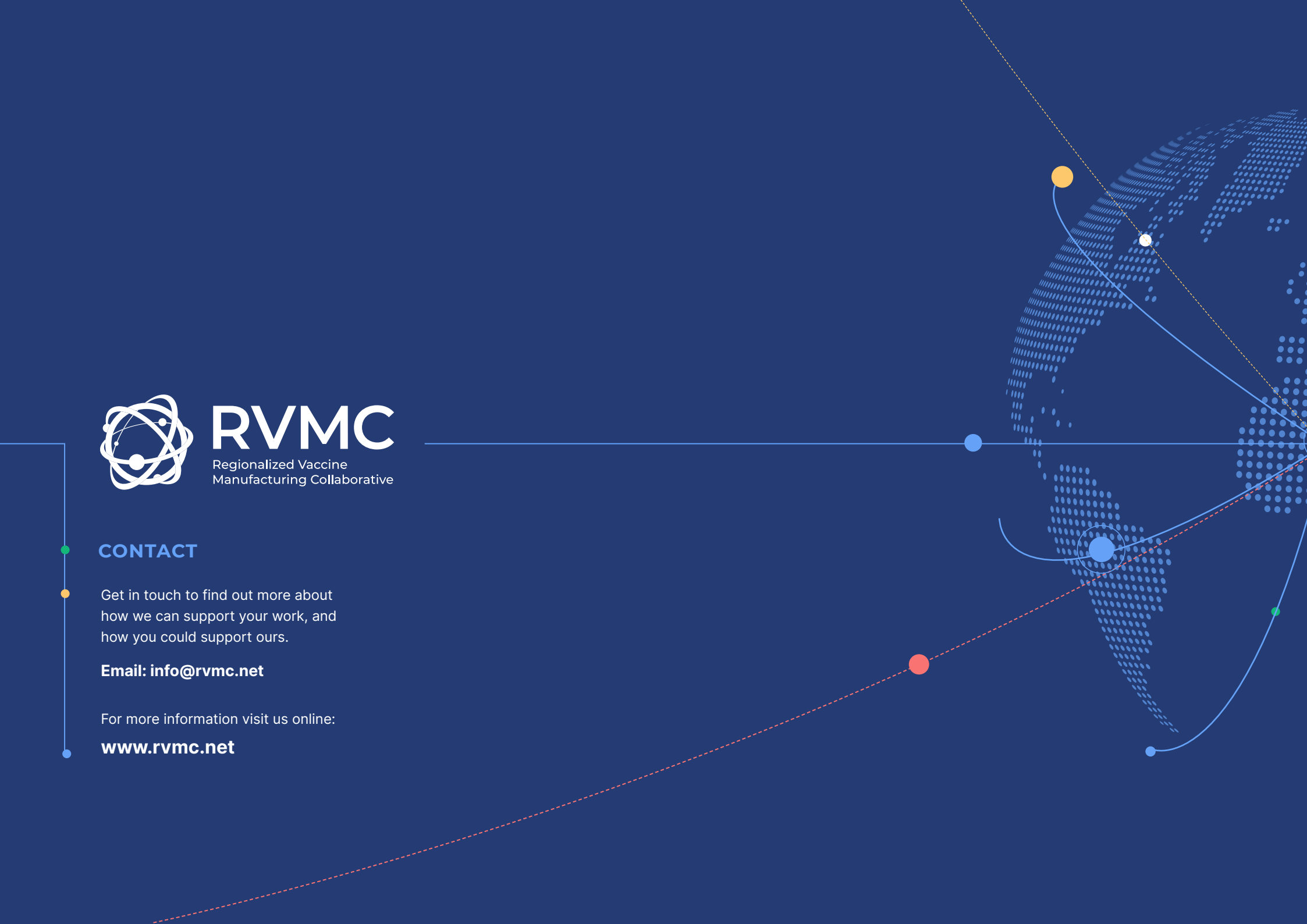
5. **Secretariat capacity** - build the Secretariat's expertise to deliver analytical support and work with technical, financing, and regulatory partners — flexing from hands-on support to a lighter connecting role depending on regional maturity.

Delivery will be sequenced so that foundations are in place before activity scales. By the end of RVMC 2.0, we will have piloted project-level support with a small number of partners, and the lessons will shape how that support scales over the strategy period.

The work will remain responsive as priorities evolve, with the balance of support in each region shifting as its own pathway matures. Progress will be reviewed with regional partners and reported to the Executive Committee and the Strategic Advisory Board.

RVMC will monitor developments that could materially affect the feasibility, prioritisation, or impact of this strategy, particularly the shifts in context that shaped it, and will track strategic triggers that signal when its assumptions may no longer hold. These may include a major outbreak, significant changes in global procurement or financing policy, material shifts in regional regulatory arrangements, the entry or exit of key manufacturers, or changes in the capacity or priorities of regional partners. Where such triggers affect RVMC's ability to deliver its intended impact, we will undertake proportionate, targeted reassessments that adjust priorities, sequencing, delivery approaches or partnerships rather than reopening the strategy wholesale.

Risk management will be embedded in implementation planning and annual operational cycles, with operational, financial, partnership, and reputational risks, including risks to RVMC's independence, identified and mitigated with clear ownership and escalation.



RVMC

Regionalized Vaccine Manufacturing Collaborative

CONTACT

Get in touch to find out more about how we can support your work, and how you could support ours.

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