

## EMERGING MARKETS: Covid-19 Vaccination Strategies and Challenges

Our EM Covid-19 vaccination table includes information on the immunization strategies selected EMs are pursuing and the challenges they face. Please do not hesitate to contact us if you want to discuss any of the countries mentioned in more detail.

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## Emerging Markets Covid-19 Vaccination Strategies and Challenges

	Vaccination strategy	Current state of vaccine rollout	Procurement	Main challenges
Argentina	Health sector personnel first in line for vaccine, to be followed in descending order by over 70s; over 60s; security personnel; vulnerable and at-risk in 18-59 age range; education sector; and strategic or vulnerable groups (e.g. prisoners).	Sputnik V vaccinations started on 29 Dec. As of 15 Jan, < 0.5% of population has received a first dose. Government proposal to delay second doses to expand coverage quickly abandoned after public backlash.	<b>Sputnik V</b> – approved by regulator and roll-out started; agreement for 30mn doses, 5mn to arrive by end-January. <b>AstraZeneca (AZ)</b> – approved by regulator; roll-out expected to start end-March. Contract for 22.4mn doses. <b>Sinopharm</b> – agreement for 30mn doses, 1mn of which to arrive by end-January. <b>COVAX</b> – agreement for 9mn doses; expected to arrive March/April.	January 2021 survey suggests up to 24% do not want to be vaccinated. Possible vaccine hesitancy springs from doubts over safety of Sputnik V vaccine, especially in over 60s.
Brazil	Phase 1: health workers; indigenous communities in demarcated territories; over 60s in care institutions; over 75s. Phase 2: 60-74s seniors. Phase 3: persons with comorbidities. Phase 4: education workers, homeless population, security and rescue forces, others.	Vaccination started on 18 Jan with delays in several states. First phase requires 15mn doses but only 6mn made available by state of São Paulo (CoronaVac).	<b>AZ</b> – negotiated by federal government (locally developed). Not available yet. <b>CoronaVac</b> – São Paulo state vaccine, 6mn doses already imported from China. <b>AZ</b> and <b>CoronaVac</b> emergency use approved. <b>Sputnik V</b> – emergency use rejected for 10mn doses. <b>COVAX</b> – minimum 10% of population quota (42mn) doses.	Federal government prioritized only AZ vaccine but had to rely on China's CoronaVac to avoid delays. International polls show Brazil has a 57% acceptance rate of Covid-19 vaccines.
Chile	Target to vaccinate 5mn people (ca. 26% of population) by end-Q1/2021 and 15mn people (80% of population) by end H1/2021. Medical workers first to receive vaccinations, to be followed by elderly in care homes; over 65s; key workers in public bureaucracy; people with other co-morbidities.	Pfizer vaccinations started in late-Dec; under 100,000 people (mainly medical personnel) vaccinated so far.	<b>Pfizer</b> – agreement for 10mn doses; <b>Sinovac</b> – agreement for 60mn doses over three years; regulatory approval said to be imminent; <b>AZ</b> – agreement for 14.4mn doses. <b>COVAX</b> – agreement for 8mn doses. Talks ongoing with Russia's Gamaleya Institute ( <b>Sputnik V</b> ).	Public skepticism over vaccines declining, though 22% still say they do not want to get vaccinated. Public confidence could be impacted by lower Sinovac efficacy rate and transparency concerns.
China	Goal to vaccinate 50mn people (two doses each) before Lunar New Year holiday in mid-February, when hundreds of millions of people travel.	10mn Chinese vaccinated as of 13 Jan, after regulators approved Sinopharm vaccine on 31 Dec. Military, diplomats, construction workers on foreign projects, and study-abroad students were vaccinated earlier under emergency use orders issued in Jul 2020.	Government has approved two vaccines; three others are in phase 3 trials. It remains unclear how Beijing will allocate vaccine supply between domestic use and export commitments.	Sinopharm yet to release detailed efficacy data. CoronaVac only 50% effective in preventing infection, though nearly 100% effective in preventing severe cases requiring hospitalization and 78% effective in preventing mild cases.
Colombia	Plan is to vaccinate 68% of the population (34mn people) by end-2021. Medical personnel first in line, to be followed by elderly and clinically vulnerable. Target is to vaccinate 6.5mn people by end-April and 26mn by end-July. Roll-out will be based on network of 3,000 vaccination centers.	Vaccinations to start from early Feb; government has come under fire for slow response and failure to provide start date for roll-out.	<b>Pfizer</b> – obtained regulatory approval early Jan; agreement for 10mn doses, of which 1.7mn to arrive in Feb; <b>AZ</b> – 10mn doses agreed; delivery to start Feb; <b>J&amp;J</b> – agreement for 9mn doses; <b>COVAX</b> – agreement for 20mn doses.	44% of population would not be willing to be vaccinated, according to Dec 2020 survey; this may have changed due to deterioration in health situation. Poor infrastructure in rural areas could create distribution challenges.

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Czech Republic	Priority is given to frontline medical staff, followed by care home residents and employees; elderly (first over 80s, then over 65s); people with chronic illnesses; rescue workers.	Vaccination started on 27 Dec. As of 18 Jan, 1.01% of population have received first dose of BioNTech-Pfizer vaccine. Online registration system has been experiencing technical issues.	Procurement conducted exclusively via the EU.	Politicization of vaccination process ahead of Oct 2021 parliamentary elections. Around 40% of population unwilling to get inoculated.
Egypt	Medical staff, elderly and those with chronic conditions will be prioritized, but plan is not fully elaborated.	Broader vaccine rollout expected in beginning of Feb. Egypt received first batch of China's Sinopharm vaccine in Dec (50,000 doses) but appears not to have administered it.	<b>COVAX</b> – agreement for 20mn doses of AZ vaccine. <b>Sinopharm</b> – undetermined number of Sinopharm vaccines. Contracts reportedly signed for 20mn doses of <b>Pfizer</b> vaccine and 30mn doses of <b>AZ</b> . <b>Sputnik V</b> – 25mn have been secured but vaccine still under evaluation.	There is widespread skepticism that government statistics accurately reflect the pandemic situation in Egypt.
Greece	Priority given to healthcare workers, key government personnel & care home residents and staff. In Stage 2, elderly over 70 will be vaccinated, prioritized in 5-year brackets, to be followed by those in high-risk groups, other key government workers. In Stage 3, general public will be called forward.	Vaccination began on Dec 28. As of 19 Jan, 93,179 people (0.89% of population) have been vaccinated, with daily rate now at around 5,500. Government aims to ramp this up to as much as 60,000 per day from Feb.	Greece is bound to the EU's procurement process.	Slow rollout has been criticized by opposition parties, especially as Greece has large elderly population (1.7mn people over 70). Nov opinion polls suggest 30-40% of Greeks reluctant to get vaccine.
Hungary	Priority given to medical staff as well as care home residents and staff, followed by elderly (aged 60+); staff of uniformed services; public servants; people with chronic illnesses; workers in "critical infrastructure".	Vaccination started on 26 Dec. As of 20 Jan, 130K people (>1.3% of population) have received first dose of Pfizer-BioNTech vaccine (mostly medical staff and care home residents).	Hungary is bound to the EU's procurement process. Talks are ongoing with Israeli, Russian and Chinese manufacturers, but their approval is pending in Hungary or the EU. Their large-scale deployment in Hungary is unlikely.	Vaccine skepticism relatively widespread, perhaps explained by lack of clear information and government's push for Russian and Chinese vaccines.
India	30mn frontline health, sanitation and security personnel to be vaccinated first. All over 50s and those younger with co-morbidities will follow.	The vaccine rollout started on 16 Jan. Only 454,059 people vaccinated to date. Government aims to vaccinate 300mn people by end-Aug.	Two vaccines have received emergency approval: <b>AZ</b> vaccine (known in India as Covishield), and India-produced <b>Covaxin</b> . Four more vaccines – including Russia's <b>Sputnik V</b> – could be available soon. Phase 3 trials of Sputnik V are conducted in India.	High skepticism about Covaxin vaccine – still in phase 3 human trials and data on efficacy yet to be published. Polls show ca. 70% of Indians hesitant about receiving Covid-19 vaccine.
Indonesia	Frontline healthcare workers estimated at 1.3mn will be first, followed by security personnel, then teachers of 17mn; working age 15 – 59 will be vaccinated ahead of the elderly. Vaccines procured by central government and distributed; free, not mandatory.	Vaccinations will start with 1.3mn doses through Feb; production of additional doses will start domestically in Jan.	<b>Sinovac</b> – 125mn doses; <b>Novavax</b> – 50mn doses; <b>COVAX</b> initiative – 50mn doses; <b>AZ</b> – 50mn doses.	Main challenge will be uneven cold-chain infrastructure and possible vaccine hesitancy because of religion and risk perception (from vaccination).
Kenya	Details still unclear. Kenya is seeking 24mn doses to vaccinate about 20% of population in 2021. Priority to be given to frontline medical workers, essential workers (police, teachers, students), people with comorbidities and those aged 50+.	Not yet started.	Kenya seems heavily reliant on <b>Covax</b> . To date, Kenya has mainly ordered <b>AZ</b> vaccines (first arrivals expected mid-Feb). Negotiations also reported with <b>Pfizer</b> and <b>Sinopharm</b> . Additional allocations from African Union's African Vaccine Acquisition Task Team.	Logistical and infrastructure challenges. Transparency and corruption concerns. Possible politicization ahead of mid-year constitutional referendum.

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South Korea	First doses will be distributed to medical workers and elderly. Government has signed preapproval agreements for enough doses to vaccinate entire population.	Not yet started. AstraZeneca vaccine under review, distribution expected to begin in Feb. Government will shorten approval process from 180 days to 40 days; distribution process will be reduced to 20 days from approval.	Government was slow to conclude purchasing agreements, believing it could wait due to low case numbers. <b>AstraZeneca</b> : 20mn doses; <b>Pfizer-BioNTech</b> : 20mn doses; <b>Moderna</b> : 40mn doses; <b>Janssen</b> : 6mn doses; <b>COVAX</b> : 20mn doses.	Government's support has fallen due to delays in vaccine acquisition. After cases surged in late 2020, government rushed to conclude purchasing agreements, but delivery timeframes unclear.
Malaysia	Frontline medical workers, police and army officials will be prioritized in vaccine rollout.	AstraZeneca vaccinations expected to start in Feb.	<b>AZ</b> – 6.4mn doses via <b>COVAX</b> facility and another 6.4mn contracted directly; <b>Pfizer-BioNTech</b> – 25mn doses secured. Final negotiations with <b>China's Sinovac</b> for 14mn doses, <b>CanSino Biologics Inc.</b> for 3.5mn, and Russia's <b>Sputnik V</b> for 6.4mn.	Roll-out could be slowed by logistics at rural level and political weakness at top.
Nigeria	Vaccination targets: 40% of population in 2021, 70% by end-2022. Healthcare personnel; people over 50; people with underlying health conditions to be prioritized. Most heavily affected states will be prioritized in allocation of doses.	Roll-out is supposed to start in Q1/2021.	20% of vaccines supposed to be supplied through the <b>COVAX</b> initiative. 100k doses of <b>Pfizer-BioNTech</b> vaccine expected to arrive by end-January 2021. Government reportedly in negotiations with Russia and China to procure <b>Sputnik V</b> and/or <b>Sinovac</b> vaccines.	Vaccination roll-out could be hampered by mistrust of state institutions, particularly across majority Muslim north. Lack of cooling facilities and poor road networks will pose major challenges.
Pakistan	Those above 65 and frontline workers to be vaccinated first.	Roll-out yet to start. China's <b>Sinopharm</b> vaccine could arrive in Pakistan in early Feb. <b>AZ</b> 's vaccine could be rolled out by Mar.	Emergency use permission given to <b>AZ</b> , <b>Sinopharm</b> and <b>CanSino</b> . Both Chinese vaccines currently undergoing clinical trials. Four more vaccines in the pipeline.	Given low testing capacity, the pandemic's scale is difficult to assess.
Peru	Phase 1 to focus on medical and other frontline emergency personnel, including election staff (given proximity of national elections). Phase 2 to focus on over 60s, those with co-morbidities, and indigenous population.	Vaccinations have yet to start; earliest start date end-January. November 2020 political crisis interrupted procurement process.	<b>Sinopharm</b> – contract for 38mn doses, 1mn of which to arrive by end-Jan. <b>AZ</b> – agreement for 14mn doses to arrive in Sep. <b>Pfizer-BioNTech</b> – pre-agreement for 9.9mn doses canceled amid political difficulties. <b>Covax</b> – agreement for 13.2mn doses but timing of arrival unclear. Ongoing talks with J&J, Russia's Gamaleya Institute, and CureVac.	Logistics of roll-out will be challenging, especially in remote regions. Election campaign could see misinformation, while change of government in July 2021 could disrupt vaccine roll-out.
Philippines	Vaccine roll-out will prioritize healthcare workers; workers in education, social welfare agencies; law enforcement and military personnel; the poor; senior citizens; other vulnerable population.	Vaccinations could start around April (AZ vaccine). Government is promising earlier vaccinations using Pfizer and Sinovac, but status of procurement is unclear.	2.6mn doses of <b>AZ</b> procured; government is promising <b>Sinovac</b> and <b>Pfizer-BioNTech</b> in Q1/2021 but status of procurement and delivery timetables uncertain. Local governments are procuring on their own.	Logistics challenges for cold chains, government procurement and vaccine hesitancy could slow vaccine rollout.
Poland	Vaccine rollout envisaged in four stages: Stages 1 and 2 will include medical and administrative staff in healthcare institutions; employees of care homes; university teachers and medical students; care home residents; elderly aged 60+; and teachers.	Vaccination started on 27 Dec. As of 18 Jan, 541K doses have been administered (1.4% of population).	Procurement exclusively via the EU. Expected delivery of 6mn doses from <b>Pfizer-BioNTech</b> , <b>Moderna</b> and <b>CureVac</b> by March. As of 18 Jan, 1.26mn doses delivered. About half are reserved for the second shot.	Vaccination process compromised by well-known leaders and influencers jumping the queue. More than 40% of citizens are unwilling to get immunized.

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Russia	Priority groups: 1) medical staff, teachers/lecturers, residents and staff of care institutions, citizens with chronic illnesses; 2) uniformed services, transport and energy sector employees, volunteers; service workers; 3) civil servants, students, people subject to conscription.	Vaccination started in early Dec. According to official statements, as of 11 Jan around 1mn people had received Sputnik V vaccine in Russia.	Russia relies solely on its own <b>Sputnik V</b> vaccine. Authorities expect to release 2.1mn doses into civilian circulation by end- Jan. Second domestic vaccine <b>EpiVac</b> has been approved by the country's regulators and is undergoing clinical trials. No foreign vaccines approved.	High level of vaccine skepticism – 60% of citizens are unwilling to get immunized; logistical challenges given the country's size and varying administrative capacity across regions; limited transparency; and data inconsistencies.
Saudi Arabia	Phase 1 of roll-out will prioritize those over 65, and phase 2 those over 50.	Vaccinations reportedly started in mid-Dec. As of 17 Jan, 295,530 doses have been administered (0.85% of population).	<b>Pfizer-BioNTech</b> – only vaccine officially approved for administration; <b>Sputnik V</b> – government has secured an unknown number of doses.	Government is squarely behind vaccine effort and widespread compliance is expected.
South Africa	Plans to vaccinate 40mn South Africans in 2021. Phase 1: ca. 1.2mn frontline health workers; Phase 2: ca. 16mn essential workers, people in institutions (care homes), people above 60, people with comorbidities; Phase 3: ca. 22.5mn remaining adult population.	Rollout yet to start. Phase 1 expected to commence late Jan/Feb.	Procurement lagging. Relying on <b>Covax</b> , SA expects up to 12mn vaccine doses plus allocations from African Vaccine Acquisition Task Team. 1.5mn <b>AZ</b> vaccines under deal with Serum Institute of India (Jan/Feb). Overall, 30mn doses promised, but deals with manufacturers yet to be finalized. Regulatory approval needed from SAHPRA.	Procurement delayed by slow negotiations with manufacturers and mounting fiscal crisis. Logistical and governance challenges. Ipsos survey suggests only 53% are willing to get vaccinated.
Thailand	Vaccine rollout strategy still being formulated but elderly people, frontline healthcare and social workers, and people with higher-risk health profiles will likely receive priority.	Sinovac vaccinations expected to start in Feb.	<b>Sinovac</b> – 2mn <b>AstraZeneca</b> – 61mn (imported and local joint venture).	Slow procurement because of preference for domestic manufacturing.
Turkey	Vaccination program divided into four stages, starting with medical personnel, pharmacy workers and the elderly; followed by security forces, teachers, those working in food industry, over 50 age group, those with chronic illness and rest of adult population.	Vaccine rollout started on 13 Jan with China's Sinovac. As of 19 Jan, 1.3% of population has received a first dose. Government currently only has sufficient vaccine to inoculate < 2% of population.	<b>Sinovac</b> – approved by regulator and rollout started; agreement for 50mn doses, of which 3mn were delivered on 30 Dec, but unclear when further deliveries will arrive. <b>Pfizer/BioNTech</b> – agreement for purchase of 4.5mn doses, delivery due end-March. Turkey has not joined <b>COVAX</b> .	Delays in vaccine deliveries likely to result in program falling short of targets of 35% of population (84mn) by end-March, 60% by end-June. Widespread skepticism with more than 40% of population unwilling to be vaccinated.
UAE	Priorities vary by Emirate, but they generally emphasize the elderly, the medically compromised and health care and front-line workers.	Around 20% of population has been vaccinated. Dubai has emphasized the Pfizer vaccine, Abu Dhabi the Sinopharm vaccine. Target is to inoculate 50% of population in Q1/2021.	<b>Sinopharm</b> and <b>Pfizer/BioNTech</b> are the two approved vaccines.	With a small and concentrated population and widespread government support, the UAE is likely to have very high compliance.