

THE BORDER CONSORTIUM

Mid Year Overview: January to June 2018

CONTEXT

The situation in Burma/Myanmar continued to be fragile. The first half of the year demonstrated a clear pattern of increased activity by Myanmar's Armed Forces (the Tatmadaw) throughout the country; asserting wider control especially in areas of influence for the ethnic armed oppositions. Clearance operations and artillery attacks in Kachin, Northern Shan and northern Karen States in early 2018 displaced over 10,000 people. In the west, the Rakhine crisis drove a massive number of refugees to Bangladesh in 2017 who are not able to return with some still fleeing for Bangladesh at the time of writing. Pressure from the International Community for the National League for Democracy (NLD) government and the Tatmadaw to address widespread and systematic violations and abuse escalated.

The formal peace process continues to falter. While the New Mon State Party and the Lahu Democratic Party became signatories to the Nationwide Ceasefire Agreement, the Tatmadaw has not demonstrated equal commitment to build confidence. Instead, restrictions were imposed on the Ethnic Armed Organisations (EAOs) efforts to hold consultations with communities in preparation for the National Dialogue. Tatmadaw attacks are also targeting civilian populations in Karen and Shan States, which are in violation of the ceasefire agreement and the spirit of the peace dialogues.

After multiple schedule changes, the third session of the Union Peace Conference took place in early July 2018 but resulted in little progress. The session was, however, more inclusive with almost all of the EAOs, including the Karen National Progressive Party (KNPP), observing the plenary sessions and participating in informal dialogue on the sidelines. An additional 14 points were approved, bringing the total number of agreed principles for the Union Accord up to 51. However, there has been no progress with regards to security sector reform and it is difficult to see how the remaining three sessions in 2018 and 2019, if followed, will deliver any tangible results before the 2020 elections.

Thailand remains under military rule since the coup in 2014, and there have been continuing delays in the elections timeline and further consolidation of political control by the military. Over the past year, however, the Royal Thai Government (RTG) has initiated discussions on the UN Refugee Convention, reviewing the need to sign the convention with regards to asylum seekers, refugees and stateless persons in the country. The RTG is also reviewing migrant worker conditions and looking at streamlining the process to regularise migrant labour in Thailand given that out of 3-4 million migrants, approximately only one and a half million are currently registered. The RTG is also committed to ending statelessness, opening opportunities for children of hill tribe and other stateless persons to apply for Thai citizenship. Refugees, however, are in a different category. They are not seen as stateless or asylum seeker groups, so current discussions do not include the camp populations.

South Eastern Burma/Myanmar

The Tatmadaw incursions into northern Hpapun in February 2018 in violation of the NCA, and subsequent ongoing clearance operations for road construction, displaced over 3,000 people. Sporadic skirmishes in southern Hpapun have also undermined confidence-building efforts more broadly in areas of potential resettlement for refugees in Thailand.

The Karen National Progressive Party (KNPP) negotiations to sign the NCA broke down in December 2017. Relations became more strained after Tatmadaw troops ambushed a KNPP checkpoint and killed three KNPP soldiers and a civilian in December 2017, as well as wider disagreements on the federal structure. However, in April KNPP and the Government's Peace Commission agreed to establish a monitoring mechanism for their bilateral ceasefire agreement as a confidence-building step towards KNPP signing the NCA.

Return planning

The lack of progress in the peace process and increased conflict in the ethnic armed areas continue to unsettle the camp residents and undermine their confidence regarding safe return. In addition to ongoing safety and security issues relating to the ongoing presence of Tatmadaw and Border Guard Force (BGF) troops, refugees remain concerned about a variety of issues including food insecurity, land tenure, the lack of infrastructure development in possible areas of return, and uncertainty regarding citizenship rights.

Since 2012 around 18,000 people have returned to Burma / Myanmar but only 163 through the formal UNHCR process. TBC continues to emphasise that UNHCR facilitated voluntary return is the primary mechanism for return. Refugees are encouraged to use this mechanism, as it will provide more comprehensive assistance for returnees and it is an entry point towards citizenship documentation. In early May 2018, 93 people from the group of 247 originally submitted to the Government of the Union of Myanmar (GoUM) returned to Burma/Myanmar. Initial feedback from UNHCR Burma/Myanmar suggests the returnees feel they have insufficient information on conditions in areas of return or the level of assistance they will receive in Burma/Myanmar. In addition, some were not familiar with the actual value of the Myanmar Kyat/Thai Baht cash assistance that they received. UNHCR, along with the International Organization for Migration (IOM) and World Food Programme (WFP), provide returnees with a cash grant equivalent of six-month's food assistance and start-up supplies as well as support for transportation. UNHCR continues to advocate with donors to increase support to returnees for up to one year; however, UNHCR remains unclear on what support will be provided to returnees by the GoUM. In June 2018 the GoUM conducted a third round of pre-nationality verifications that included 322 people. It is hoped that this group will be able to return in October of this year.

Both Karen and Karen Refugee Committees have been actively engaged with the Karen Committee for Refugee Return (CRR) and the Karen Refugee Repatriation and Reconstruction Working Group

(KnRRRWG) along with representatives from civil society organisations (CSOs), ethnic armed organisations (EAOs) and camp committees. The CRR has been focusing on completing the return survey in all seven camps to better inform the return plans with regards to the number of refugees willing to return and their intended return areas. KNU officials have been active partners in working in identified return areas/districts to prepare for future groups of returnees. Findings of the return survey will be consolidated and discussed with the CRR committee members during the second half of the year. Refugee leaders have continued consultations with community leaders and non-technical surveys in areas of potential return in Kayah and Karen States as well as Tanintharyi Region.

Refugee Camps

As of June 2018, TBC's monthly population report showed a verified caseload of 92,888 persons across all nine camps, compared to the population in December 2017 of 93,337 (net decrease of 449 refugees over six months). According to data by the International Organization for Migration (IOM) 1,505 refugees resettled to third countries so far this year. The family reunification process is closed, and UNHCR is now only focused on resettling serious protection and/or life-saving/serious medical cases.

The withdrawal of Swedish and Norwegian Government support at the end of 2017 continued the trend of fund reductions for the refugee camps in Thailand. TBC along with other agencies under the Committee for Coordination of Services to Displaced Persons in Thailand (CCSDPT) have been developing a comprehensive strategy for consolidation of services and a responsible exit. Individual sectors are developing plans for prioritisation and rationalisation of essential services that will feed into a wider joint CCSDPT strategy for 2018-2020. The joint strategy focuses on maintaining essential services, including food assistance, shelter, sanitation, healthcare, education and other forms of protection support. All of these are implemented within the framework of more inclusive and participatory camp governance. Members identified overarching issues, including the need for a fundraising strategy across sectors; challenges with staff turnover; prioritising and consolidating essential services; addressing challenges with the increased stress/anxiety of the refugees and ensuring participatory camp governance.

To ensure the protection of basic human rights and justice for refugees, TBC coordinates with Consortium and CCSDPT members, key agencies and local communities to identify remedies to protection and security concerns, and further reinforce dispute resolution and referral mechanisms in camps and areas of return and resettlement.

PROGRAMME HIGHLIGHTS

Burma/Myanmar

In Burma/Myanmar TBC works in partnership with civil society partners to support communities recover from the impacts of protracted conflict so that they will be more capable of absorbing an influx of returnees in due course. During the first half of 2018, this was supplemented by consultations with a

range of refugee leaders, EAOs and civil society organisations (CSOs) about developing protocols to broaden support for refugee return. The intention is to complement UNHCR's facilitated return process into government administered areas with a community-driven process for group return and resettlement into ethnic administered areas.

- In March 2018 over 3,000 people from 17 villages were displaced due to increased activities by the Tatmadaw in Hpakant Township of Karen State. TBC received Rapid Response funding from DFID via the Humanitarian Assistance and Resilience Programme – Facility (HARP-F) to support immediate needs of the displaced people. The Karen Office for Relief and Development (KORD), the Karen Women's Organisation and the Karen Department of Health and Welfare (KDHW), worked closely with the local authorities to successfully deliver essential support. This included cash transfers, shelter and non-food items (e.g. tarpaulins, blankets, hammocks, mats, mosquito nets and sanitary kits) and medical supplies. Despite the withdrawal of relief assistance for almost a year prior, the durability of community-driven emergency response capacities was demonstrated by the speed with which TBC and local partners were able to mitigate the impacts of conflict and displacement.
- With support from the Livelihoods and Food Security Trust (LIFT), the Karen Environmental and Social Action Network (KESAN), Human Rights Foundation of Monland (HURFOM), and other civil society partners have been able to strengthen customary tenure for communities affected by conflict in Karen and Mon States. Over 8,200 applications for individual land claims have been submitted to the KNU for registration; another 150 applications are seeking recognition from the Myanmar Government's land registration process. Over 900 farmers have either reclaimed their abandoned agricultural fields after years of conflict-induced displacement or improved their skills in sustainable agriculture during the past six months alone.
- Water supply, sanitation and nutrition interventions have been integrated in a way that is unprecedented in Karen and Mon communities affected by conflict. This is reflected by over 3,900 beneficiaries reporting improved access to and awareness of information about healthy infant and young child feeding behaviours during the first half of 2018. Similarly, over 800 households benefitted from improved access to domestic water supply and/or improved access to a sanitary latrine during the same period. These interventions have been led by the KDHW, the Backpack Health Workers Team (BPHWT) and the Karen Womens Organisation (KWO).
- With Australian government funding, TBC and partners have been mobilising six village tracts across Kayah State to prepare for group return and resettlement by refugees. The Karen Womens Organisation (KNWO) have facilitated gender sensitivity workshops with community leaders, in addition to empowering the female leaders, so that they may be in a stronger



Distribution of emergency assistance to the displaced person in Hpakant in June 2018

position to support female returnees. The Karenni Refugee Return and Reconstruction Working Group (KnRRRWG) raised awareness of protection mechanisms in each of these village tracts and facilitated an Economic Development Forum in Demoso Township to consult local authorities, private sector and community leaders about potential entrepreneurial and employment opportunities for returnees.

- With support from the European Union, TBC and civil society partners facilitated three community development forums in Hpasawng, Mese and Bawlakhe Townships of Kayah State. These forums brought together state and township level authorities with 39 village development committees to reflect on the past three years of experience in community-driven development. Possibilities for integrating community action plans into future township level planning processes were explored and encouraged.
- With funding from Christian Aid, TBC has been able to mitigate the impact from last year's withdrawal of food aid from camps for internally displaced persons (IDPs). KORD coordinated with EeTuHta IDP camp committee to distribute cash transfers of approximately US\$5 per month, or the cost of a month's rice supply, for all 380 children aged under 5 years of age. This has been complemented by KDHW and KWO disseminating information, education and campaign materials to promote healthy infant and young child feeding (IYCF) practices. A similar offer to address chronic malnutrition amongst children in the Shan IDP camps in collaboration was declined by Shan civil society agencies.

Thailand

The Thailand programme continues to support increased ownership of activities by the refugee communities, camp committees and CBOs, with TBC staff increasing focus on facilitation rather than implementation in the camps.

While return is difficult with the current political situation in Burma/Myanmar and the southeast, TBC continues to work with the recently established Return Committees to gather information about return plans through mapping of potential sites, as well as figures on refugees willing to return. Go and See Visits (GSVs) have continued to be organised by individual camps, broadening the composition of the groups to include the minority and vulnerable groups, and focused on livelihoods and water and WASH initiatives.

- GSVs continued during the reporting period with a total of five visits undertaken by representatives from Ban Don Yang, Tham Hin, Umpiem Mai, and Nu Po. These included a joint visit by representatives from Ban Don Yang and Umpiem Mai in March to Kayin State. Also in March, at the annual meeting of the KRC, it was decided that this organisation would take on a unified responsibility for planning and activities for any upcoming GSVs from the seven camps under KRC.
- The results of the [2017 Biennial Nutrition Survey](#) showed no adverse impact of the last ration changes that took place in 2015. According to the survey results, global acute (wasting) malnutrition rates continue to be low at an average of 2.1% (2.0% girls; 2.2% boys) based on the

3,905 children surveyed between six and 59 months of age. The 2017 stunting rates show a significant and consistent downward trend from 40.8% in 2013 to 35.1% in 2015, and most recently, to 31.8% in 2017. While the 9% reduction in stunting is significant, it remains a top priority for the Nutrition team to address, aiming for a WHO ‘acceptable’ rate of less than 20%. This issue will continue to be the primary focus of TBC’s nutrition support, and TBC will work collaboratively with all partners and donors on its ongoing efforts to reduce stunting malnutrition.

- The Food Card System (FCS) programme continued to be implemented in Tham Hin and Nu Po camps and during this reporting period, the programme expanded to two additional camps; Ban Don Yang and Ban Mai Nai Soi. The FCS programme facilitates expanding household nutrition choices and the refugees’ stronger sense of control over their family budgets. By the end of June 2018, 100% of eligible populations¹ in Tham Hin, Ban Don Yang and Nu Po camps, and 50% of Ban Mai Nai Soi were receiving their food assistance through the FCS. In line with the rollout schedule, the FCS was introduced to 50% of assisted population in Ban Mai Nai Soi at the end of May, with the other 50% continuing to receive in-kind food assistance at end of June. At the end of July 2018, 100% of the Ban Mai Nai Soi eligible population will receive food assistance through the FCS programme.
- TBC continued to provide trainings to build the capacity of refugee communities, camp-based staff, CBOs and Camp Committees, reaching 11,260 people (70% women) through various trainings conducted by TBC and CBO partners during the first six months. Subjects included peacebuilding, sexual and gender-based violence (SGBV) awareness, accountability, child protection, organisational management, accounting, the Code of Conduct, enterprise development, savings and loans, basic agriculture, and maternal nutrition and complementary feeding.
- The total number of stipend staff in June 2018 stood at 1,647 following the stipend budget cuts in February 2018. Due to further funding constraints, TBC continues to work with the Refugee Committees and Camp Committees on prioritising available resources towards essential and critical areas of support for refugees throughout 2018 and beyond.
- TBC’s Shelter and Settlement team continued to support and build the capacity of camp leaders in settlement planning and community space management to improve overall living conditions, especially to help planning for settlements upon return. The KRC and KnRC Housing Policy



Key nutrition messages in front of the FCS vendor

¹ Eligible refugee population refers to monthly assisted population with food and fuel supplies and is based on TBC’s Community Based Targeting (CMT) categories and the physical presence of individual refugees during the distribution.

continued to guide management of housing stocks in the camps. The Shelter Working Groups (SWGs) in each camp have taken main responsibility for day-to-day management of shelter issues. The ultimate goal is complete ownership of all housing responsibilities to the SWGs with limited and targeted technical support from TBC. As part of the housing stock management in the camps, SWGs in coordination with the camp committees and authorities have been ensuring dismantling of shelters upon departure of refugees. 288 shelters were dismantled during the period bringing the total number of shelters to 18,910 as of June 2018.

- The Shelter teams prioritised support for “shelter special needs” households in construction material delivery and repairs as well as support complementary activities related to energy saving and Community Driven Natural Resource Management (CDNRM).
- TBC continued to ensure household-level food security through links among nutrition, shelter, and the FSL. The Community Agriculture Programme (CAP) enables families to grow and produce food, as well as develop their entrepreneurship skills to assist them in gaining income and reducing vulnerability in preparation for return. During the first six month of 2018, 3,322 refugees (75% women) were reached through FSL activities, including trainings under the CAP and the Entrepreneurship Development Programme (EDP). Animal breeding, compost-making, bookkeeping, basic organic agricultural techniques, mushroom and rice cultivation, among other skills, were taught to FSL participants.
- TBC continued to provide targeted support to the KRC and KnRC Livelihoods Committees (LLHCs) as they assume primary responsibilities for livelihoods activities in the camps and joint initiatives in the return areas with host communities.
- With the expansion of the FCS to Ban Don Yang and Ban Mai Nai Soi, in addition to Nu Po and Tham Hin camps there are now 43 accredited vendors (16 in Tham Hin, 5 in Ban Don Yang, 8 in Ban Mai Nai Soi and 13 in Nu Po) who have been trained in using the new system for digital food retail transactions using android phones and mobile printers. The vendors have also received training on quality assurance of supplies, improving customer service, and carrying out transparent and accurate financial reporting and business management.
- The Camp Information Teams (CITs) continued to deliver information on preparedness and return, and other relevant issues to camp residents via public fora, visits to households, and support to visitors to the information centres. CIT have reached over 15,000 refugees (50% women).



FCS Vendor in Ban Mai Nai Soi

Organisation

- TBC activities continue to be guided by the [2017-2019 Organisational Strategy](#).
- To further consolidate TBC's activities in Thailand, TBC merged Food Security and Livelihoods staff with Nutrition, and the Shelter & Settlement work now is under the Community Management & Preparedness Programme. By the end of 2018 TBC will further merge Umphang field office with Mae Sot.
- TBC continued to reduce staff, with a total of 69 staff (46% female) remaining at the end of June.
- Coordination – TBC is on the Executive Committee of CCSDPT, the South East Working Group and the steering committee of International Peace Support Group.
- In May TBC convened the EGM meeting in Yangon with a donors' roundtable to discuss programme progress, highlights and challenges.
- TBC Board met regularly over teleconferences.
- TBC Annual General Meeting and Donors meeting will be held Nov 12th-15th in Mae Sot.

TBC FINANCIAL REVIEW

January- June 2018

A summary of the financial position as at 30 June 2018 is presented in the following table:

Thai Baht Millions	Budget	Actual June 2018	Forecast Dec 2018
Income	531	468	519
Expenses	610	328	588
Net Movement in Funds	-79	140	-70
Opening Fund Balance	244	244	244
Closing Fund Balance	165	384	174
Balance Sheet:			
Net Fixed Assets	2	2	2
Receivable from Donors	78	356	102
(Payable) to Suppliers	-35	-63	-30
Bank Balance	120	89	100
Net Assets	165	384	174
Restricted Funds	70	271	62
Designated Funds	75	80	80
General fund - Net Fixed Assets	2	2	2
General fund - Freely available reserves	18	31	31
Total fund Balance	165	384	174
Liquidity	85	27	70

Income

Actual Income from January to June 2018 totals THB 468M and is projected to be THB 519M by end of 2018, roughly 12M less than budgeted.

TBC has already realized 88% of its expected income and plan to reach 98% of the goal by end of December.

Government contributions make up for 94% of TBC Income. US Government continues to be the largest donor consisting of 66% of overall portfolio. The funding provides food commodities to all camps in addition to the Food Card System, which is currently operational in four camps.

TBC realized a 13M gain, mostly from the strengthening of the USD against the accrued rate.

Major contributions from the governments of Sweden and Norway in previous years were not a variable this year as they discontinued support.

Expenditures

The first six month expenditure totaled 328M (54% of budget) and the year-end forecast is expected to reach 588M (95% of budget), which would result in approximately 21M savings from the originally budgeted 609M total expenditure.

Comparatively, expenditure is currently 82M less than June 2017 and will be 115M less than all of 2017.

Key Reflections:

- Overall, actual commodity prices are 4-17% less than projected except for charcoal, which is 21% more than planned and consequently negating much of the potential savings, especially since it's the largest direct input.
- TBC is purchasing more actual commodities this year than originally planned because of delays in rolling out the food card system in new camps, thus requiring 55% more in the 2018 total budget.
- Conversely, the FCS will reduce its budget line by 52 % because TBC is still waiting on the Ministry of Interior for approval to roll out the FCS into new camp.
- There has been nominal reduction in the camp population, currently 92,000, compared to the planned average 89,000 so needs are similar to last year.
- Burma/Myanmar is spending according to the budgets
- GAP has expanded to cover more programing in Burma/Myanmar after AUP is finished in July.

Table showing expenditures by Strategic Objective and Activities with end of year forecast below:

	Strategic Objective and Activities	Budget 2018	Actual 2018 Jan-June	Forecast July-Dec 2018	Total Actual and forecast 2018	Burn Rate June 2018	Forecasted Burn Rate Dec 2018
	Exposure visits	1,000,000	55,922	685,000	740,922	6%	
	Return Working Groups	500,000	472,245	-	472,245	94%	
	Cross Border Linkages	400,000	287,153	-	287,153	72%	
1	PLANNING FOR VOLUNTARY RETURN	1,900,000	815,320	685,000	1,500,320	43%	79%
	Food Security/Livelihoods	4,300,000	1,389,193	3,611,100	5,000,293	32%	
	Shelter supplies	2,650,000	706,631	1,943,370	2,650,000	27%	
	CBO/CSO sub Grants-Myanmar	40,129,839	31,213,332	19,000,000	50,213,332	78%	
	Job Creation - Stipends	1,100,000	714,189	500,000	1,214,189	65%	
2	FOOD SECURITY & LIVELIHOODS	48,179,839	34,023,344	25,054,470	59,077,814	71%	123%
	Charcoal	93,055,240	62,204,115	37,276,559	99,480,674	67%	
	Food supplies	101,090,703	98,083,373	58,400,787	156,484,160	97%	
	Food Card System Payments	177,575,867	28,596,944	55,927,944	84,524,888	16%	
	Training FCS / Energy Initiatives	500,000	48,150	-	48,150	10%	
	Humanitarian Stipends	7,353,855	3,332,870	3,104,983	6,437,853	45%	
	Emergency Response Myanmar		1,001,000	-	1,001,000	0%	
	Camp Mgmt Support-Supplies	3,544,716	1,869,974	900,000	2,769,974	53%	
	Shelter supplies	14,150,000	14,714,272	-	14,714,272	104%	
	Nutrition	21,733,011	11,637,426	10,281,882	21,919,308	54%	
	Other support	9,400,000	4,494,365	4,407,135	8,901,500	48%	
3	HUMANITARIAN SUPPORT	428,403,393	225,982,489	170,299,290	396,281,779	53%	93%
	Camp Administration (Central & Stipend Workers (Central, Camp & CMPP)	8,252,841	5,241,485	2,085,000	7,326,485	64%	
	Community Empowerment	14,837,067	6,145,736	8,691,330	14,837,066	41%	
	Peacebuilding	1,549,006	-	-	-	0%	
	Capacity Building	500,000	565,689	-	565,689	113%	
		950,000	690,001	402,637	1,092,638	73%	
4	PROTECTION	26,088,914	12,642,911	11,178,967	23,821,878	48%	91%
	Responsible exit-Partners	2,837,436	1,905,100	1,185,666	3,090,766	67%	
	TBC Organizational Resources	98,652,097	50,619,038	50,741,105	101,360,143	51%	
5	RESPONSIBLE EXIT	101,489,533	52,524,138	51,926,771	104,450,909	52%	103%
	Governance	3,075,000	1,354,725	1,100,000	2,454,725	44%	
	Costs of generating funds/ FX Loss	800,000	163,552	636,448	800,000	20%	
	TOTAL TBC EXPENDITURE	609,936,679	327,506,478	260,880,945	588,387,424	54%	96%

Humanitarian Support is TBC largest objective by expense and programming. It contains major food purchases and shelter for Thailand as well as Burma/Myanmar budgeted programming.

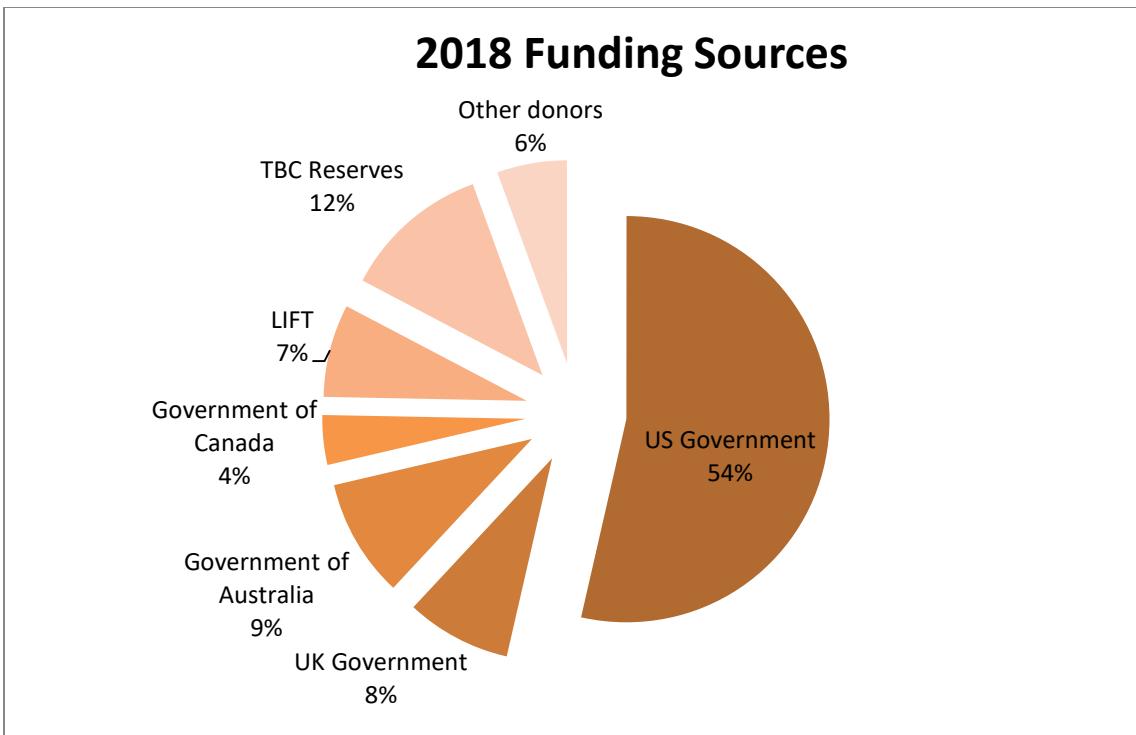
Food Commodity Quantities and Prices 2018					
Item	Budget 2018	Actual Jan-June 2018	Change from Budget June	Forecast July-December 2018	Change from Budget December
Quantities					
Rice (MT)	4,321	4,722	109%	8,584	199%
Fishpaste (MT)	201	227	113%	412	205%
Salt (MT)	52	90	171%	158	302%
Pulses (MT)	421	505	120%	723	172%
Cooking Oil (000 litres)	232	281	121%	509	220%
Fortified flour (MT)	204	255	125%	463	227%
Charcoal (MT)	7,619	4,909	64%	8,700	114%
Price					
Rice	15,232	12,999	85%	13,000	85%
Fishpaste	32,640	30,971	95%	31,000	95%
Salt	7,550	7,265	96%	7,500	99%
Pulses	24,598	17,944	73%	22,800	93%
Cooking Oil	43,938	36,523	83%	36,600	83%
Fortified flour	40,296	38,038	94%	38,100	95%
Charcoal	10,782	12,672	118%	13,000	121%

Commodities show an overall reduction in price but any savings are reduced by the higher price of charcoal, which is TBC's biggest commodity purchase for the needs.

Full Year Projections

Total expenditure is expected to reach 588M for the year, for a 22M savings, most of which is coming from the Humanitarian Support, Planning for Voluntary Return and Protection, despite little movement in population numbers. Additionally, despite staff cuts, we will only have a nominal savings from personnel costs.

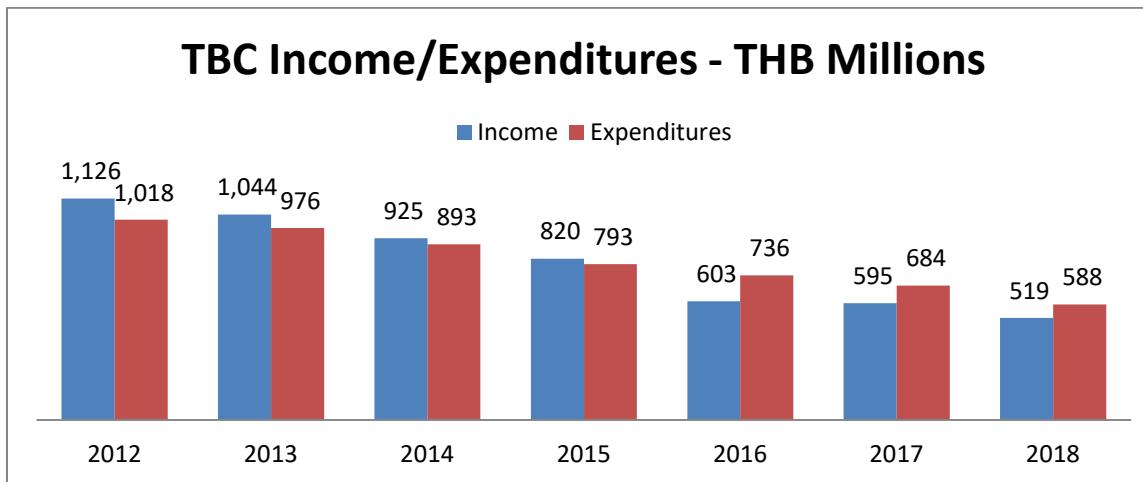
Budget projections counted for a reduction in refugee number to 85,000 but they are currently still around 92,000.



Reserves brought forward from 2017 were 244M, but TBC will have to draw on reserves to meet necessary expenses for 2018, thus further depleting reserves to 174M for FY19 budget. This consists of 50M bookmarked for eventual closing costs and 30M for severance payments to staff, which also increased from the expected 75M budgeted. A balance of 33M remains at TBC disposal.

End of June cash balances are 89M compared to an opening balance of 111M in January. Projected end of year cash balances are 100M

Since 2012 funding has reduced by 50%, but neither the camp populations nor the cost of delivery of programmes are reducing at a similar rate. TBC continues to downsize as an organization, but considers that the current ration levels are at the minimum to maintain a responsible programme. Thus TBC has had to deplete reserves which are not sustainable in the long term.



OUTLOOK 2019

The appetite for return is marginal and unlikely to pick up in the foreseeable future with no trust in the Tatmadaw and little confidence that the government or the EAOs can hold the military to account. With 90,000 people confined to temporary shelters in Thailand and the increasing inability to guarantee ongoing assistance for refugees there is a need for a range of durable solutions. Facilitated voluntary return may be the preferred solution and still needs to be supported, but in this context it may only benefit less than 5% of the population.

The Border Consortium is seeking USD 17M for 2019 to support the communities access to essential services. With the future uncertain and the need to broaden options for return to Burma/Myanmar and integration into Thailand it will require a multi-year flexible commitment of humanitarian support if there is to be a responsible gradual withdrawal of aid to see this through to a sustainable future for refugees.

**TBC would like to thank its Donors and Members for
their generous contributions and support**



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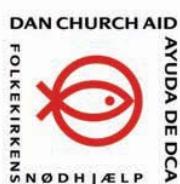


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