



MIDYEAR OVERVIEW

January to June 2025

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CONTEXT

Since the military coup on 1 February 2021, Myanmar has faced an escalating humanitarian and human rights crisis. By the end of June 2025, the State Administration Council (SAC) had killed over 6,840 civilians and detained or imprisoned more than 29,340 human rights defenders. Nationwide, over 3.5 million people are internally displaced, including approximately 1.5 million in southeastern Myanmar. Nearly 20 million people are now in need of some form of humanitarian assistance.

The Myanmar Armed Forces (MAF), facing significant territorial losses, have intensified indiscriminate airstrikes and artillery attacks across the country. These assaults have devastated civilian infrastructure, including hospitals, schools, and places of worship—are war crimes and clear violations of international humanitarian law. Human security continues to deteriorate, particularly in contested areas where heavy fighting and the persistent threat of aerial bombardment have driven mass displacement. Exacerbating these issues, on 28 March 2025, a 7.7 magnitude earthquake struck Myanmar, with its epicentre in Sagaing Region. The disaster caused widespread destruction in Mandalay and other urban centres, killing over 5,300 people. The response was severely hampered by the SAC's ineffective governance and the collapse of public service delivery.

The SAC has announced preparations for national elections, which civil society organisations and ethnic governments have widely condemned as illegitimate and stated their intention to boycott the election. Ongoing offensives by the Karen National Liberation Army (KNLA) along the Thai-Myanmar border have resulted in the SAC losing a significant number of military bases and weakening its territorial control. This fighting has triggered short-term displacement both within Myanmar and into Thailand. Despite these gains, ethnic revolutionary organisations remain unable to protect civilians from aerial bombardment.

Refugee flows into Thailand have continued throughout the first half of 2025. Displaced populations have sought shelter in refugee camps, remote rural communities, and increasingly in urban areas. Concurrently, large-scale flooding has exacerbated the humanitarian situation, compounding the challenges faced by civilians and aid providers.

The humanitarian response has been severely impacted by major funding reductions. On 20 January 2025, U.S. President Donald Trump issued an Executive Order suspending foreign aid for an initial 90-day period. As a result, The Border Consortium (TBC) lost \$2.9 million USD in USAID funding for its Myanmar program, which was initially suspended and subsequently terminated. TBC's Thailand program, funded by the U.S. Bureau of Population, Refugees, and Migration (PRM), experienced a temporary suspension before receiving a humanitarian waiver and full grant payment. Nonetheless, chronic funding shortages have led to reduced food support for the majority of refugees in camps.

Alternative solutions for refugees have also been constrained. On the same day as the aid suspension, President Trump issued an Executive Order halting the United States Refugee Admissions Program, which was the largest third-country resettlement pathway for camp-based refugees. Smaller programs to Australia, Canada, and South Korea are useful for individuals, but remain insufficient in scale to provide whole of community solutions. On 4th June, Myanmar was added to a U.S. travel ban list alongside 11 other countries, further limiting resettlement opportunities.

These restrictions have made self-reliance and access to employment within the Thai economy increasingly vital for refugees. While domestic instability in Thailand has impacted progress toward policy reform that could enable long-term solutions, Thailand remains the most viable option for durable protection and self reliance for refugees.





STRATEGIC DIRECTION #1

Prioritise the Humanitarian Imperative:

Address the humanitarian needs of displaced and conflict-affected communities, with a focus on especially vulnerable people. Provide equitable access for displaced communities to food, shelter and non-food items.

Throughout the former half of 2025, The Border Consortium (TBC) carried out extensive humanitarian operations across Thailand, focusing on both in-camp and out-of-camp refugee populations.

In Thailand, food assistance was provided to 101,622 refugees across the nine camps through TBC's Food Card System. However, due to funding shortages, support for Standard households, which represent over 80% of all households, was reduced in April and May. Although there was a slight increase in June, the level of support remained below that of earlier months. To mitigate the impact of these reductions, TBC worked closely with refugee governance partners to ensure communities were informed and prepared during the transition.

In-camp Shelter Working Groups and teams successfully distributed shelter materials and maintained stockpiles of essential building supplies throughout the reporting period, ensuring continued access to safe and secure housing. Monthly population updates indicated a total of 107,502 refugees across all nine camps, a 1% decrease since the beginning of 2025.

Beyond the camps, TBC continued implementing its Emergency Response Plan to support newly arriving refugees. This included the distribution of essential items such as food, shelter materials, and hygiene kits in Temporary Designated Areas (TDAs). Through collaboration with local partners, TBC extended similar assistance to refugees living outside TDAs, including those concealed among border communities.

In southeastern Myanmar, TBC supported local partners to distribute life-saving aid to over 56,000 civilians affected by atrocities. Unconditional cash transfers equivalent to three months rice were distributed to over 33,600 people and in areas where market access was restricted three months of in-kind food support was provided for over 22,700 internally displaced persons. Basic medical treatment for more than 31,500 civilians was also provided for those in remote areas. TBC also facilitated also distribution of non-food items such as dignity kits for girls and women.

STRATEGIC DIRECTION #2

Reinforce Resilience and Recovery:

Mitigate the longer-term impact of displacement on food security and nutrition. Enhance nutrition, environmental hygiene, climate-smart agriculture, small businesses and access to employment for displaced and conflict-affected communities.

In Thailand, significant efforts to support food security and nutrition continued throughout the reporting period to ensure that the most vulnerable refugees could maintain access to a nutritionally complete food basket each month. The Food Security Post Distribution Monitoring (PDM) also provided critical insights into the status of food security among the refugee population. Findings from the second quarter revealed several downward trends, largely driven by reductions in food support. The proportion of households consuming an acceptable diverse diet decreased by six percent, while instances of moderate to severe hunger rose by four percent. Additionally, the average number of days the Food Card System could support a household each month declined by an average of 5.8 days per month, and household weekly expenditure on food increased by 107 baht.

Despite these challenges, efforts to maintain strong nutritional foundations continued. The Healthy Babies Bright Futures programme sustained its distribution of BabyBRIGHT fortified complementary food to young children, alongside MIYFC education and activities. Each month, caregivers of approximately 2,000 children aged between 6 and 24 months participated in educational sessions focused on best nutritional practices, helping to ensure that children received adequate nourishment during this critical developmental stage.

To help mitigate the impact of funding reductions and to supplement refugee diets, TBC secured new funding sources to distribute agricultural equipment across all nine camps. This included watering cans, pipes, water tanks, gardening tools, vegetable seeds, and fruit tree seedlings, all aimed at increasing the productivity of community and home gardens. The renewed focus on agriculture and local self-reliance has led to greater refugee engagement in home gardening, which not only enhances dietary diversity but also creates opportunities for income generation.

The Savings and Loans Committees continued to provide access to loans for small businesses, supporting over 400 households actively engaged in economic activities within the camps. TBC's Livelihood Committee, in collaboration with refugee partners, promoted refugee-led livelihood initiatives and explored new avenues for support. During the reporting period, an evaluation and assessment of livelihood opportunities was conducted, and the findings will inform program design for the remainder of the year.

In addition to these initiatives, various capacity-building activities helped improve refugees' skills for income generation, including bamboo furniture construction and cement block making. The Community Driven Natural Resource Management (CDNRM) program also continued its efforts to protect the local environment and raise awareness about the importance of environmental conservation, reinforcing the connection between sustainable practices and long-term community resilience.

In southeastern Myanmar, more than 7,800 individuals benefited from sustainable natural resource management initiatives, which included securing land tenure, strengthening community forests and improving watershed management. They also were involved in agricultural extension efforts to further enhance community resilience through the repair of motorbike roads and bridges, the provision of mechanical ploughs to farming collectives, the expansion of irrigation canals and micro-dams, and capacity-building in organic gardening and small-scale animal husbandry. Additionally, ethnic health organizations were supported to improve access to clean water, sanitation, and hygiene services for over 5,100 civilians in conflict-affected areas.

STRATEGIC DIRECTION #3

Promote Protection and Safer Futures:

Reduce the exposure of displaced and conflict-affected communities to harm and mobilise safe and dignified pathways. Defend human rights including access to human security in Myanmar, temporary shelter and work in Thailand and resettlement to third countries.

Discussions in Thailand about potential pathways for refugees to move outside the camps have expanded and taken on a greater urgency. Given that neither resettlement nor return to Myanmar currently offer viable mass options for refugees, legal access to work inside Thailand is the most practical and sustainable path forward. Allowing refugees to work legally would enable them to support their families, contribute to the Thai economy, and become self-reliant, ultimately reducing dependence on an increasingly uncertain humanitarian funding system. Research conducted by TBC in early 2025 revealed that if just one family member of a Standard Household is able to work outside the camp for one week, they can support their household food, which had been covered by TBC's Food Card System, for an entire month. TBC has made considerable progress in these discussions and has taken major steps to strengthen advocacy efforts at both local and national levels. Engagement with a wide range of Thai government stakeholders has been central to this strategy.

Regarding conditions for refugees who have arrived in Thailand since the coup, Thailand's policy remains restrictive and they are formally denied access to the refugee camps. However, progress has been made to enhance humanitarian access and support. New arrivals are directed to officially designated Temporary Designated Areas (TDAs). Within these TDAs, local provincial authorities facilitate the collection and distribution of aid. TBC has been actively engaging with TDAs, which are considered a significant improvement over the previous Temporary Safety Areas, where NGO access was heavily restricted. This policy change is due to a new Standard Operating Procedure (SOP) for refugee assistance that was operationalised in late 2024. However, TDAs are not designed for long-term refugee asylum. They are intended as short-term solutions, with the expectation that inhabitants will quickly return to Myanmar once the conflict is considered to have subsided.

In southeastern Myanmar, strengthened social protection mechanisms directly benefited over 3,500 highly vulnerable individuals. Key safety net interventions included the mobilisation of seed and rice banks, support for nursery schools, civilian protection monitoring, and the promotion of early warning systems through community media. Targeted assistance was also provided to survivors of sexual and gender-based violence. These grassroots efforts were reinforced by strategic advocacy with UN mandate holders, Thai authorities, foreign diplomats, and international civil society actors to help mitigate threats to human security within Myanmar and along the Thai border.

STRATEGIC DIRECTION #4

Strengthen Local Governance:

Diversify representation and enhance accountability in the ownership and oversight of programs and services. Responsibly and transparently manage change in collaboration with refugee and civil society partners, local authorities, donors and other stakeholders.

In Thailand, TBC continued to strengthen refugee-led governance by providing financial, technical, and capacity-building support. This includes funding over 1,600 stipend positions for local partners, reinforcing the leadership of refugee-run bodies such as the Karen Refugee Committee (KRC) and the Karenni Refugee Committee (KnRC). These organisations play a vital role in sustaining their communities, especially amid recent funding disruptions. The empowerment of refugees to govern themselves has proven essential in navigating recent challenges.

TBC provided ongoing training for program staff, camp committees and local partners. Annual sessions cover the Code of Conduct, Prevention of Sexual Exploitation, Abuse, and Harassment (PSEAH), and Child Protection Policies. Additional workshops on gender sensitivity and social inclusion strengthen governance structures and promote safer, more equitable environments. Capacity-building efforts also include practical skills such as office management, communication, fraud prevention, Excel proficiency, and principles of good governance. Localisation remains a cornerstone of TBC's approach across all areas of support.

Effective communication among TBC and camp-based partners has ensured smooth data sharing and operational coordination. Camp Information Teams play a pivotal role in keeping residents informed by sharing updates on camp activities and developments in Myanmar's political and humanitarian landscape. Information was disseminated through film screenings, home visits, and public loudspeaker announcements.

TBC remains committed to supporting diverse future pathways for refugees, including opportunities beyond the camps. The organisation continues to engage actively with local communities and relevant authorities to explore and promote sustainable futures outside of camp settings.

In southeastern Myanmar, 54 emerging leaders participated in a six-month course on Governance and Public Administration, aimed at cultivating inclusive and accountable leadership for future generations. In parallel, over 10,400 community leaders and township administrators were supported with capacity building trainings and to engage with their constituents, facilitating dialogue around pressing needs and concerns. Local partners also received assistance to reinforce critical protection mechanisms, including child safeguarding, prevention of sexual exploitation, abuse and harassment, promotion of gender equality, detection of fraud and corruption, and the establishment of channels for beneficiary feedback and complaints.





FUTURE OVERVIEW

The Myanmar Armed Forces (MAF) are likely to remain the primary perpetrator of violence against civilians through to the end of 2025, necessitating a sustained humanitarian response for both emergency relief and protracted displacement.

Although some ethnic revolutionary organisations have made gains along the border, deeper into southeastern Myanmar, the military has reversed territorial losses and is regaining ground. The surge in troop numbers following the new conscription law, combined with an uptick in drone strikes, has left resistance forces with limited ability to shield communities from aerial attacks, keeping human security dangerously precarious.

Against this backdrop, and amid an overall decline in humanitarian aid funding, it is crucial to expand long-term options for refugees so they can live safely and with dignity, rather than remain dependent on external assistance. TBC will continue to advocate for legal local work opportunities and other durable solutions. While viable policy pathways exist in Thailand, a concerted effort is also needed to provide safety, security, and dignity to conflict-affected populations in southeastern Myanmar.

TBC will further its 2023–2025 strategy throughout the latter half of 2025 and will finish development of its 2026–2028 strategy. The new strategy will prioritise the organisational flexibility required to respond effectively to the diverse humanitarian needs of displaced communities across a range of scenarios, even in a challenging funding environment.

FINANCIAL REVIEW

Financial Summary 2025

| Item in THB (Millions) | Original Budget | Updated Projection | Variance |
|------------------------------|-----------------|--------------------|-------------|
| Income | 1,093 | 361 | -731 |
| Expenses | -1,124 | -603 | -521 |
| Net Movement in Funds | -31 | -242 | -211 |
| Opening Fund Balance | 550 | 550 | |
| Closing Fund Balance | 519 | 308 | -211 |
| Restricted Funds | 450 | 240 | -210 |
| Designated Funds | 34 | 34 | 0 |
| General fund | 35 | 34 | -1 |
| Total fund Balance | 519 | 308 | -211 |
| Balance Sheet: | | | |
| Net Fixed Assets | 1 | 1 | 0 |
| Receivable from Donors | 400 | 250 | 150 |
| (Payable) to Suppliers | -20 | -60 | 40 |
| Bank Balance | 138 | 117 | 21 |
| Net Assets | 519 | 308 | -211 |
| Liquidity | 118 | 57 | |

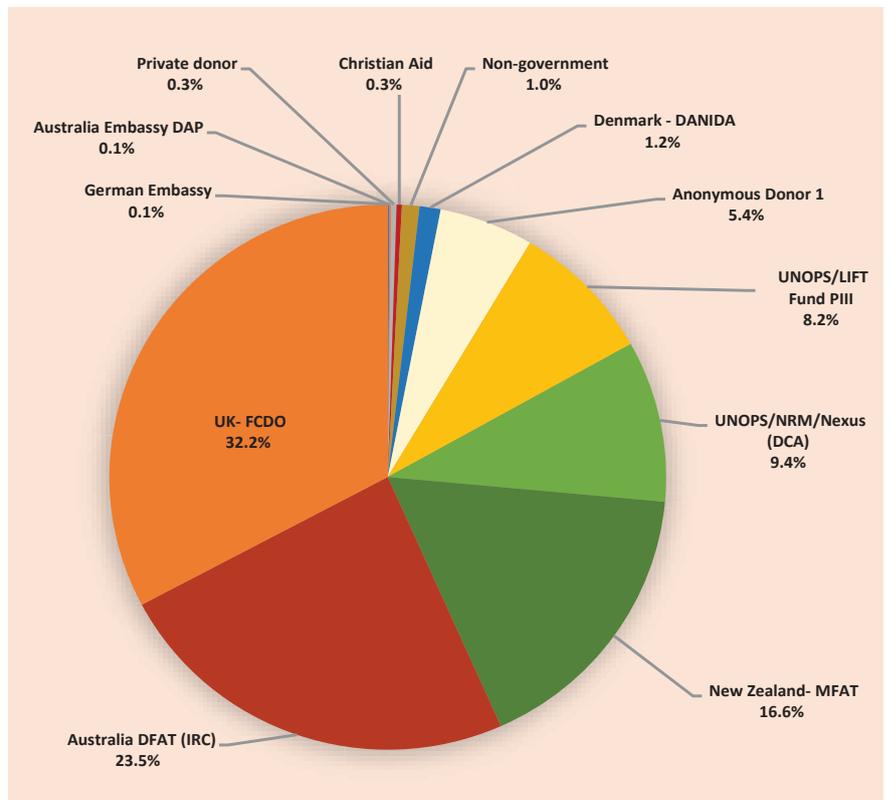
INCOME

TBC has already accrued THB 361M in income, which is equal to 100% of the revised expectation for the year, down from the original projection of THB 1.1B. The reduction reflects the loss of the USAID grant in February, lower contributions from a private donor, and the anticipated termination of the US-PRM grant starting in October.

Government contributions remain the backbone of TBC's financial support, accounting for 98% of the total portfolio. The US-PRM is typically TBC's largest donor, providing essential funding for cash assistance for food and cooking fuel across all nine border camps, as well as bolstering emergency response efforts on both sides of the border. However, due to recent US Executive Orders, funding beyond September 2025 is at risk of ceasing. As of the writing

of this report in August, a two-month No-Cost Extension with an additional USD 87k has been approved, extending the grant until September. A Cost Extension request of more than USD 5M—to maintain rations through December—has been submitted in September and is pending approval.

2025 Income Breakdown (THB 362M/ USD 12M)



A cost extension was signed with UK-FCDO, extending the current agreement through March 2026. This funding constitutes 39% of the overall income portfolio and supports a broad range of TBC programmes in both the refugee camps and Myanmar development initiatives. Additionally, part of this budget supports emergency response activities on both sides of the border.

The third-largest donor in 2025 is Australia-DFAT funding via IRC, which represents 29% of the portfolio. This year marks the final year of the three-year agreement. DFAT's support sustains operations in the nine refugee camps along the border, with a portion dedicated to emergency efforts inside Myanmar. TBC has received verbal commitments for continued support, with a new proposal process expected to begin by the end of Q3 2025.

Other Government funding to support the camp operations comes from Denmark-DANIDA via DCA, MOFA-Japan via PEACE, Polish Embassy, and the German Embassy.

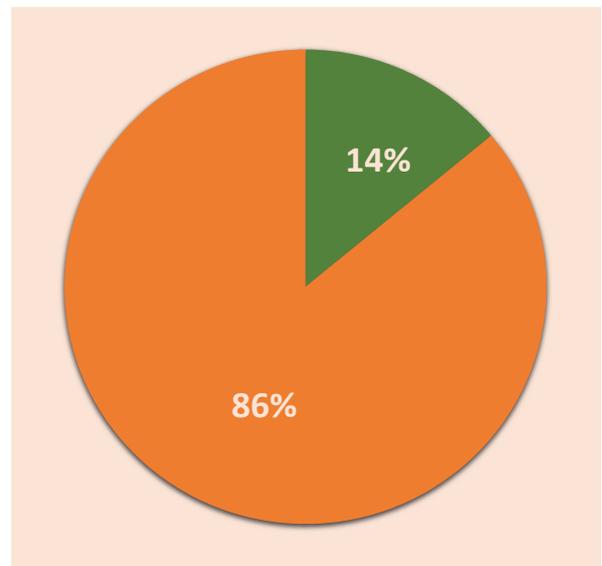
In Myanmar, a new five-year UNOPS-LIFT Phase III agreement was signed in Q3 2024. By contrast, the Community Partners International (CPI) project financed by USAID's LEARN programme was cancelled under the US Executive Orders of 28 February 2025. As a result, TBC was required to adjust previously accrued income from 2024 by THB 54M in 2025.

Long time supporter, Act for Peace, indicated that it's ANCP funding will not continue beyond June this year.

TBC also greatly values the support of non-governmental donors, which together make up 1% of the portfolio. These contributions help sustain Thailand's camp programmes and currently include ICCO, Christian Aid, and one anonymous donor.

Approximately THB 138M has been accrued income to support the emergency response effort. Key contributors to date include Australia-DFAT (30M), New Zealand-MFAT (70M) which signed a new four-year agreement in May 2025 and accounts for 20% of the portfolio, FCDO (21M), and UNOPS-NEXUS via DCA (THB 17M).

Total Income vs ER Income



Expenditure

Expenditure in the first half of 2025 totalled THB 422M, representing 70% of the revised projection of THB 603M. Overall spending is in line with the revised mid-year budget expectations. Where eligible, any unspent balances will be carried forward into 2026.

Of particular note, funding for the Thailand influx emergency is secured through December 2025, thanks to the contribution from Anonymous Donor 1.



Expenditure by Strategic Objectives

| Strategic Objectives | 2025 Mid year budget | 2025 Actuals |
|---|----------------------|--------------------|
| 1 Imperative | 301,000,000 | 242,000,000 |
| Emergency Myanmar | 66,000,000 | 39,000,000 |
| Emergency Thailand | 17,000,000 | 10,000,000 |
| 2. Reinforce Resilience and Recovery | 35,000,000 | 17,000,000 |
| 3. Promote Protection and Safer Futures | 46,000,000 | 24,000,000 |
| 4. Strengthen Local Governance | 42,000,000 | 30,000,000 |
| Organizational Costs | 96,000,000 | 60,000,000 |
| Emergency Thailand | 603,000,000 | 422,000,000 |
| Grand Total USD | 18,272,727 | 12,800,000 |

Highlights:

- Food Card (FC) Rations remain TBC's largest expense, accounting for 36% of the 2025 budget. At the start of the year, planning was based on a refugee camp population of 96,000, but surveys showed the population rose above 110,000 early in the year before decreasing to around 108,000 by mid-year. The US-PRM grant has typically covered the full FC and cooking fuel needs of the camps. However, in its third year, the budget can only finance about 90% of the projected needs and is scheduled to end in September 2025. With the loss of PRM, TBC will continue to provide rations for the most vulnerable households at least through the end of the year, using other available funds.
- Shelter is budgeted for 24M with 89% of that spent. This is mostly financed by FCDO budget and Peace Japan.
- TBC will continue to respond to the emergency response as funds are raised. These funds are typically utilised at a much faster rate compared to the funds used for normal operations and management in the camps.
- Thailand Emergency Response costs totalled 10M by mid-year with most of it financed by an Anonymous Donor 1, FCDO and some from DFAT.
- The Myanmar programme made up approximately 42% of TBC's overall Income compared to 28% last year. The funding supports various types of development activities aimed at bringing as much stability to the communities navigating their lives amidst the ongoing crisis.

All the additional funding to support the emergency fall within the Humanitarian Need Objective. They cover primarily food assistance, natural disasters within the camps, and emergencies caused by the Myanmar crisis.

OTHER FINANCE RELATED NEWS

TBC's audited 2024 Financial Statements and Trustees' Annual Report (TAR) remain pending. The financial statements themselves have been cleared; the delay is due solely to uncertainty around future funding. Finalisation is expected by September 2025. TBC also intends to continue engaging KPMG as its external auditor for 2025.

In response to the loss of major funding, TBC established a Task Force to review financial risks and recommend measures to safeguard operations. One key outcome has been a downsizing plan to reduce staff numbers by the end of 2025, affecting all departments, while maintaining the organization's ability to deliver core services.

FINANCIAL OUTLOOK 2025

TBC will consider the following variables as it plans the operational budget for 2025:

- Refugee population levels: Projections were initially based on 108,000 refugees, but surveys in early 2025 recorded more than 110,000, before decreasing to around 108,000 by mid-year. TBC will continue to monitor population changes closely.
- Food card rations and cooking fuel: These remain the largest expenditure item. With the anticipated conclusion of the US-PRM grant in September, TBC is preparing to reallocate funding from existing donors to continue providing rations for the Most Vulnerable and Vulnerable households at least through the end of the year. A cost-extension request of more than USD 5M has been submitted to PRM and is pending approval. Additional donor support will still be needed to cover the remaining gap.
- Foreign exchange rate fluctuations: Currency movements remain a major factor affecting TBC's budget, given the multi-currency portfolio (USD, THB, GBP, etc.), and will continue to require close monitoring and cash flow management.
- Organisational streamlining: In response to the loss of funding, TBC's Task Force developed a downsizing plan to reduce staff numbers by at least 13 by the end of 2025. This reduction affects all departments.
- Emergency response: TBC will remain flexible and ready to respond to border and in-country emergencies as funding becomes available. In the first half of 2025, approximately THB 138M was mobilised for emergency efforts, highlighting the speed at which such funds are utilized compared to regular camp operations.



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