

FINAL EMERGENCY MARKET MAPPING & ANALYSIS (EMMA) REPORT

Strategic Recommendations for Shelter Upgrade in Response to the Rohingya Humanitarian Crisis

FINDINGS AND RESULTS OF THE EMERGENCY MARKET MAPPING ANALYSIS (EMMA) ON BAMBOO AND TIMBER MARKET CHAINS IN COX'S BAZAR DISTRICT, BANGLADESH

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EXECUTIVE SUMMARY

BACKGROUND

Bangladesh is experiencing one of the worst humanitarian crises in its history due to an unprecedented influx of refugees from Myanmar. As of December 2017, the Inter Sector Coordination Group (ISCG) estimates that 623,969 refugees have arrived in Bangladesh since August 2017. These 623,969 refugees have joined 212,518 that have fled in earlier waves of displacement, for a total refugee population of 836,487¹. In response to the crisis, the humanitarian community developed a Humanitarian Response Plan (HRP). The Government of Bangladesh (GoB) restricted the construction of semi-permanent and permanent structures in both refugee camps and makeshift camps. Poor shelter conditions have further exposed the Rohingya population to risks of floods, cyclones and landslides.

The target of shelter support within the HRP is to meet 100 percent of people's shelter needs. This translates into safe shelter for 949,000 people, or 180,000 households.

The initial stage (called phase 1) of the Rohingya crises involved rapid, mass displacement of populations, during which shelter needs focused on access to adequate shelter for survival and dignity. Various humanitarian actors provided emergency shelter kits (ESK) for essential security and personal safety, protection from the climate and enhanced resistance to disease and ill health. ESK developed by the shelter sector included tarps, rope and bamboo. However, in the initial response, most agencies provided an acute version of these items, which excluded bamboo. In most cases, the refugee families procured some bamboo themselves, or foraged for sticks and timber in the surrounding forest to construct rudimentary makeshift shelters.

¹ [ISCG Report](#), 26/11/2017.



Many refugee families can be seen building their shelters with bamboo in Thangkali camp. Photo by Mahmud Rahman for CRS/Caritas Bangladesh

Given that shelters had already been constructed but were far below standards in terms of living conditions and structural integrity, rather than using bamboo in the emergency kits the sector developed and promoted the shelter *upgrade* kit (USK), or phase 2. This kit consists of tarps, bamboo, fixings, tools and technical assistance with the aim of improving living conditions (with site improvements contributing to the effort) and shelter structural stability to better withstand climatic conditions. Because of the scale of the crisis and the urgency to respond before the monsoon season, the Shelter and NFI Sector decided in November to reorient whatever was already in the pipeline for ESK, toward the USK. The ESK had included four bamboo Borak and 55 Bamboo Mulli, whereas the USK includes four bamboo Borak and 60 bamboo Mulli per household.

MARKET ASSESSMENT

The Shelter and NFI Sector (led by IOM), National Shelter Cluster, IOM, Caritas Bangladesh, CRS, UNHCR, Christian Aid, Save the Children, Handicap International and ECHO conducted a joint-Emergency Market Mapping and Analysis (EMMA) between October 30, 2017 and November 22, 2017. The EMMA sought to answer the following questions:

1. What is the capacity of markets to supply Bamboo/Timber for the Shelter upgrade to 100% of the target population?
2. Is a market-based response appropriate for the Shelter upgrade response?
3. Are there risks associated with market-based response options for Shelter upgrade?

ASSESSMENT RESULTS

As of November 16, 2017—or 2.5 months after the start of massive displacement—only 31% of households targeted had been covered with the bamboo Borak, while materials were in the pipeline for the remaining 24% of the target population and had yet to be distributed. In the same period, 19% households target had received the Bamboo Borak, and 11% had received the Bamboo Mulli with the ESK.

Because the reports of bamboo distributed do not match field observations for meeting the needs of the ESK, and with ESK materials already in the pipeline now being redirected toward USK, it is difficult to estimate the gap for covering 100% of the needs of the USK without double counting what is already distributed or in the pipeline. However, if we plan to meet 100% of the USK needs, 720,000 Bamboo Borak and 10,800,000 Bamboo Mulli are needed.

KEY FINDINGS

- The bamboo supply is available, but it can take an average of 30 days and up to three months to complete bulk order;
- The bamboo demand for emergency shelter (phase 1) is satisfied despite the slow progress on meeting ESK targets, since many refugees personally found and brought back bamboo from nearby forest or markets;
- A big market or demand for timber doesn't exist since the need for emergency shelter is mostly met. Also, the purchasing power of Rohingya refugees is limited due to the restriction of movement enforced by the GoB, and because bamboo Mulli is less costly than timber for families building their own emergency shelters;
- 80% of vendors surveyed sell only bamboo, and 3.49% sell only timber;
- Prices for bamboo Borak have significantly inflated (by more than 24%), while Bamboo Mulli has had limited inflation (+6%) and timber has had almost no inflation (=+1%). However, timber is considerably more expensive (at least three times more than Bamboo Mulli) and less in demand;
- Markets in the area of intervention are poorly integrated;
- 34% of vendors surveyed are opportunistic, 96.51% of vendors surveyed have mobile phones and 38.37% accept mobile phone payments;
- Severe deforestation is happening at regional and local levels to satisfy demand within the mega camp of Kuthapalong and Balukhali: the equivalent of enough trees to cover the surface of 1,000 soccer fields are needed every year for firewood.

RECOMMENDED RESPONSE

Recommendations for shelter upgrades for 180,000 households before the pre-monsoon season in April 2018 include the following:

1. **Redirect on-going in-kind ESK distributions toward Shelter upgrades** (except for new arrivals) and change 4W reporting (a report of Who, What, Where, When) for dynamic reporting to better measure progress to target. The 4W approach is a critical element to help coordination of relief efforts during any humanitarian crisis. Such information can



50,000 bamboos transported by river to feed Rohingya refugee camp demand, Alikadom, Bangladesh, November 15, 2017

- help to alleviate duplications, identify possible gaps, better inform decision makers, and allow everyone to ask better questions;
2. For in-kind distributions planned but not yet purchased, **switch from local to regional/international purchases with treated bamboo** to decrease pressure on local and regional forests, while at the same time increasing the shelter longevity.
3. Because of delays with delivery, poor market integration, and diversity of family needs, **organize e-voucher shelter fairs** at the border of camps so that refugees can more easily access USK materials. Shelter fairs should last multiple days or even weeks due to the cost of set up and the continuous influx of refugees. The use of electronic voucher would facilitate purchases at this scale, and allow for the inclusion of cash voucher options when needed, using the same pipeline.
4. **Distribute complementary, targeted, one-off, conditional cash for shelter upgrades, or unconditional cash for the extremely vulnerable.** These cash distributions would help extremely vulnerable families or individuals to cover part of the transport and labor costs that are often needed to access humanitarian assistance (especially given the size and rugged terrain of the camps). If conditional cash is preferred by humanitarian organizations, cost-effectiveness should be compared with the impact of unconditional one-off cash distributions for most successfully reaching the shelter upgrade objectives;

5. Improve market integration, acceptance with the local population, and people's purchasing power through **Cash for Work (CfW) activities to build market roads and market places** within the camps in priority, and then outside the camps. Before implementation of CfW, humanitarian actors should harmonize daily labor rates, and conduct a quick labor analysis to identify local skills and available labor. For a Shelter phase 3, consider doing a Value Chain Analysis (VCA) of construction labor as it requires more skilled labor.
6. In collaboration with GoB, **support local forestry programs** to improve forest renewal and protection, and improve income generating activities among members of the host community who are more affected by the influx and presence of the Rohingya refugees;
7. Provide **shelter upgrades and site planning technical assistance** to meet SPHERE minimum and Building Back Better Standards (BBBS), as well as **technical assistance and pilots for alternative and sustainable sources to bamboo for the shelter upgrades** (such as multi-story shelter made of timber piloted by CRS);
8. **Monitor and provide shelter material price information** in a limited number of markets. We recommend adapting the MarkIT methodology² and monitoring bi-weekly the critical shelter

material prices in: two markets per area of intervention (per camps), two control market outside each area of intervention, and one regional market (Chittagong).

9. **Advocate for the recognition of freedom of movement as a human right, with the objective of better market integration** benefitting both the host community and refugee populations. If it's not possible to negotiate freedom of movement in the whole country, as per Refugee Conventions and Protocols, the humanitarian community should **negotiate provisory solutions to ease movement, such as pushing military cordon further to allow full freedom of movement to Rohingya refugees in the Cox's Bazar District**. This would allow refugee to access shelter material and other commodities beyond the camps, such as in the Ukhya market, while still providing the GoB the benefit of controlling Rohingya circulation.
10. **Pilot conditional community grants for community infrastructure** or **"for vulnerable individuals who are not benefiting from the humanitarian programs**. Such infrastructure support could include safe havens for vulnerable women, repair or upgrade of latrines, or community income generating infrastructure, like a bamboo treatment center or small business nursery.

² <https://www.crs.org/our-work-overseas/research-publications/markit>