

SOCIOECONOMIC  
ASSESSMENT OF  
REFUGEES AND HOST  
COMMUNITIES  
IN THE  
**REPUBLIC  
OF  
MOLDOVA**



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Larisa is a refugee who lives in Moldova since 2022. She is retired and came from Kiev with her husband after the full-scale invasion of Ukraine.

# Introduction

As of the end of June 2025, the Republic of Moldova hosts approximately 132,000 refugees from Ukraine, constituting around 4 percent of the national population. The refugee population consists predominantly of women (58 percent) and children (41 percent). While most refugees are largely settled in urban areas such as Chisinau, Balti, and Cahul, a notable proportion also reside in rural regions. Moldova has committed to progressively integrating refugees into its socioeconomic systems under the pledges made at the Global Refugee Forum (GRF). These commitments align with national frameworks, including the National Development Strategy Moldova 2030 and the Program for Managing Migration Flows, Asylum, and Integration of Foreigners 2022-2025.

The assessment is a comprehensive exercise designed to gather detailed information on the socioeconomic profiles of refugees and host community members, their use of public services and barriers to access, their interests and intentions regarding economic participation, and levels of social inclusion and social cohesion. The assessment employs a mixed-methods approach combining several data collection and analysis tools to address the research questions outlined in Annex 1. The overall exercise includes a quantitative survey conducted with refugees and host community members, complemented by micronarratives and key informant interviews. This report focuses on the findings from the quantitative data collection conducted between June and September 2024.<sup>1</sup>

The report provides a detailed analysis of the assessment findings and serves as a resource for professionals working in data analysis, information management, and monitoring and evaluation and learning (MEAL) roles. The data generated through this exercise has already directly informed key strategic planning processes, including serving as primary evidence base for the needs analysis in the Refugee Response Plan (RRP) 2025-2026. The findings have also supported the Inclusion and Solutions Working Group in shaping the transition agenda and advancing the economic inclusion agenda for refugees in the Republic of Moldova. Building on this evidence base, two policy briefs have been developed to reach a wider audience. These briefs synthesize the key challenges identified and present targeted recommendations aligned with existing legislative and policy frameworks.

[1] The clean data and analysis tables can be accessed through UNHCR's Microdata Library - <https://microdata.unhcr.org/index.php/catalog/1393>

# Methodology

The sampling design was developed through a staged approach, beginning with a pilot exercise involving systematic enumeration of selected Primary Sampling Units (PSUs), followed by adjustments to the sampling strategy based on the pilot stage results. The initial survey design envisaged systematic random sampling using a two-stage approach: enumeration in the first stage and random selection of households (HHs) in the second stage. Based on existing data on refugee presence in Moldova, it was assumed that in certain enumeration areas—particularly densely populated neighbourhoods—the ratio of refugees to the local population would be broadly consistent with the distribution observed at the administrative level 1.<sup>2</sup>

However, the pilot enumeration showed that, contrary to expectations, the number of refugees was significantly lower than expected. Two possible explanations emerged from the enumeration exercise:

- Either existing data sources do not accurately reflect the de facto residential locations of refugees in Moldova; or
- Only more granular information about their density could result in a workable enumeration design (assuming that refugees may be concentrated in specific locations that could only be identified through more geographically disaggregated data).

In practice, only 14 HHs hosting Ukrainian refugees were identified among the 1,527 enumerated HHs. At this rate, a full-scale survey aiming to interview 800 to 900 refugee HHs would have required the enumeration of about 100K HHs. As a result, a list-based sampling approach was adopted to maintain a representative survey design. The key resource for the listing is the UNHCR proGres database, which contained addresses of approximately 36,000 individuals or 17,000 HHs. The 36,000 individuals included in the UNHCR proGres database represent a specific subset of the broader refugee population, defined primarily by their engagement with assistance programmes.

[2] In order to build the sampling frame, data from various sources were utilized: for the local population, findings from the 2014 Census were used as the baseline, while for refugee data, data from the Border Police, the General Inspectorate for Migration, and UNHCR's proGres database were used.

These individuals had been verified as present in Moldova and were eligible for assistance based on specific vulnerability criteria. In contrast, refugees not captured in this system typically include those who did not request assistance or who were more transient, and who therefore remain less visibly within humanitarian data systems. However, at the time of data collection, the proGres dataset provided the only reliable source of geolocated address-level information. Furthermore, as this group consists predominantly of individuals holding Temporary Protection (TP) status, it represents the stable, resident population most relevant for long-term policy planning and integration efforts.

Based on this list, the final sampling frame for the main survey was identified through several steps:



Exclusion of respondents who live in the Transnistrian region and could only be accessed by on-site enumeration.



Stratification by region, namely North, Center, South, and Chisinau.



Geocoding of addresses, grouped into geographical clusters based on the proximity of addresses, with clusters capped at a maximum of 80 HHs.



The final sampling frame consisted of 1,350 interviews, including 900 refugee HHs and 450 HHs from the host community. Within each PSU, between six to eight refugee interviews were conducted, followed by three to four interviews with host community members.

For the purposes of this exercise, host community respondents were identified as Moldovan citizens living in close proximity ('next door') to the selected Ukrainian refugees (typically every second interview conducted).

Region	# of interviews with refugees	# of interviews with host community members
Center	47	23
Mun. Chisinau	628	314
North	146	73
South	84	42

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The study's findings are statistically representative of the general population used as the basis for this exercise, derived from the UNHCR proGres database, with a 95 percent confidence level and a 5 percent margin of error. While these results provide generalizable insights into this cohort, they are less indicative of refugees who are transient who are not captured within this framework. Regarding the host community, the findings are representative of Moldovan citizens residing in areas specifically affected by refugee presence, thereby reflecting the socioeconomic reality of citizens living in close proximity to refugee HHs.

The survey tool was developed in coordination with the National Bureau of Statistics to ensure comparability with national data. It incorporates modules from the Household Budget Survey (Chapters 1, 6, 7) and the Labor Force Survey (questions 13, 15–20, 23, 26–27, 34–35, and 52–56). The methodology was validated during a public consultation process involving the Ministry of Labor and Social Protection, the Ministry of Interior, the National Employment Agency, the Ministry of Education, the Ministry of Health, and the National Bureau of Statistics.

# Demographic profiles

## Household composition

Women make up a major proportion of the refugee population, accounting for 84 percent in this group. Nearly all refugees hold Ukrainian citizenship (96 percent) and are predominantly from southern Ukraine, with half originating from the Odesa region. On average, refugee HHs comprise 2.5 individuals. Just over half (52 percent) include at least one child, and 37 percent include at least one older adult. Notably, three-quarters of refugees have been residing in Moldova for over a year, and the average duration of displacement is 22 months.



### Average HH Size

Refugees: 2.5

Hosts: 2.4



### HHs with children\*

Refugees: 52%

Hosts: 34%

\*0 to 17 years



### Average HH Size\*\*

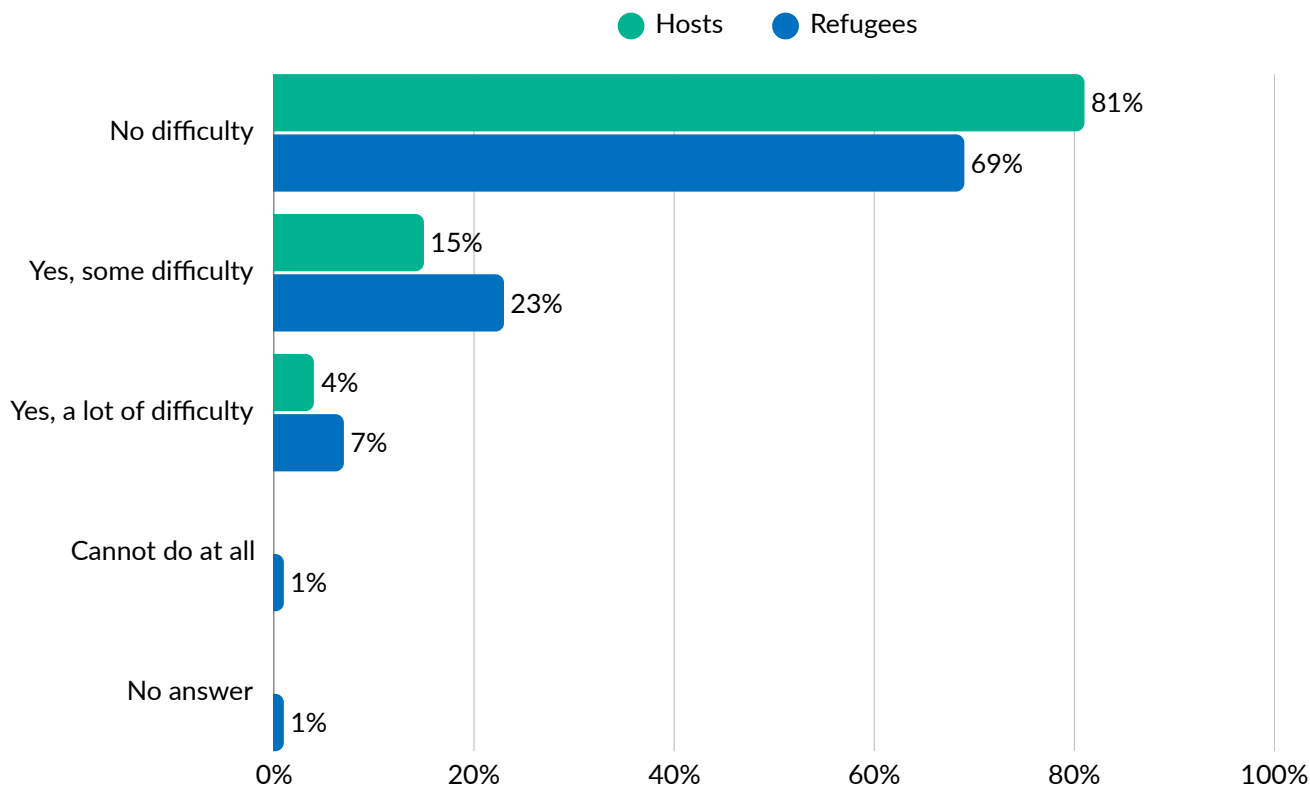
Refugees: 37%

Hosts: 43%

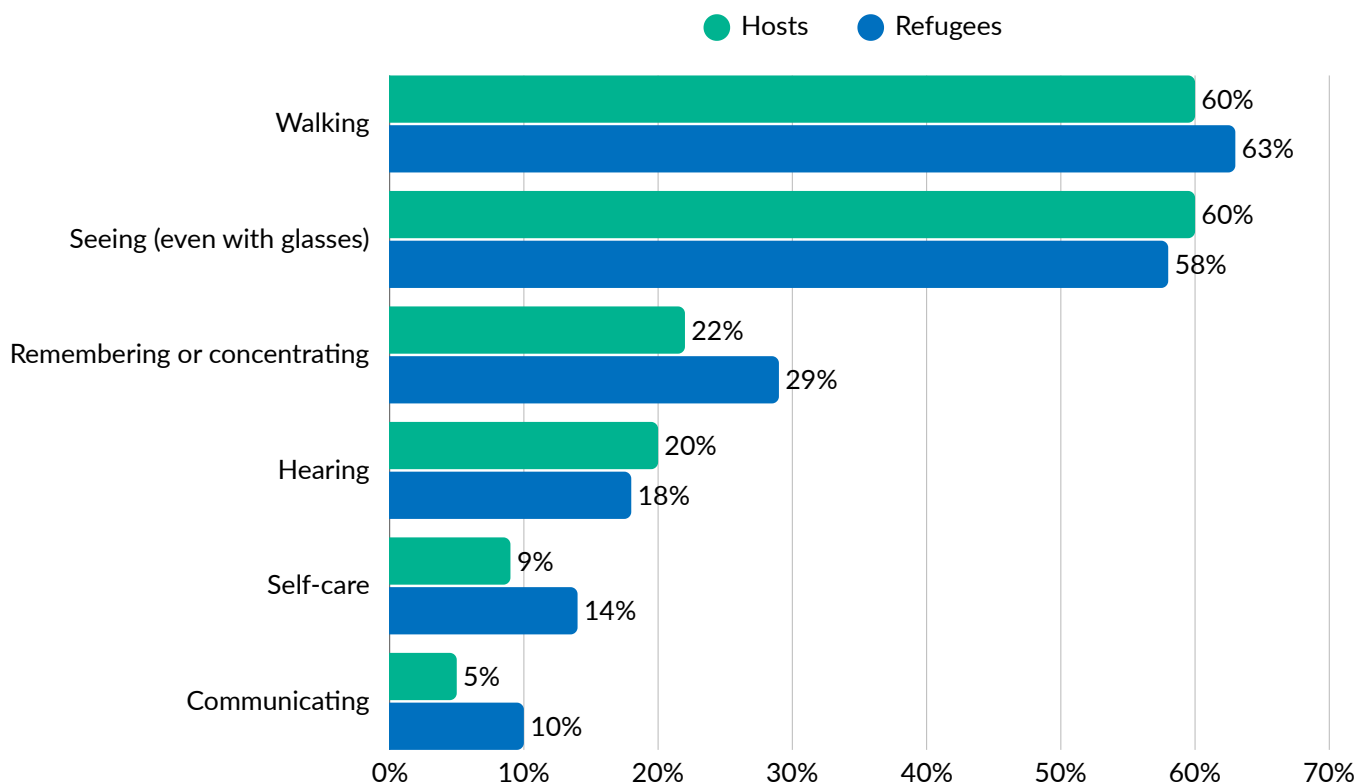
\*\*60+ years

By comparison, women make up 73 percent of host community HHs in the survey sample, considerably higher than the official national average of 52 percent. This difference demonstrates the importance of the matched sampling approach used to compare refugee HHs with neighbouring host HHs. All host respondents hold Moldovan citizenship and are predominantly of Moldovan ethnic origin. Host HH composition is broadly similar to that of refugees, comprising 2.4 individuals on average, with 34 percent of HHs with at least one child and 43 percent with at least one older member.

### Disability within the Household (out of households with several members)



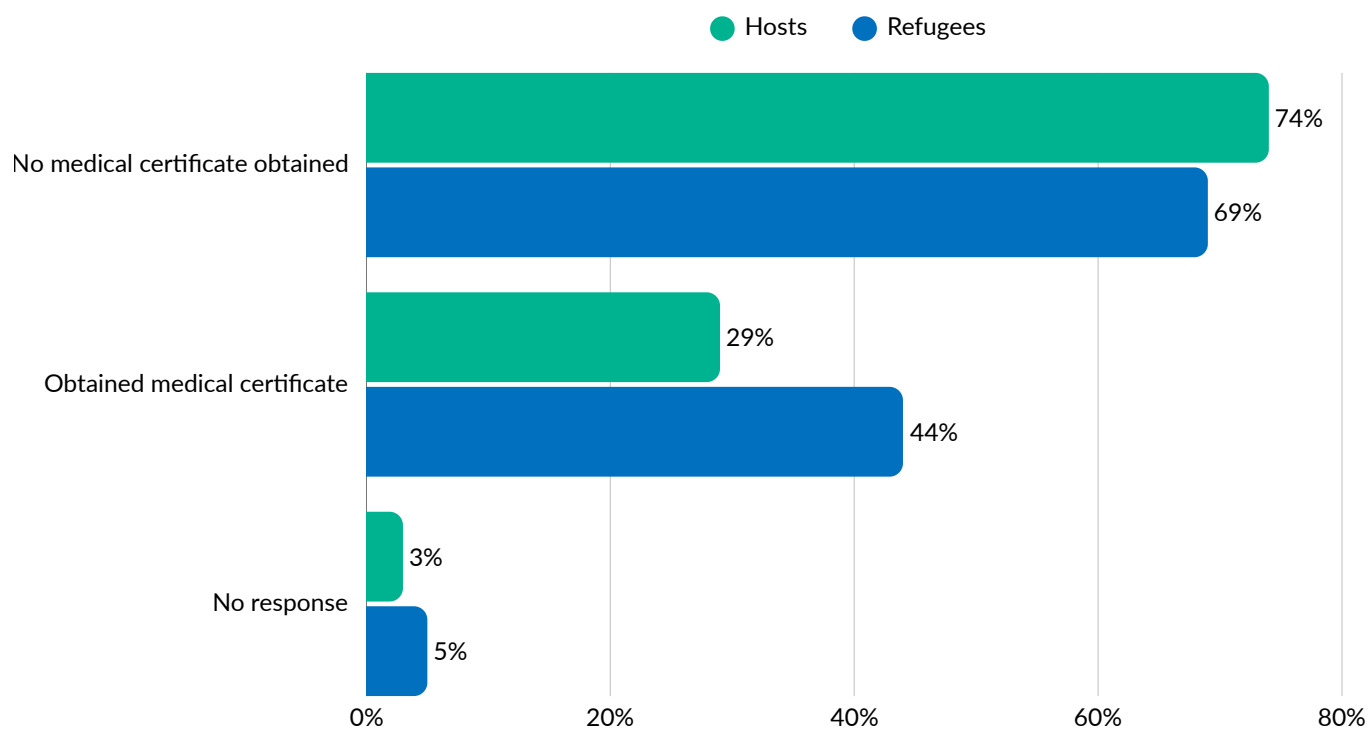
### Type of difficulty (out of those reporting difficulty)



However, refugee HHs are more likely than host HHs to include a member with a disability (24 percent versus 11 percent). Across both groups, the most commonly reported disability relates to sight (particularly among hosts), followed by walking difficulties (particularly among refugees). Overall, 43 percent of disabilities are medically certified, most often in Ukraine among refugees (33 percent), and in Moldova among hosts (39 percent).

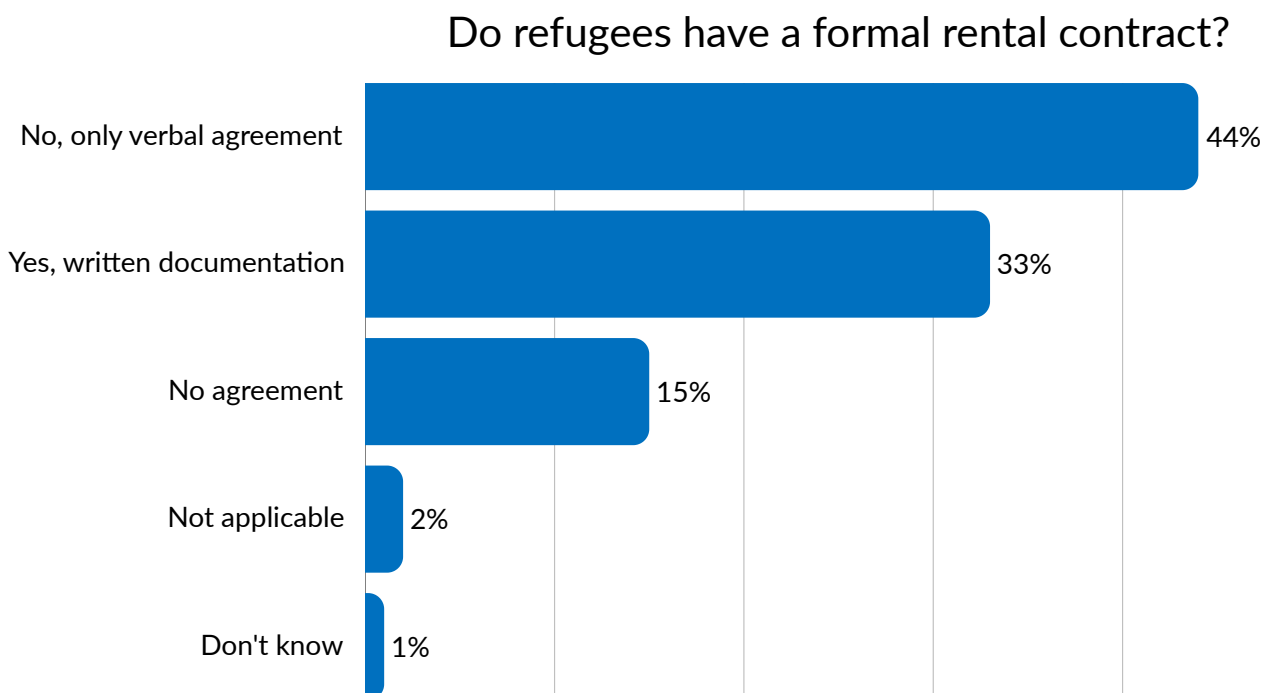
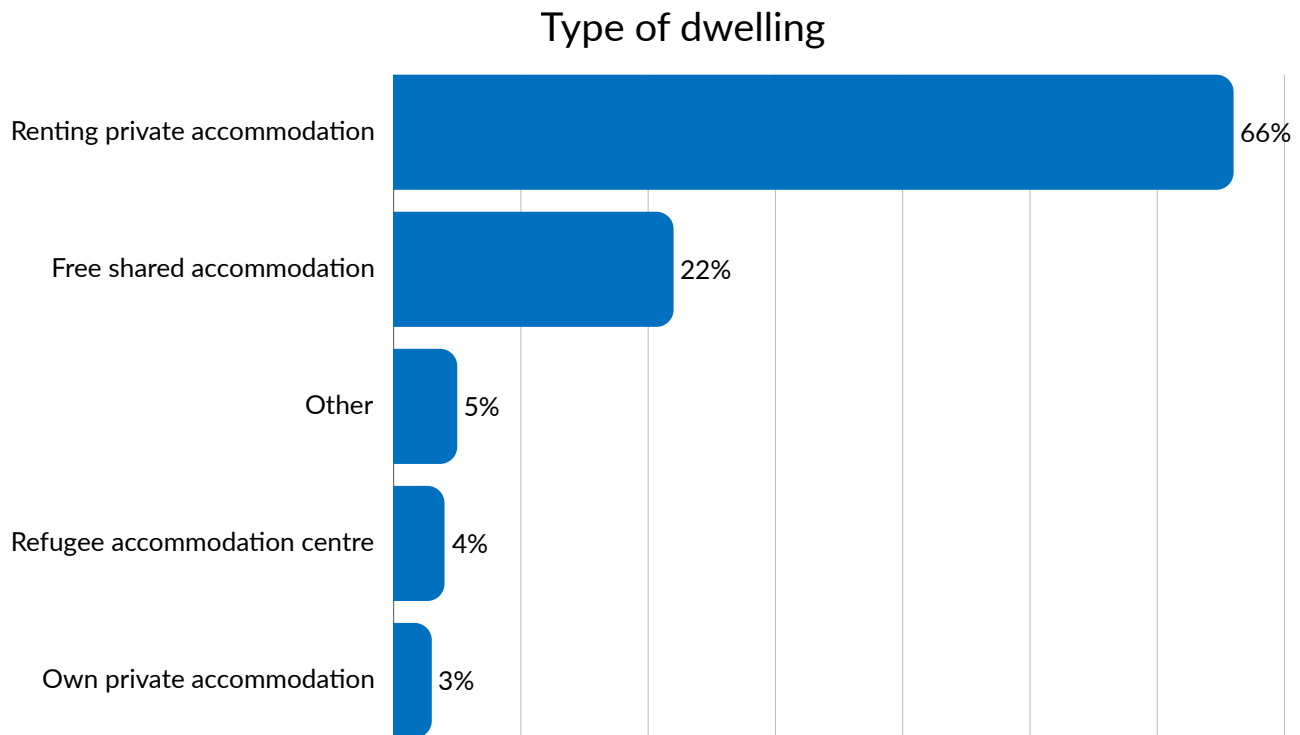
## Medical certification of disability

(out of those reporting difficulty)



## Accommodation

The analysis of living conditions shows that most refugees live in private rented accommodation (66 percent). A further 22 percent live in free shared accommodation, with more than two in five in this group (44 percent) relying solely on a verbal rental agreement.



The average living space available to refugees is approximately 25 square metres (m<sup>2</sup>) per person, with only 4 percent of refugee households living in a space less than 6m<sup>2</sup> per person. Refugees generally have access to essential amenities such as fridges, the internet, and indoor plumbing. Nine in ten use gas in their current dwelling, and almost all refugee HHs have a fridge and a heating system. More than nine in ten refugee HHs also have access to a bath or shower in their current dwelling (94 percent) and to an internet connection, a flush toilet, and a washing machine (92 percent each).

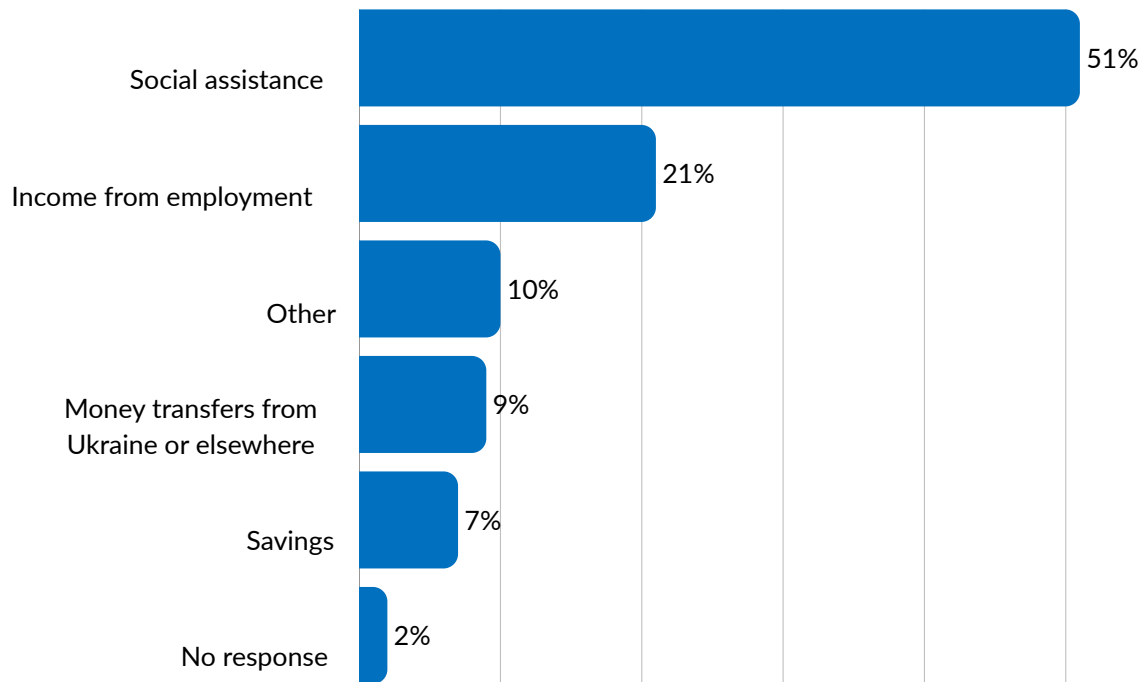
Despite having widespread access to a range of amenities, many refugee HHs experience issues within their dwelling. Around 21 percent report dampness and over one in ten report rotten window frames, doors, or floors (14 percent) or leaks (11 percent).

Nearly half of refugee HHs pay no more than 3,750 Moldovan leu (MDL) monthly (46 percent), and a further 22 percent pay between 3,751 MDL and 5,625 MDL. Nevertheless, 27 percent report difficulties in covering rental expenses, compared with one-third who can fully or mostly cover their rent.

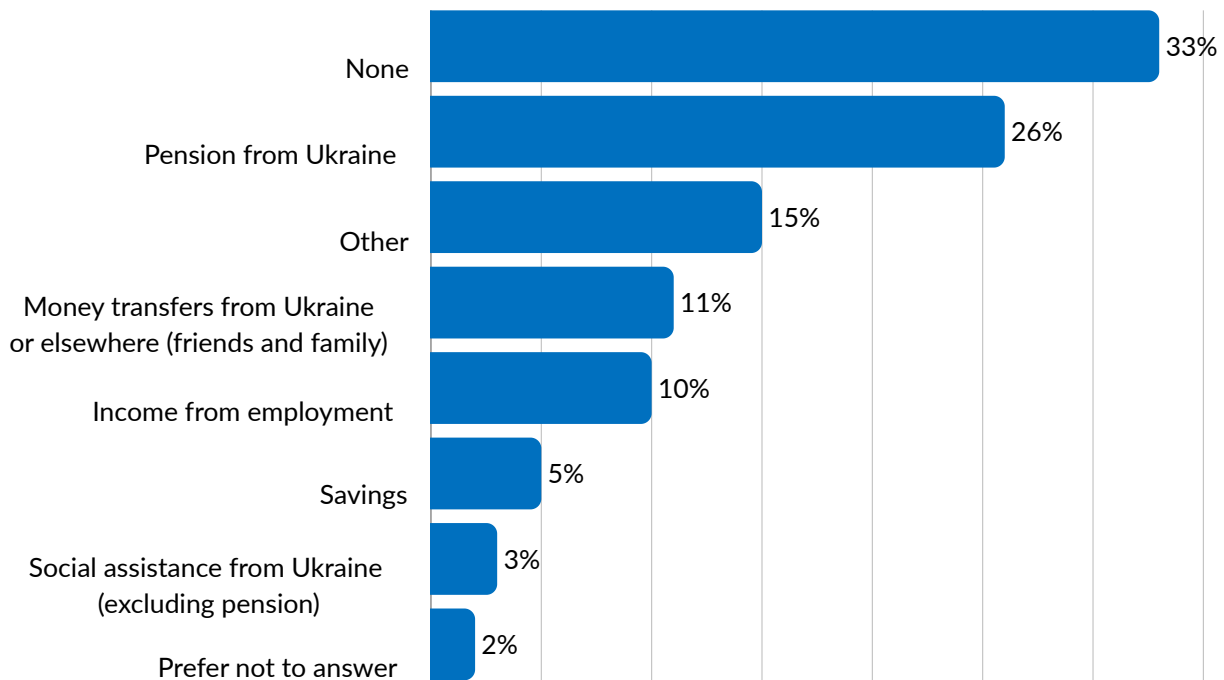
## Income and living standards

The main source of income reported by refugee respondents is social assistance (51 percent), far exceeding income from employment (21 percent). While one-third of refugees report having only one source of income, one in four (26 percent) receive a pension from Ukraine as a secondary source of income, which is used to meet basic HH needs. Around 13 percent of refugee HHs also receive money from relatives living abroad on a regular basis, compared with 10 percent of host HHs. On average, refugees who receive money from abroad receive close to 7,100 MDL each month, compared with less than 5,200 MDL among hosts.

## Refugees household's primary source of income



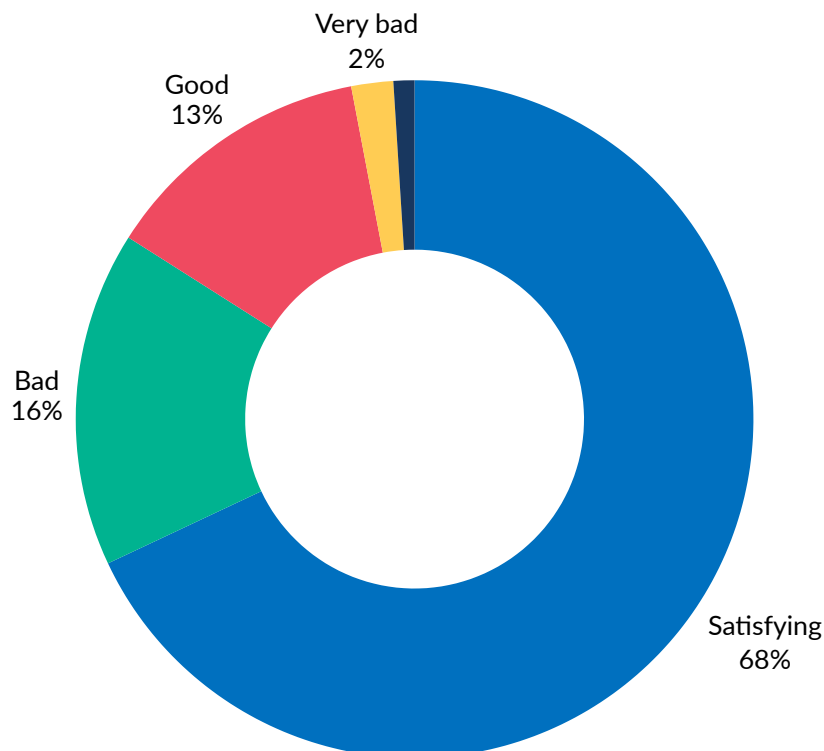
## Refugees household's secondary source of income



Two-thirds of refugee HHs describe their standard of living as “satisfactory” (68 percent), while around one in five (18 percent) consider it bad. Refugees are more likely to report experiencing financial difficulties than their host counterparts, with 56 percent of refugee HHs indicating they have experienced financial hardship over the past 12 months compared with 46 percent of neighbouring host HHs.

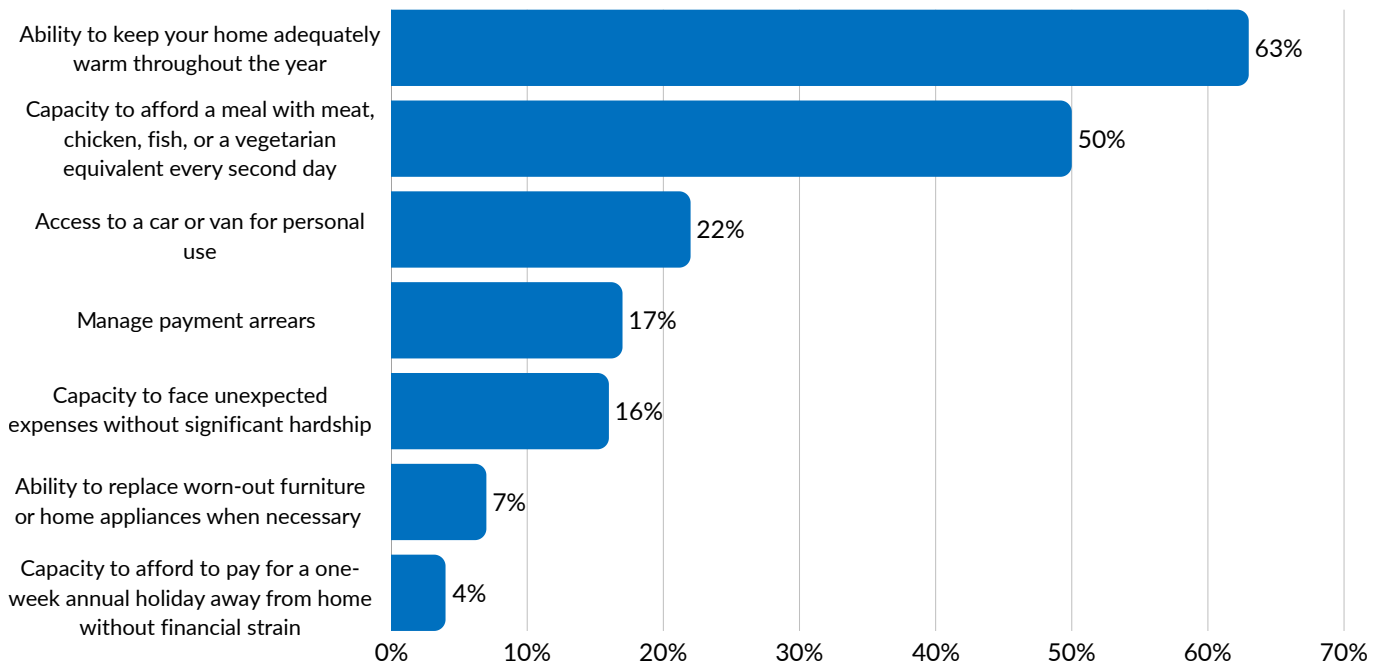
Looking at indicators of household financial comfort, just 7 percent of refugees have the ability to replace worn-out furniture or home appliances, and only 4 percent have the capacity to afford to pay for a one-week annual holiday away from home without financial strain.<sup>3</sup> Refugee households are also twice as likely as hosts to say they have had difficulty paying utilities in the past 12 months (54 percent versus 45 percent). Almost the entire refugee population (99 percent) reported experiencing at least one of the financial difficulties.

### Refugees perception of their standard of living of the household

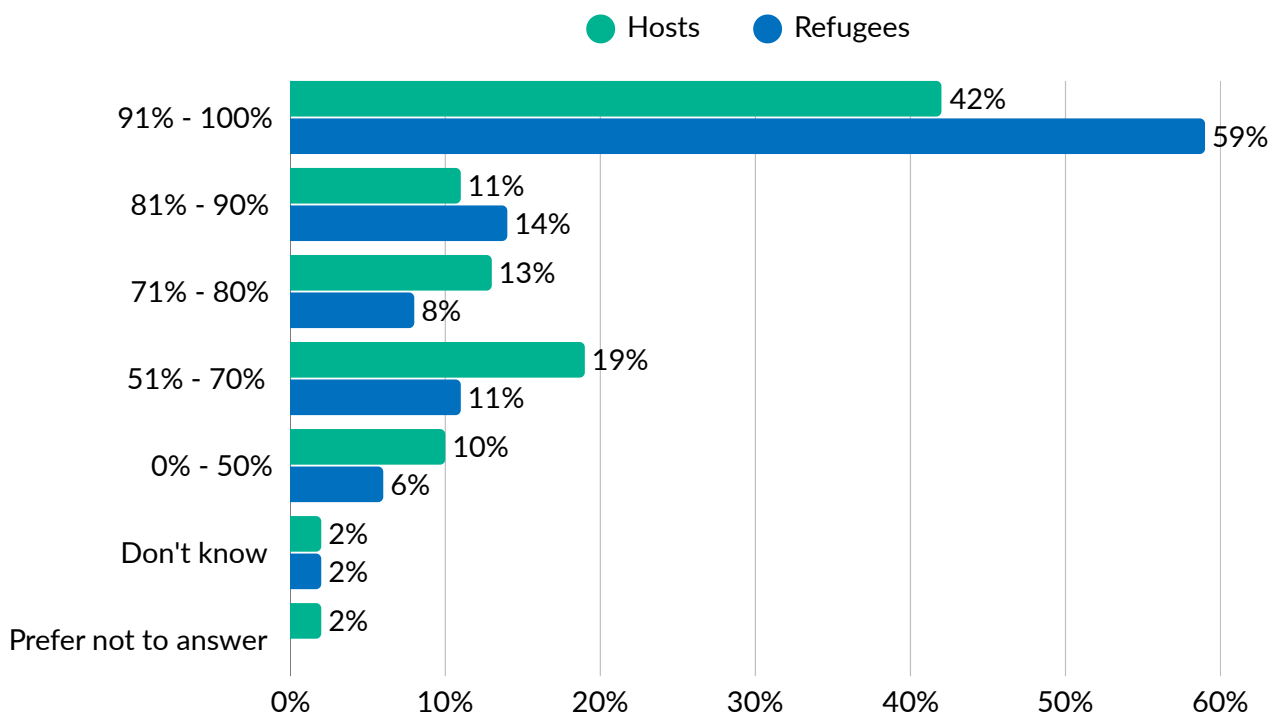


[3] This question was exclusively asked to refugees, so it does not allow for comparison with neighbouring hosts.

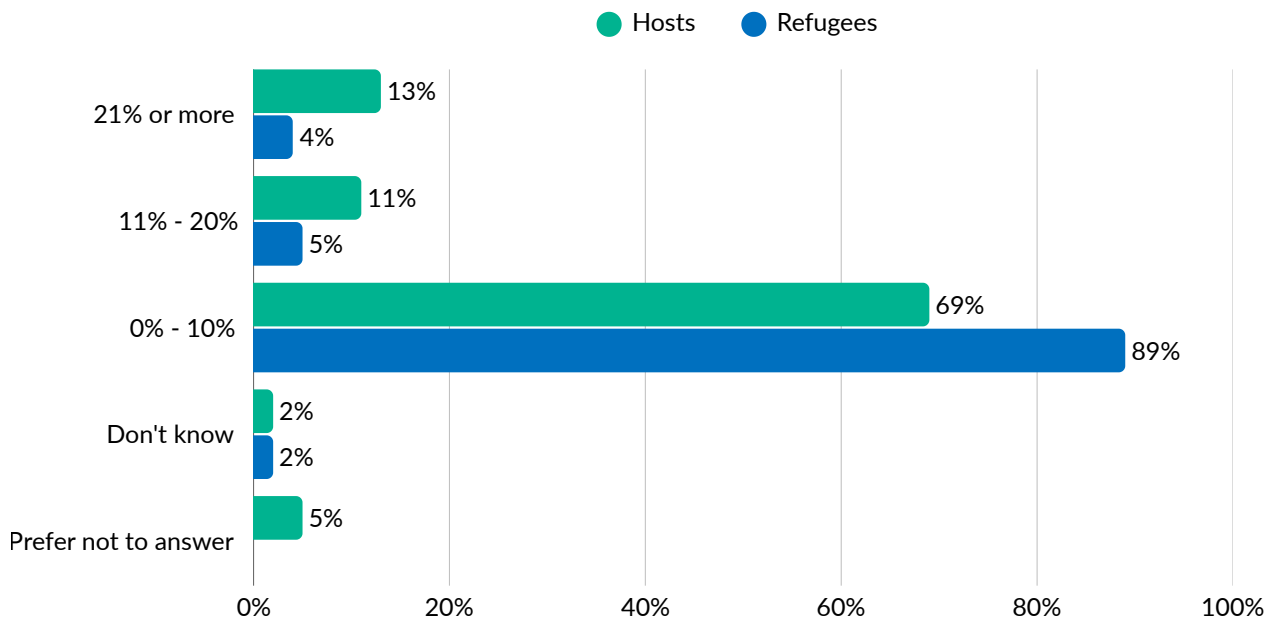
### Refugee household capacities



### Share of household income spent on daily subsistence



## Share of household income saved\*



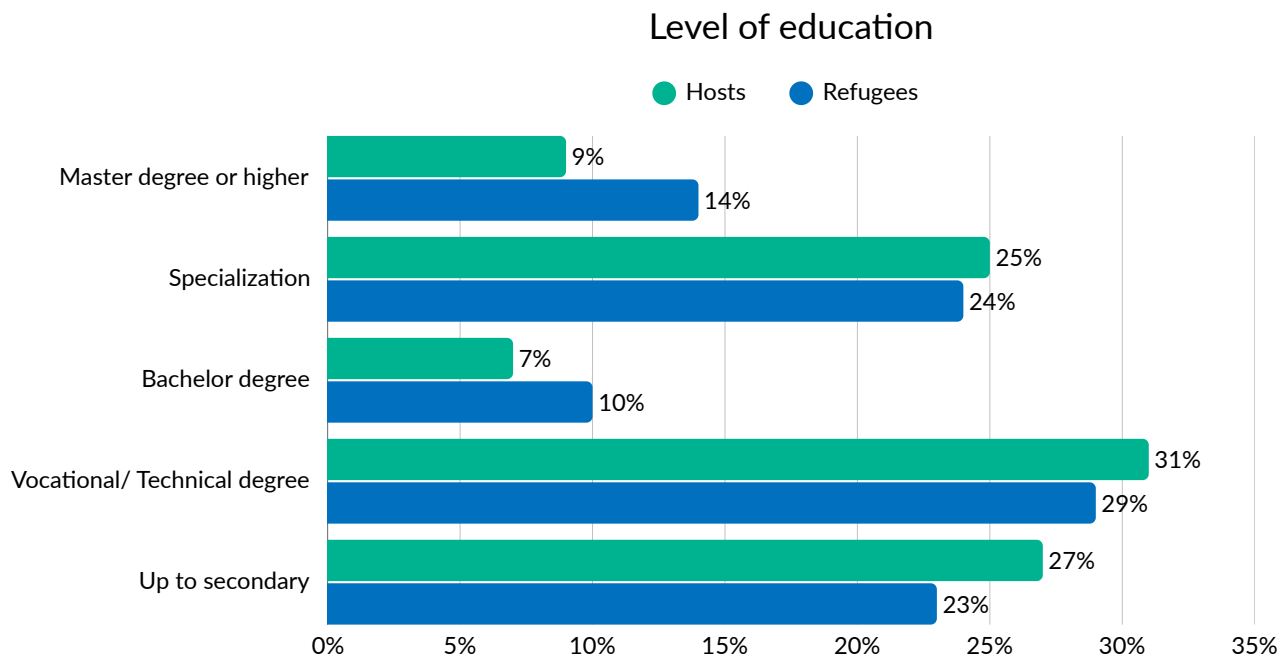
\*Among respondents currently employed, self-employed, doing an apprenticeship/internship/volunteering, or running a business

Consistent with this, refugees are more likely than hosts to report spending more than 90 percent of their household income on daily subsistence needs (59 percent versus 42 percent). They are also more likely than hosts to report saying that no more than 10 percent of their HH income is saved (89 percent of those who are working versus 69 percent of working hosts).

Reflecting these higher financial pressures, refugees report lower expectations than hosts in terms of necessary income to afford decent living conditions. On average, refugees consider that around 17,000 MDL per month would be sufficient for decent living conditions, and that 9,850 MDL would be enough to meet minimum day-to-day HH needs. By comparison, hosts estimate that around 20,750 MDL per month is needed for decent living conditions and 12,800 MDL per month to meet minimum HH needs. Looking at how this has evolved over time, around half of both refugees and hosts report that their living standards are unchanged compared with 12 months ago (45 percent and 56 percent, respectively, among refugees and hosts). However, refugees are more likely than hosts to report that their HH has a lower standard of living than 12 months ago (45 percent versus 33 percent).

This indicates a significant gap in financial inclusion which may affect HHS' abilities to manage finances, receive assistance, and participate in the Moldovan economy. It also suggests that they experience wider barriers to economic inclusion, including language difficulties when looking for a job (45 percent), illness or disability affecting ability to work (22 percent), and the need to take care of other family members (10 percent).

## Educational attainment



Ukrainian refugees generally report higher educational attainment than host community members. Over one in ten refugees (14 percent) hold a Master's degree, and one in ten hold a Bachelor's degree (10 percent), compared with fewer than one in ten host respondents holding equivalent qualifications (9 percent with a Master's degree or higher and 7 percent with a Bachelor's degree). Close to one in three refugees hold a vocational or technical degree (31 percent) compared to 29 percent of host community members.

# Social Inclusion of Refugees

The social inclusion of Ukrainian refugees in Moldova is characterized by both challenges and opportunities, particularly in relation to social networks, community participation, and communication.



Host attitudes towards refugee integration are generally positive. Around nine in ten hosts agree that refugees should be able to live in the same locality (90 percent), be their neighbour (89 percent), or have children in the same classrooms as Moldovan children (87 percent).

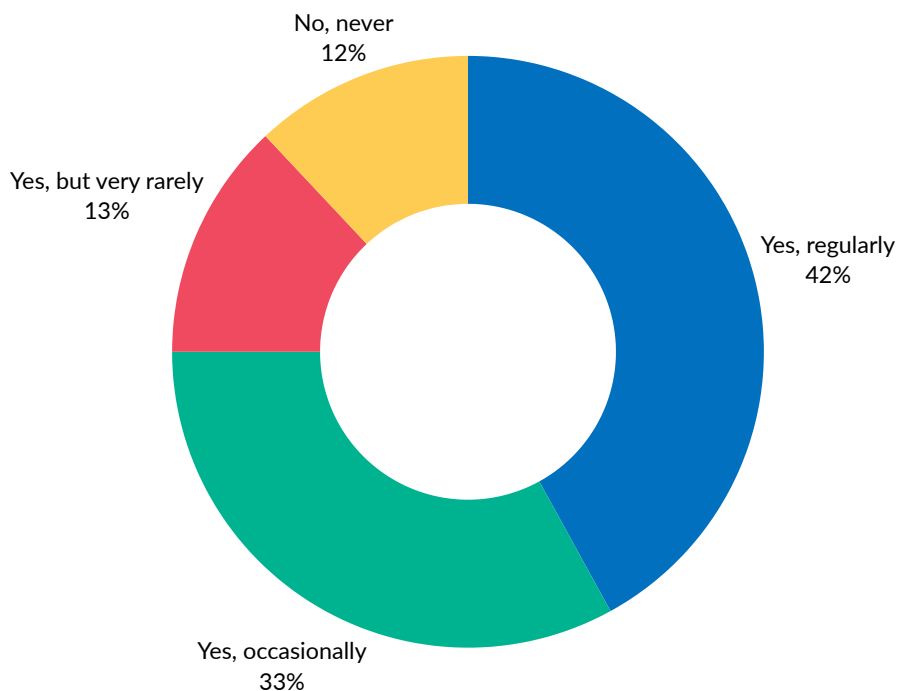
Nevertheless, support is lower when considering long-term integration, with just three in four hosts believing that

Ukrainian refugees should be able to stay in Moldova in the longer-term (76 percent) and three in five saying refugees should be able to be part of their family (59 percent). Fewer than half say that a Ukrainian refugee could be their employer (49 percent).

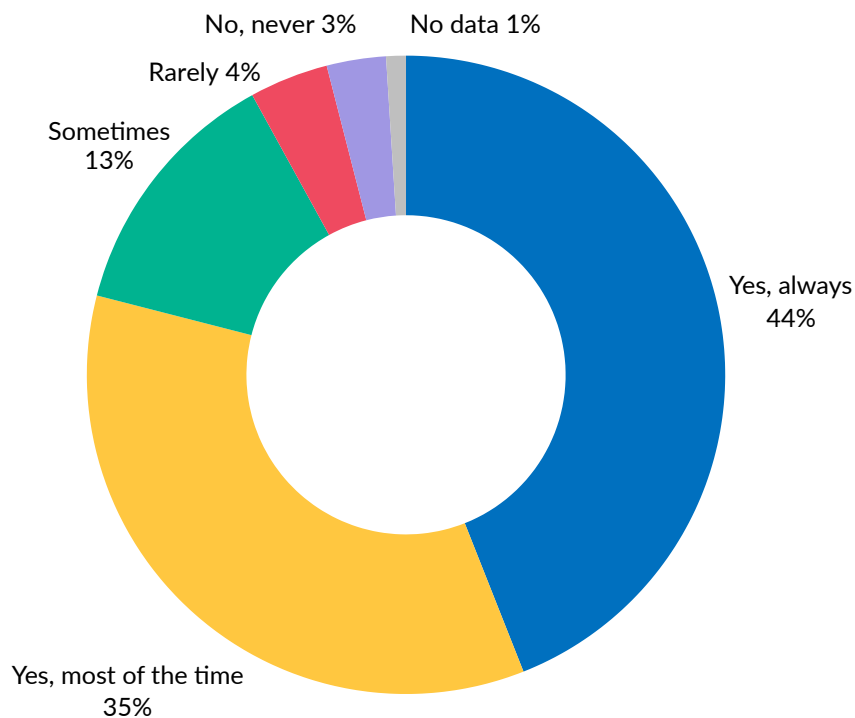
Conversely, refugee trust in Moldovan institutions is mixed. While two-thirds of refugees report trusting the local judicial system to deliver fair and impartial judgements (65 percent), fewer than half trust the police to handle crime and maintain order in a fair and just manner (47 percent), and only around one-third trust local public authorities to act in the best interests of the community (34 percent).

Social networks and community participation are essential for refugee integration as they provide support systems and opportunities for engagement within host communities. Close to four in five refugees (79 percent) feel welcome in their host communities (including 44 percent who say they “always” feel welcome), indicating a generally positive reception from local residents. A similar proportion (81 percent) feel that there is mutual respect between refugees and host communities. This sense of belonging can facilitate stronger social ties and encourage participation in community activities.

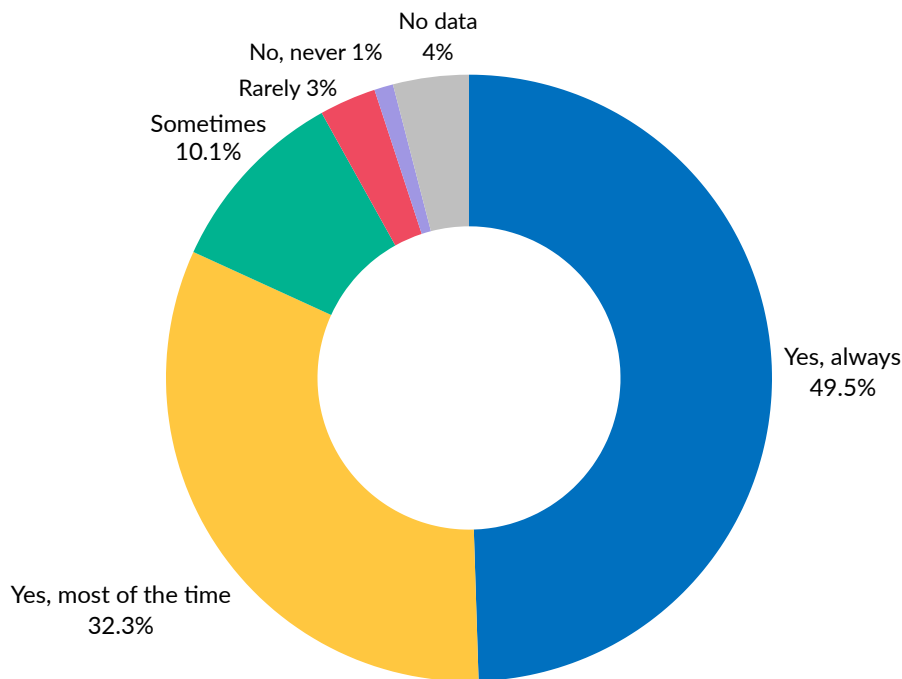
### Direct interaction with a refugee from Ukraine



### Refugees feeling welcome

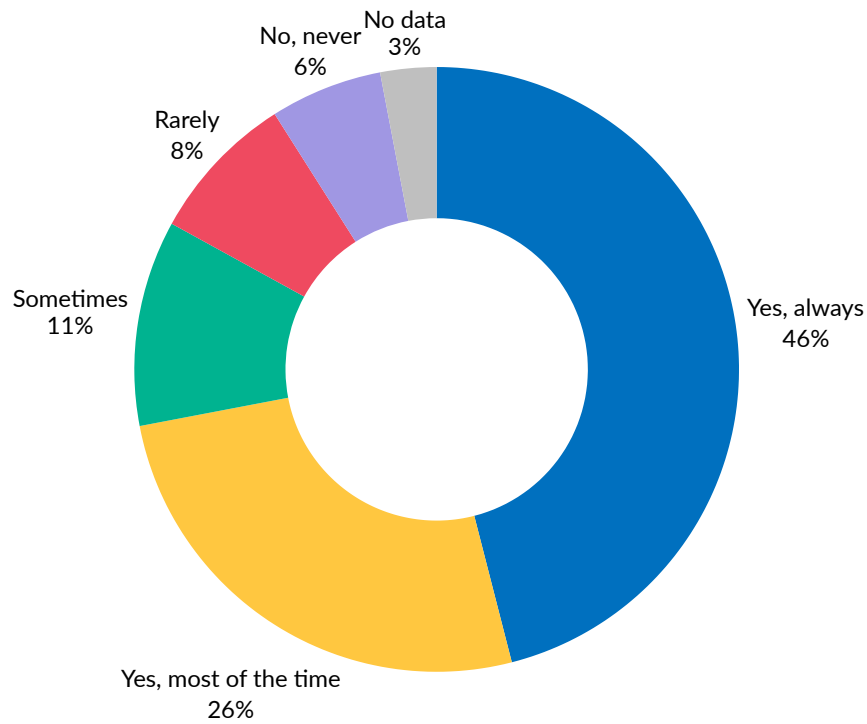


## Perception of mutual respect

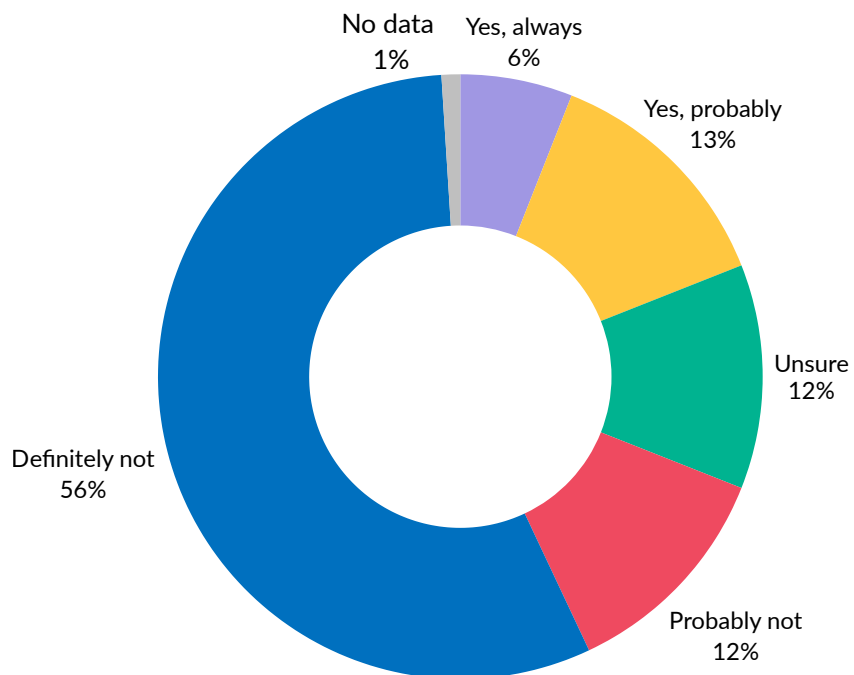


At the same time, only 44 percent of refugees report having a support network from which they could borrow money in an emergency, suggesting that deeper integration and trust-building are still needed. Moreover, despite generally feeling welcome within the community, almost one in three refugees (31 percent) report having experienced discrimination based on their nationality, including 10 percent who indicate this occurs regularly or occasionally. In addition, 14 percent of refugees say they rarely or never feel that they have the ability and freedom to make choices and decisions that affect their lives, highlighting room for a more integrated and supportive environment.

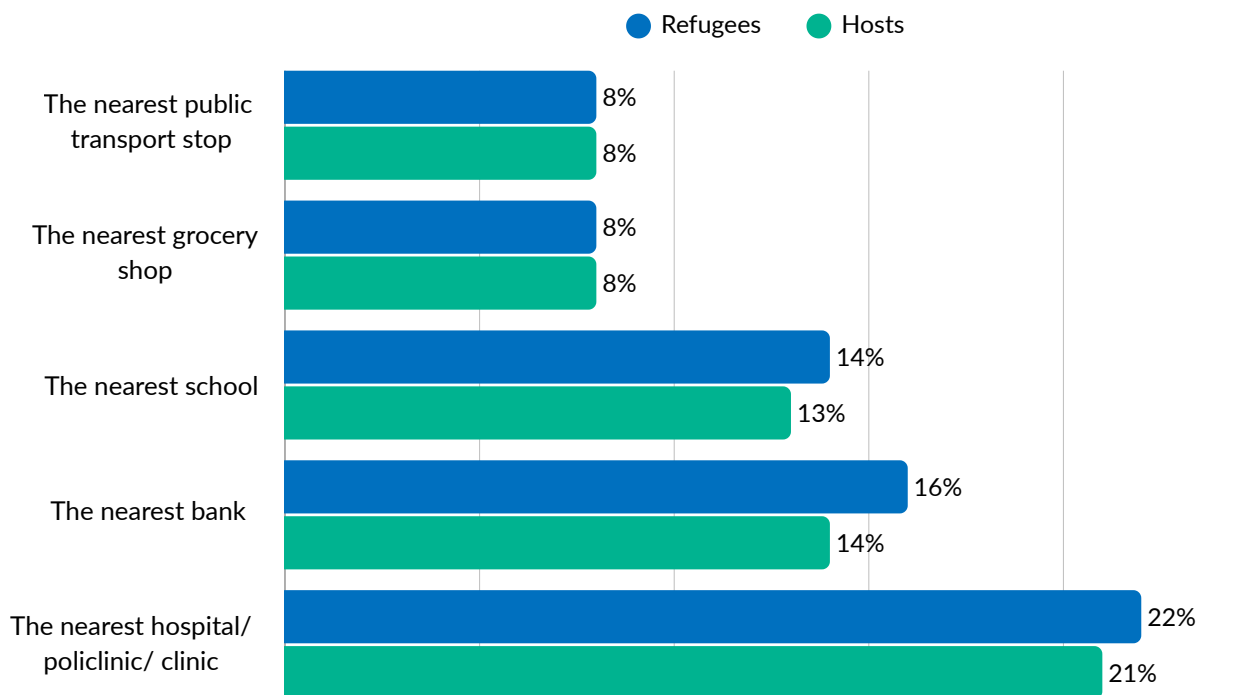
## Perceived ability to make life choices (among refugees)



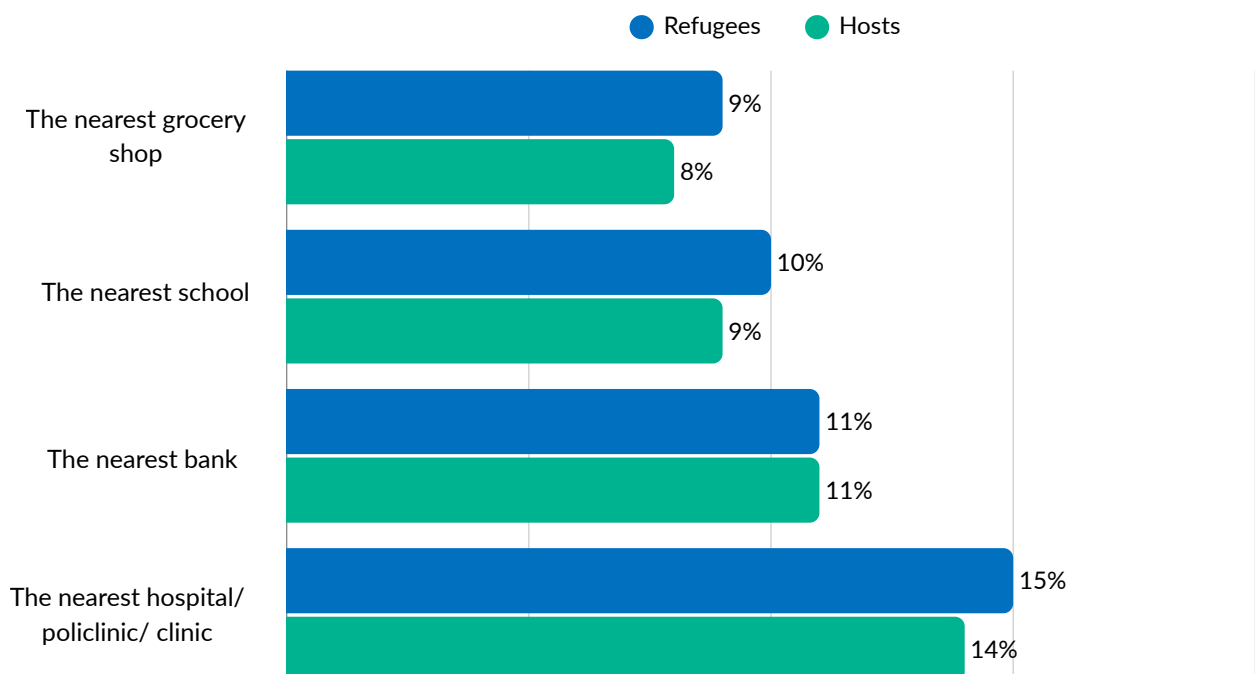
## Access to up to 250 EUR for emergency (among refugees)



## Duration when accessing services on foot, in minutes



## Duration when accessing services by car or public transportation, in minutes



Finally, critical to social inclusion is access to public services. Both refugees and hosts report having access to public transport, a grocery store, a school, and a bank within a 15-minute walk from where they live.

# Barriers and Opportunities

## Access to employment

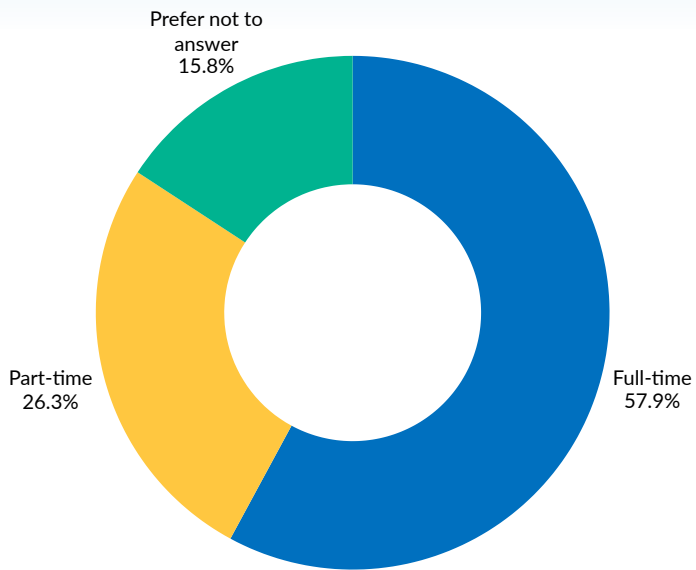
Refugees bring considerable professional experience from various sectors, with 83 percent having prior work experience. Notably, refugees (15 percent) are more likely than hosts (9 percent) to have experience in paid care work. This includes care for children, older adults, and individuals with chronic illnesses or disabilities. The gap in care experience is particularly marked in relation to childcare, with twice as many refugees as host respondents indicating that they have such experience.

Around three in ten refugees have worked since arriving in Moldova (29 percent). Within this group, more than one-third have held multiple jobs since arriving in the country (37 percent). Of those who have worked since arrival in the country, 42 percent have been in full-time paid work, 24 percent in part-time work, 22 percent in temporary or seasonal paid work, and 11 percent in self-employment.

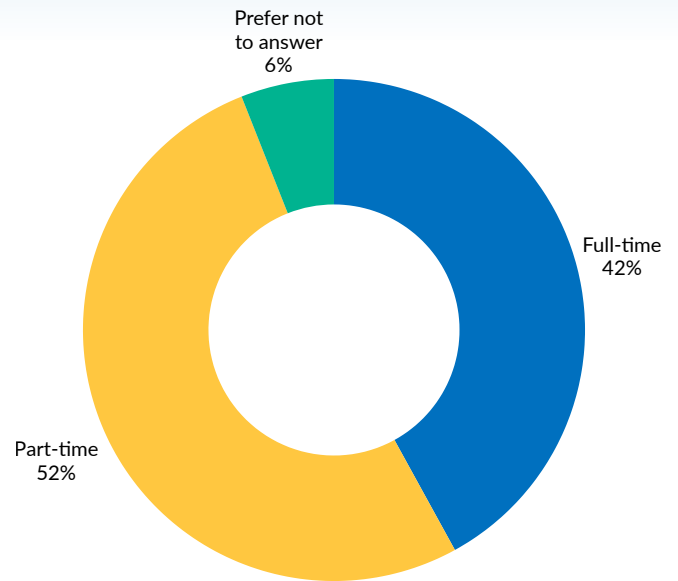
Ukrainian refugees in Moldova face much greater challenges in accessing employment compared to host communities. Refugees experience higher unemployment rates, with only 14 percent currently employed, compared to 33 percent of hosts. Despite this, refugees are twice as likely as hosts to be actively seeking employment, with 21 percent having looked for a job in the past month compared to 10 percent of hosts. This gap points to persistent barriers including limited proficiency in Romanian, obstacles to creating a business or self-employment, and limited availability of jobs matching existing skills and experience.

Employment conditions also differ significantly among those in work. Refugees are less likely to have formal employment contracts than hosts (69 percent compared with 87 percent of hosts). Furthermore, they are more likely to have an employment contract or verbal agreement for a fixed term period (31 percent compared with 21 percent of hosts), and less likely to receive a fully declared salary (67 percent compared with 85 percent). Finally, refugees are far less likely than hosts to report receiving paid leave or compensation for unused leave (39 percent versus 79 percent), and more likely to believe their employer is not paying social insurance contributions or payroll taxes on their behalf.

### Hosts' type of regular work



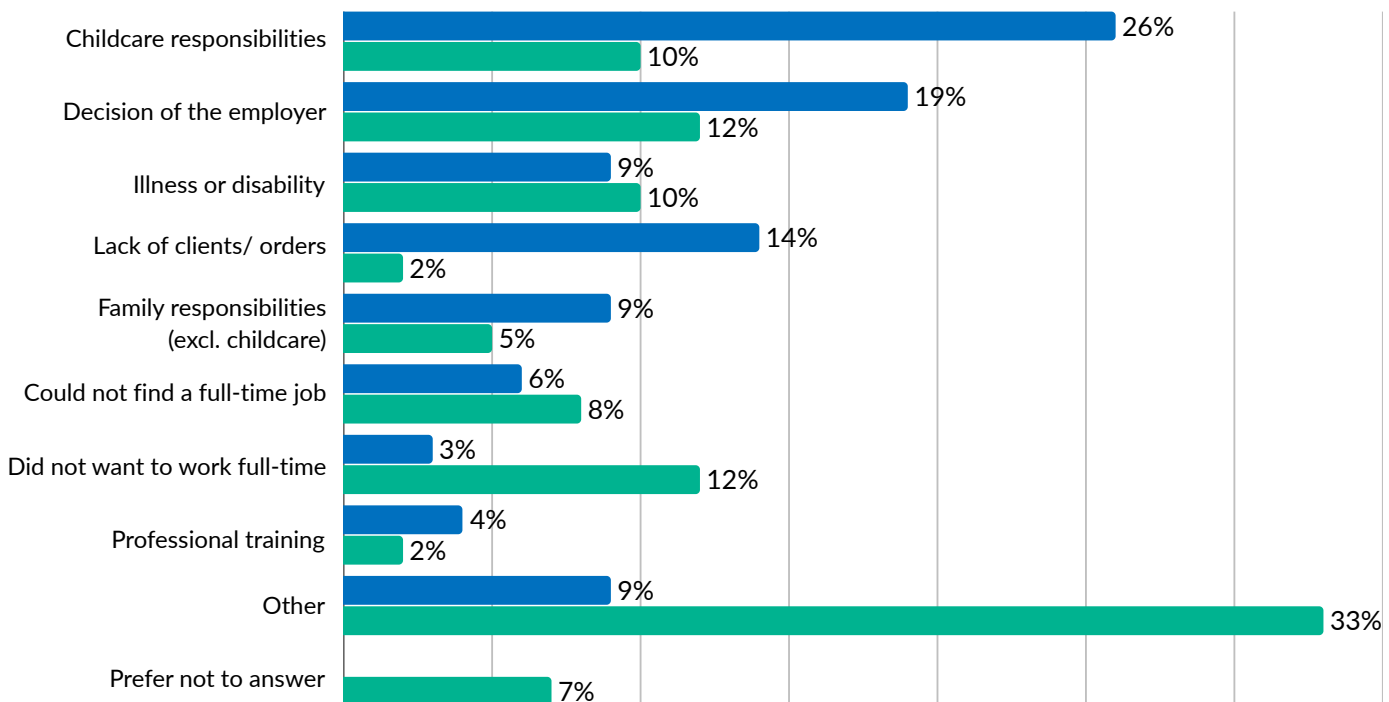
### Refugees' type of regular work



### Reasons for part-time) work

(out of the 44% working part-time)

● Refugees ● Hosts

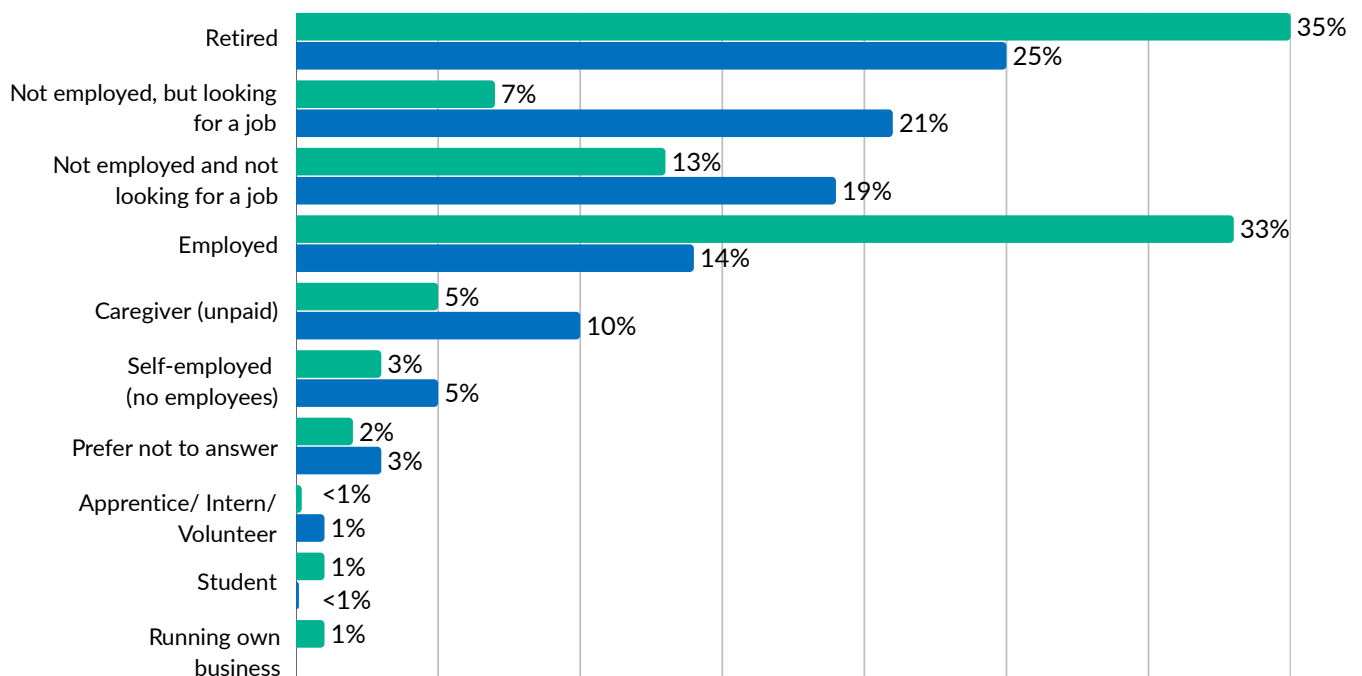


\*Among respondents currently employed, self-employed, doing an apprenticeship/internship/volunteering, or running a business

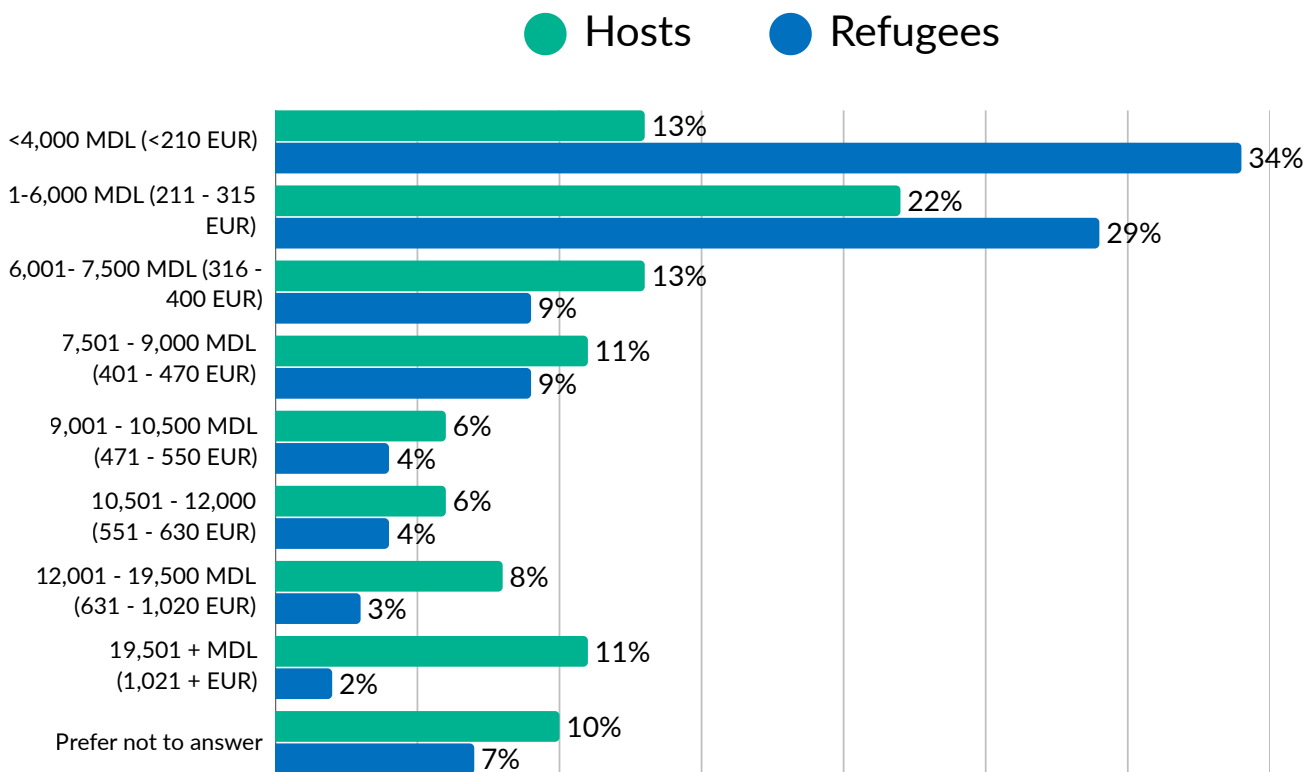
This lack of formal employment agreements can lead to job insecurity and limit access to employment benefits. Moreover, refugees are more likely to be engaged in part-time work, with 52 percent reporting part-time employment compared with 34 percent of hosts. This tends to be imposed rather than chosen: the two primary reasons for part-time work among refugees are childcare responsibilities and employer-imposed conditions.

## Professional Status

● Hosts ● Refugees



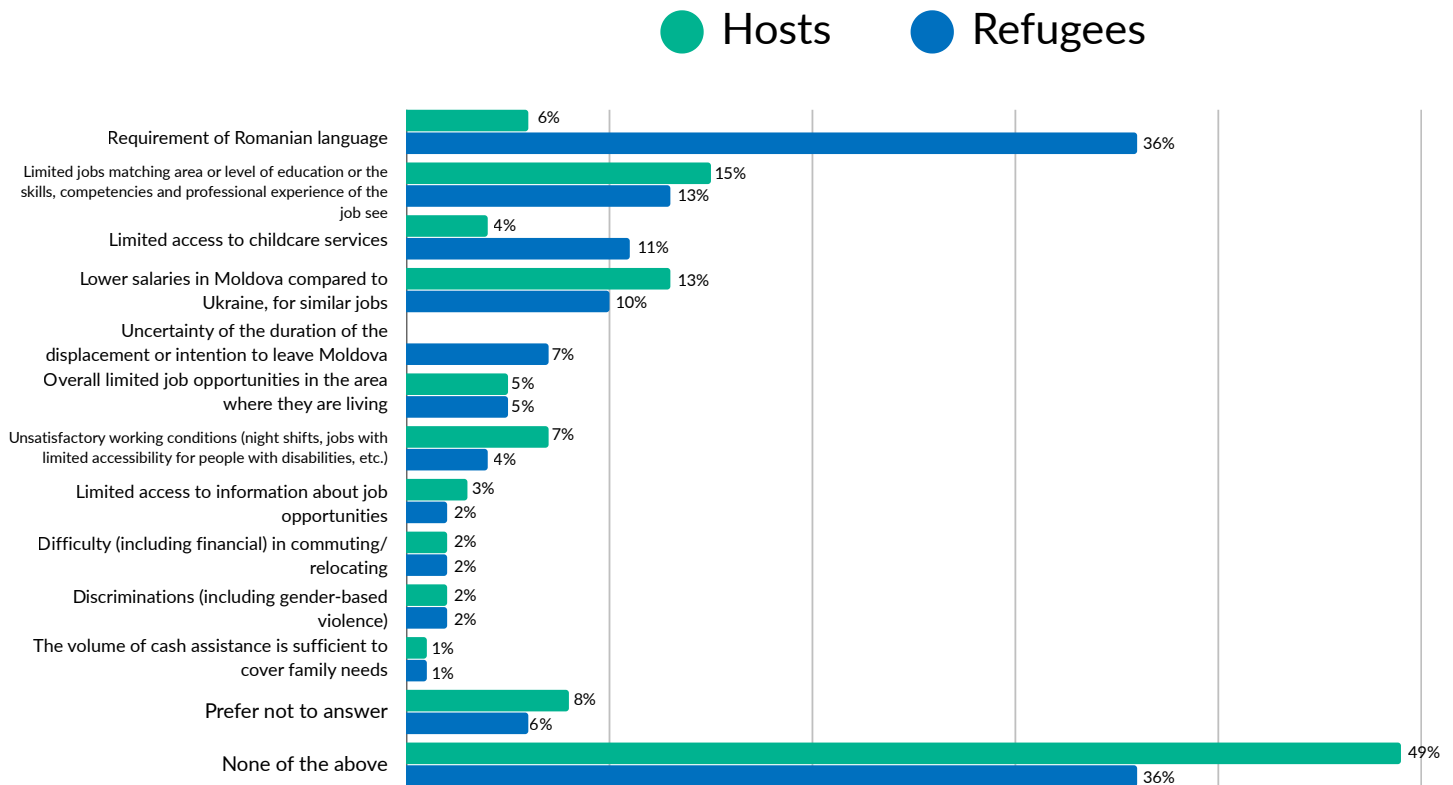
## Monthly net income



As a result, refugees earn a substantially lower monthly net income than hosts, with nearly twice as many refugees as hosts reporting a monthly income of 6,000 MDL or less (63 percent compared with 35 percent). In comparison, hosts are five times more likely to be earning over 12,001 MDL (19 percent compared with 4 percent).

Access to employment for Ukrainian refugees in Moldova is hindered by several barriers, which contribute to significantly higher unemployment rates compared to host communities. More than one third of refugees (36 percent) identify limited Romanian language proficiency as a significant obstacle to securing employment. This language barrier affects their ability to communicate effectively in the workplace and integrate into the local job market.

## Perceived barriers to finding and securing a job in Moldova



Refugees also face challenges in finding employment that matches their education and professional backgrounds. Only half of employed refugees report that their current occupation matches their level of education and professional expertise (51 percent), compared with two in three working hosts (65 percent). Employed refugees are also five times more likely than hosts to indicate that they are overqualified for their current occupation (11 percent compared with 2 percent). This mismatch is likely further exacerbated by limited job opportunities in certain regions where refugees reside, particularly in rural areas where there are fewer economic activities.

## Access to income-generating activities

Refugees are almost twice as likely as hosts to report having looked for an income-generating activity in the past month (23 percent versus 12 percent). Among those looking for work, both refugees and hosts report searching for around six months on average. Both groups are similarly likely to have registered with or approached the National Employment Agency in the past week (9 percent and 7 percent respectively among hosts and refugees). Nearly half of those looking for work are seeking full-time employment (44 percent on average); this is consistent across refugees and hosts. However, refugees are more likely than hosts to be seeking part-time work (49 percent compared with 31 percent).

The main obstacles reported during the search for employment are linked to language barriers and job relevance. Among refugees, the fact that job advertisements are in Romanian is a major barrier (cited by 45 percent compared with 10 percent of hosts), followed by the absence of suitable vacancies (14 percent and 17 percent, respectively).

Other constraints to accessing income-generating opportunities include care responsibilities and unsatisfactory job conditions. Among respondents who are not employed and not seeking work, family responsibilities are the main reason for inactivity, particularly among refugees (cited by 50 percent of refugees not employed and not looking for a job, compared with 29 percent of hosts).

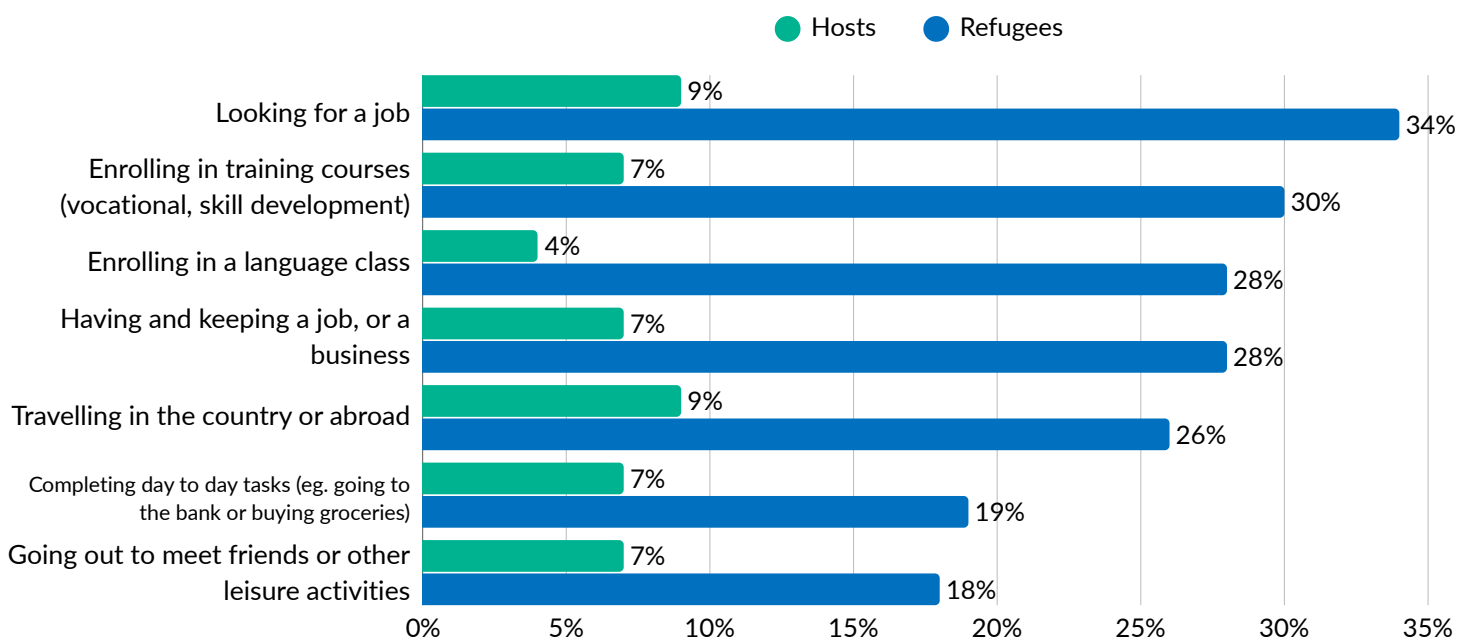
The type of support most frequently identified as needed to find and secure employment include job identification and matching support, vocational training and skills development, and support with accommodation or rent. While refugees and hosts are equally likely to require support with job identification/job matching and with vocational training/skills development, refugees are far more likely than hosts to need support with accommodation or rent (32 percent of refugees compared with 7 percent of hosts). Around one in five respondents (across both groups) would be interested in job or career counselling (22 percent) and childcare support (18 percent).

# Access to Social Services

## Access to education or care services

Access to education among Ukrainian refugees and local Moldovan host communities shows distinct patterns and challenges. Refugee children have a significant presence in the Moldovan education system, with 57 percent of those aged three to 18 attending formal education in Moldova, while 36 percent access Ukrainian distance learning. This high level of participation in education, whether through Moldova's formal system or Ukrainian distance learning, underscores a crucial need. It is essential to maintain a continuum of educational access that allows refugee children to integrate into local Moldovan schools while also preserving their connection to Ukrainian education. This approach ensures educational continuity for these children during displacement. In 8 percent of refugee HHs, at least one child does not attend school. The preference for Ukrainian distance learning among refugee families reflects ongoing ties to their home country's educational framework and suggests potential challenges in adapting to the Moldovan curriculum and language.

### Activities negatively affected by a lack of care services



\*Among HHs with members having difficulties or with children who do not access care services

Disparities in access to early childhood education services, such as kindergartens and crèches, are more evident among refugees than hosts. Only 20 percent of refugee HHs report that all children under the age of three attend such facilities, compared with 40 percent of host community HHs. Across both groups, the main reasons why young children remain out of childcare is parental preference for taking care of the child at home (45 percent across both groups combined) or the lack of available places in childcare (15 percent across both groups).

When children remain outside of schooling or care systems, this impacts their ability to integrate at school as well as parents' ability to work. Among the 10 percent of children reported to be out of school, the vast majority stay at home with a parent during the day instead of attending school (91 percent across both groups combined, due to low base sizes).

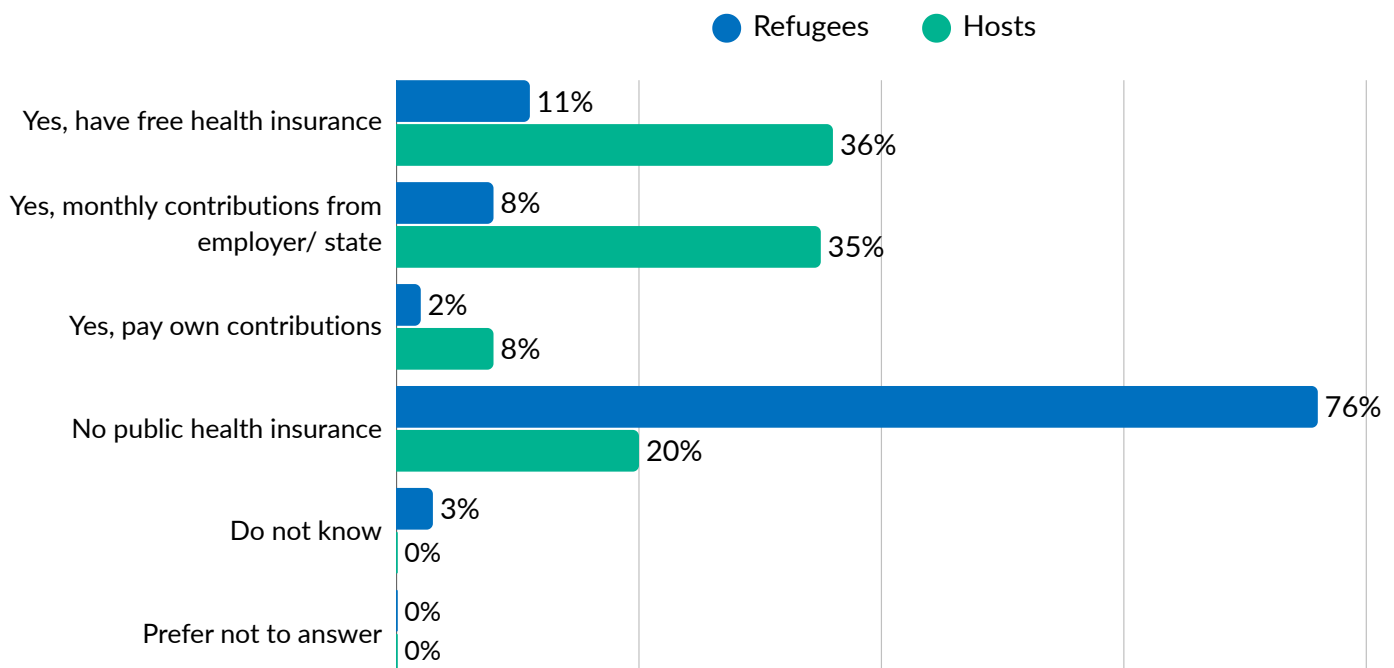
Lack of care services (for children, older people, or persons with special needs) has a significant impact on individuals' ability to look for employment, enroll in a training course, or maintain a job or business. This is especially pronounced among refugees, who are close to four times more likely than hosts to indicate that a lack of care services has a negative impact across all of these areas.

Fewer than one in five households (13 percent of refugee HHs and 16 percent of host HHs) have accessed care services in the past twelve months. The main reason reported for not accessing such services is the preference for homecare (noted by 43 percent of those not accessing such care, across both population groups combined).

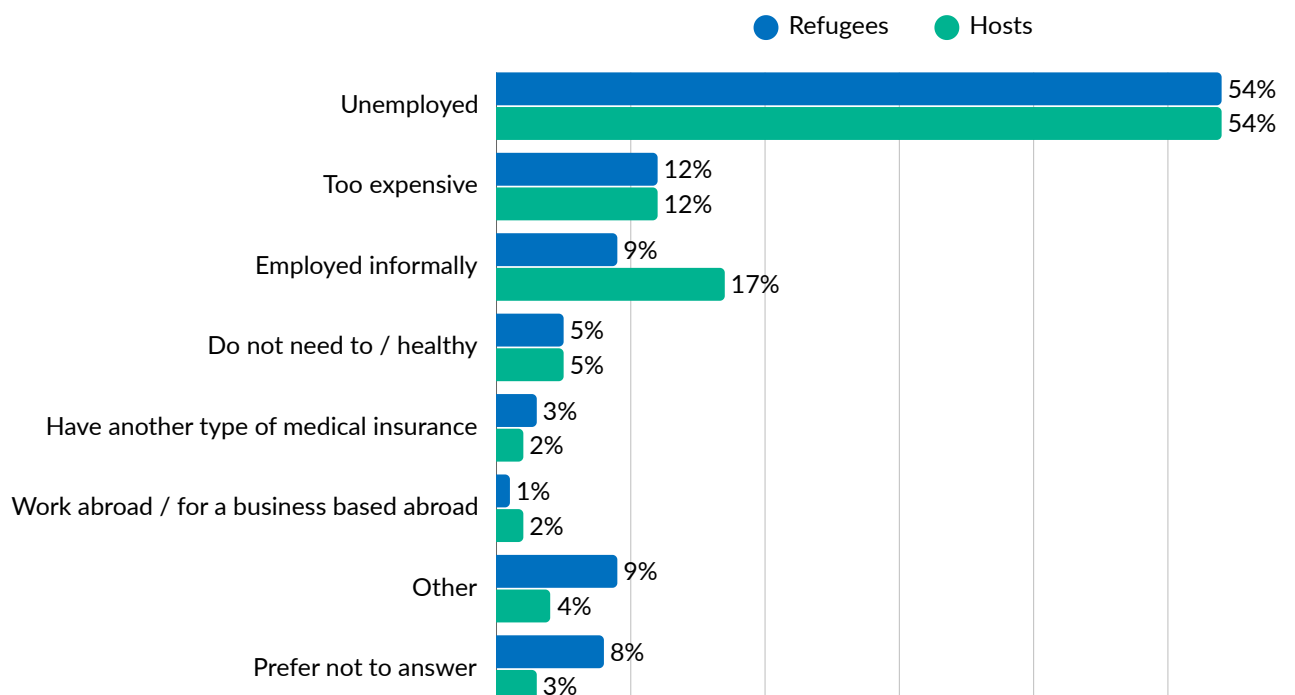
## Access to healthcare

Ukrainian refugees experience significant barriers to comprehensive health care compared to local host communities. This disparity is systemic: while emergency care is accessible, access to family doctors and health insurance is structurally limited to those in official employment. Only one in five (21 percent) of refugees have public health cover, compared to nearly four in five (79 percent) of host communities. This presents a risk for unmet medical needs and increased vulnerability.

## Health insurance coverage



## Main reason for not having public health insurance in Moldova (out of the 57% with no public health insurance coverage)



Among those without public health insurance, the main reason includes unemployment, the cost of insurance, and informal employment. Despite their more precarious employment situations, refugees are less likely than hosts to indicate a lack of health insurance due to informal work (17 percent compared with 9 percent of refugees).

In terms of healthcare uses, 44 percent of refugees report having accessed healthcare in the past month, compared with 31 percent of hosts. This includes visits to health or medical centres, medical point, or doctor's offices.

Despite the higher rates of access to medical care among refugees, their engagement with healthcare services is often more challenging, including financial constraints and language barriers. Refugees are more likely than hosts to have cancelled or missed a medical appointment in the past 12 months despite needing medical care, indicating barriers to healthcare utilization for the refugee population (26 percent compared with 17 percent of hosts). The primary reasons for this include self-treatment, financial barriers, and long waiting lists. Although self-care and affordability are cited equally by refugees and hosts, hosts are more likely to say they cancelled or missed an appointment due to long waiting lists (25 percent compared with 13 percent of refugees).

The quality of care and experience within the healthcare system is consistent across the two groups, with nearly nine in ten respondents who accessed medical services indicating that when doing so, they were treated with respect and professionalism (85 percent of refugees compared with 89 percent of hosts). Nevertheless, around one in ten felt discriminated against by at least some of the medical personnel, suggesting room for a more inclusive healthcare system (14 percent of refugees compared with 11 percent of hosts).

Only two in three refugees indicate being aware of their rights to health services (65 percent), indicating an important knowledge gap. Of those who are aware of these rights, half heard about them through an international organization (50 percent), and a further third (31 percent) heard about them through word of mouth. Only one in ten refugees indicate having learned about their rights through a government campaign or government officials (10 percent). Over one in ten refugees report having been refused their right to healthcare (15 percent).

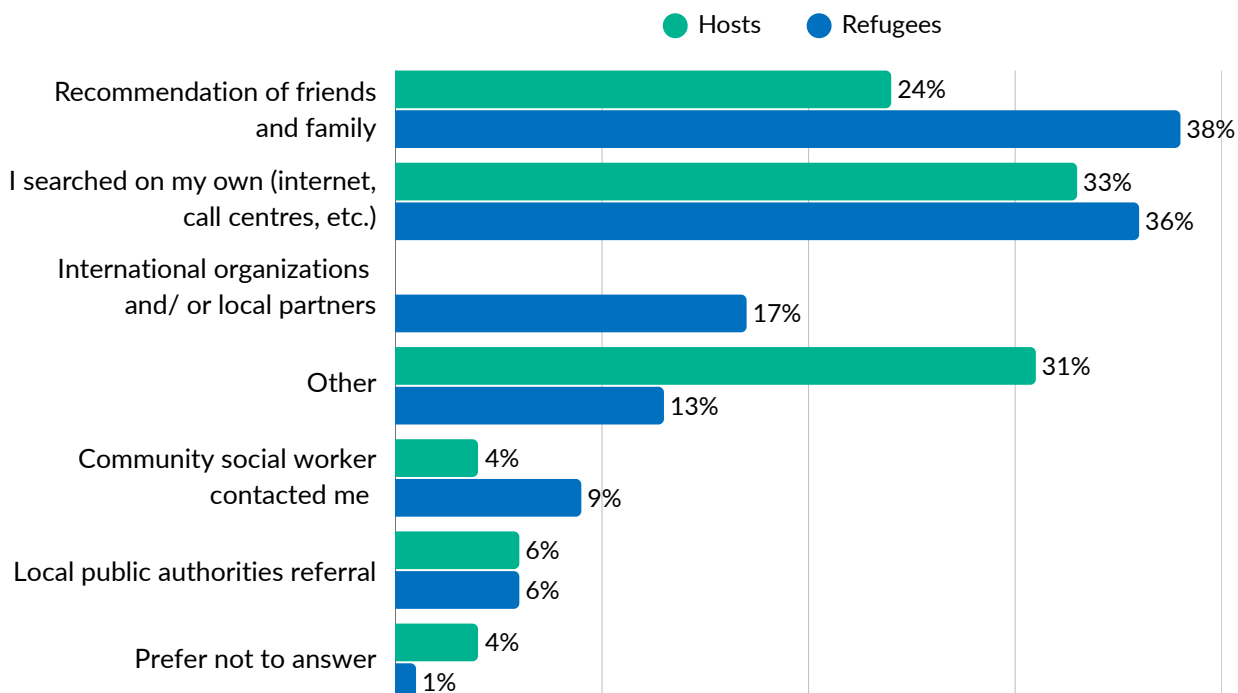
## Access to social assistance

Refugee HHs are significantly more likely to have received cash payments and vouchers in the month prior to the survey, with 47 percent of refugee HHs benefiting from cash assistance compared to just 9 percent of host HHs. Similarly, 32 percent of refugees received vouchers, compared with 2 percent of hosts. The most common form of vouchers received include vouchers for food (22 percent of refugees compared with 1 percent of host households), and vouchers for different goods (18 percent of refugees compared with less than 1 percent of hosts).

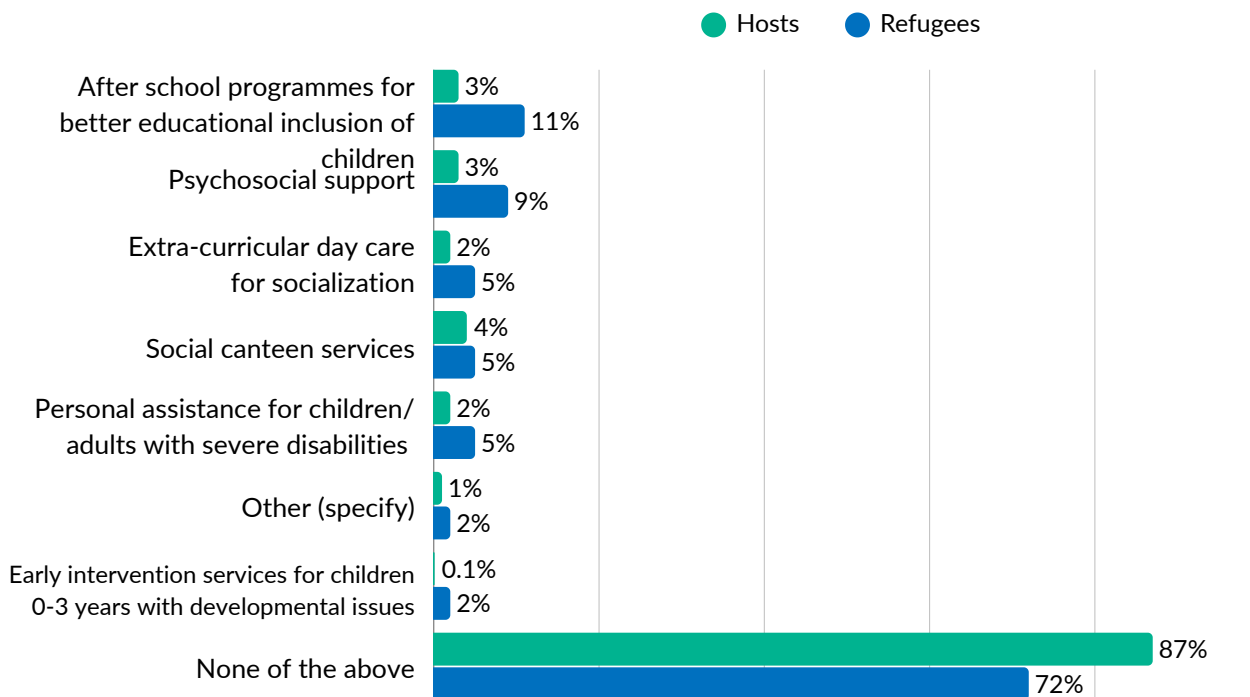
Two in three refugee HHs accessed assistance from programmes including the Energy Vulnerability Fund or *Ajutor pentru perioada rece* (APRA) (Cold Season Assistance Programme) over the 2023/2024 winter, compared with around three in five host HHs (67 percent versus 58 percent). Most common assistance received included gas payment compensation (67 percent across both populations), and to a lesser extent, electricity bill compensation (23 percent). While three in four refugee HHs who received assistance felt they were treated with respect and professionalism by social workers, the perception was far more negative among host HHs (75 percent compared with 31 percent).

### How did they know which social institutions/ services to approach to receive support?

(of those who accessed humanitarian programmes)



## Needs in social services



Respondent HHs who received cash payments, vouchers, or assistance through winter support programmes were most likely to have found information about this support by self-searching (for example, on the internet) or the assistance was recommended by friends or family. When asked what social services they would need in the future, the majority indicated they would not need any such services (72 percent of refugees and 87 percent of hosts respectively). However, after school programmes and psychosocial support were requested by 8 percent and 7 percent of respondents, respectively (both populations combined).

# Conclusions

The findings from this comprehensive socioeconomic assessment paint a complex picture of refugee integration in Moldova—where refugees have been displaced on average for 22 months—marked by both successes and ongoing challenges.

Although over two in three refugees consider living standards in Moldova to be “satisfactory”, many experience greater financial difficulties than host communities (56 percent of refugee HHs versus 46 percent of host community HHs reported financial difficulties in the past year). While refugees generally have higher educational attainment, language barriers and limited employment opportunities that match existing qualifications constrain access to suitable employment, resulting in lower incomes (63 percent of refugee HHs earn 6,000 MDL or less per month, compared with 35 percent of host HHs). Many refugee HHs also experience difficulties with securing employment (14 percent employed compared to 33 percent of hosts). As a result, refugee HHs are more likely to rely on social assistance, in addition to facing barriers to financial inclusion, with only two in five refugee HHs (41 percent) with access to a bank account.

Access to accommodation is also a concern, with 66 percent of refugees renting private accommodation and 27 percent reporting difficulties covering rental costs. While most refugees have access to essential amenities, issues like dampness (21 percent), rotten window frames (14 percent), and leaks (11 percent) affect their living conditions.

Social inclusion presents a mixed picture. Most refugees (79 percent) feel welcome, but experiences of discrimination (31 percent) and limited support networks (only 44 percent of refugees have access to emergency borrowing) persist.

Access to education for refugee children is relatively high, with 57 percent in Moldovan schools and 36 percent accessing Ukrainian distance learning. However, limited access to early childhood education (20 percent of refugee HHs compared with 40 percent of hosts) and care services for vulnerable household members (accessed by 13 percent of refugee HHs with such needs) create barriers, especially for those seeking employment.

Healthcare access reveals disparities, with only 21 percent of refugees with public health insurance compared to 79 percent of hosts. Furthermore, 26 percent of refugees have missed or cancelled medical appointments due to financial constraints or self-treatment, compared to 17 percent of hosts. Levels of awareness of healthcare rights suggest that this is an area that could be improved, as only two in three refugees report being aware of their rights, primarily through international organizations.



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Anna is a refugee who lives in the Transnistria Region of Moldova. She moved from Odesa in 2022, with her family of 4. She is rebuilding her life in Moldova and she helps other refugees to do the same.

# Annex 1

## Research questions

The following research questions lay the foundation for the overall analytical framework started by the current exercise; however, some of these questions were resolved through the complementary activities to the quantitative component. Consequently, the analysis follows a tiered structure. The current analysis focuses on the immediate quantifiable results, while the remaining complex or high-level inquiries are reserved for dedicated analytical briefs.

# 1

What is the **demographic profile of the refugees and local population in host communities** and the socioeconomic conditions in both cases? Focus on building the **demographic profile, analysis of the living conditions, incomes, expenditures**, and occupation (employment status) in both cases, and comparing data between the two target groups. Analyze the demographics of families hosting unaccompanied children and analyze if the demographics of families hosting unaccompanied children differ from families who do not.

# 2

What is the **labor/ skills profiles of Ukrainian refugees and host community members** (levels of education, existing skills, competencies, professional experience) by region (North, Center, South, and Chisinau). What skills would refugees be interested in developing?

# 3

What is the **interest and intention of the refugees to access formal employment in Moldova, open a business, enroll children in schools?** Is there any correlation with refugees' application for Temporary Protection?

# 4

What are the **major barriers and opportunities** for the refugees to **access employment, entrepreneurial opportunities, and livelihood-related activities** (vocational training, skill development, language improvement etc.)?



What are the **major barriers and opportunities for refugees to access employment?** Focus on barriers identified in other analyses and assessments, including: limited jobs matching area or level of education; limited jobs matching skills, competencies and professional experience; limited jobs available for people with disabilities; overall limited job opportunities in the area where they are living; unsatisfactory working conditions; limited access to information about job opportunities; salary discrepancy between Ukraine and Moldova (at the sectoral level); limited language skills; volume of cash assistance; limited access to childcare services; difficulty (including financial) in commuting/relocating; legal, institutional and regulatory barriers to business creation (actual and perceived); stress/ trauma; discriminations, including gender-based discrimination; uncertainty of the duration of the displacement; intention to leave Moldova; other.



What are the **major barriers and opportunities for the refugees to access entrepreneurial opportunities (open new business in Moldova/ relocate business from Ukraine to Moldova)?** Analyze the following barriers and identify other: legal, institutional and regulatory barriers to business creation (actual and perceived); limited access to and poor quality of entrepreneurial training; limited access to and poor quality of business development services; limited access to necessary financial services (bank account in Moldova, credit, savings...); issues with telecommuting for Ukrainian companies; discriminations, including gender-based discrimination; uncertainty of the duration of the displacement; intentions to leave Moldova.



What are the **major barriers and opportunities for the refugees to access livelihood-related opportunities** (vocational training, skill development, language courses, etc.)? Analyze the following barriers and identify other: limited trainings matching profiles and interests; limited access to childcare services (for children under 3, 3 to 7, and 7 and above); difficulty in commuting; limited access to information about training opportunities; discriminations, including gender-based discrimination; uncertainty of the duration of the displacement; intentions to leave Moldova; indecision regarding the area of study.

## 5

What are the **major barriers and opportunities** for refugees to **access education and related services**? Focus on access to **kindergartens** (including Crèche-s-childcare services for children under 3), and **access to colleges or universities** in Moldova. Analyze the following barriers and identify others: difficulties in obtaining information on available educational activities and opportunities; insufficient seats in Russian-language schools; language barrier; refuse to place children in Russian schools; refugee children and youth continue to attend online education provided by the Ukrainian Government; uncertainty of the duration of the displacement; intention to leave Moldova.



What are the major barriers and opportunities for the refugees to access State public institutions and services in Moldova? Analyze the **challenges in accessing public services, access to medical services/health care, transport, and social protection. Analyze refugees' access to and usage of available digital services in Moldova** (including mobile money), and **energy access and usage**. Analyze energy poverty among refugees and compare it to host community members' energy poverty. Analyze access to accessible infrastructure and transportation for persons with disabilities.



What is the **status of social inclusion of refugees** into host communities throughout Moldova? Focus on social networks and community participation, social networks and employability, communication and access to information, community and mutual support and its importance in the context of the crises, and language barriers.



What are the **major barriers in terms of the mobility of refugees** and risks associated with human mobility (movement within the country)? Analyze the correlation between mobility and access to employment and self-employment opportunities and access to services (e.g. signing up for social assistance or humanitarian assistance, child attending extracurricular activities, etc).



What are the **perceptions in the private sector towards the inclusion of refugees as clients** or beneficiaries and **potential employees**? What skills, competencies, and profiles are required to fulfill gaps and support private sector development? Focus on the most attractive sectors of the local economy and the potential for inclusion by region (North, South, Center and Chisinau mun.). Identify potential opportunities in priority sectors for broader structural transformation.



**What has been achieved so far regarding refugees' socioeconomic inclusion and what are the remaining gaps?** Analyze existing programmes and government capacity, as well as national and local government development responses; identify effective responses and practices.



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