



Regional Refugee Response
for the Ukraine Situation

ROMANIA 2023 MULTI-SECTOR NEEDS ASSESSMENT



Contributions

MSNA is conducted in the framework of:



Developed, implemented, and analysed by:



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List Of Acronyms

AAP	Accountability to Affected Populations
FD	Family Doctor
CSCM	Centre for Comparative Migration Studies
CP	Child Protection
GBV	Gender-Based Violence
HH	Household
IOM	International Organization for Migration
MHPSS	Mental Health and Psychosocial Support
MSNA	Multi-Sector Needs Assessment
MCQ	Multiple Choice Question
N	Total number of observations
R	Programming language is an open-source scripting language for predictive analytics and data visualization
PSEA	Protection from Sexual Exploitation and Abuse
RCU	Refugee Children from Ukraine
RRP	Refugee Response Plan
TP	Temporary Protection
UNHCR	United Nations High Commissioner for Refugees
UNICEF	United Nations International Children's Emergency Fund
WASH	Water, Sanitation and Hygiene
WG	Washington Group
WHO	World Health Organization

Geographical Classifications and comments

Municipality: is an administrative unit in Romania which corresponds to a locality of urban type with a special role in the economic, social-cultural, scientific, political and administrative life of the country, with important industrial and commercial structures and institutions in the field of education, protection of healthcare and culture.

Județ: is an administrative unit in Romania, also known as a county. This MSNA covers 31 counties or județe and the capital city of Bucharest.

Ukrainian refugee (household): is used to define all refugees (households) that migrated from Ukraine to Romania following the escalation of hostilities in Ukraine since February 2022, independent of their nationality.

CSs and host community: these terms are used in chart legend to describe respectively refugees living in CSs and refugees living in the host community in the sample, and should not be understood as other individuals from both communities, such as aid providers, hosts, etc.

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Executive Summary

As of the end of December 2023, more than 6.3 million refugees had reportedly fled Ukraine, and around 81,000 were residing in Romania. In mid-2023, UNHCR conducted a Multi-Sector Needs Assessment (MSNA), focusing on refugees from Ukraine living in Romania. The assessment involved 1222 adult respondents from refugee households across 31 counties and Bucharest, in Romania. The information gathered is crucial for humanitarian planning as well as identifying service gaps. The findings informed the 2024 Refugee Response Plan (RRP). The assessment focuses on topics such as demographics, education, protection (including child protection, gender-based violence, and protection from sexual exploitation and abuse), socio-economic inclusion and livelihoods, health (including mental health), and accommodation/shelter. This executive summary provides an overview of the findings, which are detailed on the following pages.

Demographics

On average, the interviewed households consist of 2.85 members, predominantly living in urban areas of Romania, with the biggest number of households living in Bucharest. Female-headed households represented 88%, with women and girls accounting for 63% of HH members. The majority of household members are adults, accounting for up to 73% of the individuals examined. Ukrainian citizenship is held by 100% of respondents, and 96% of them ethnically self-identify as Ukrainian. Most of those surveyed arrived from Odeska (38%) and Khersonska (14%) oblasts. Some 52% had stayed in Romania for at least one year, and 45% arrived between April and September 2023. Out of the total individuals in the surveyed households, 6.85% are reported to have a level three form of disability¹.

According to the sample, 68% of refugee households living in Romania include at least one child. From the total of households with children, in 7.8% of the households, the children are not living with any of their biological parents, in 3.5% of the households, the head of household is aged over 60 (falls under the older person category) and in 2% of the households, the head of the household is aged under 25 years.

Education

In the school year 2022/2023, 40% of the school-aged children were enrolled in an official educational track in Romania. For the school year 2023/2024, it is important to mention that the data was collected just until the

beginning of the respective school year and 51% were reported enrolled and planning to attending. Among the primary reasons for non-enrolment were the fact that the child was attending Ukrainian distance learning (61%), the language barrier (20%), and caregivers who did not want to put an extra burden on the children (4%).

In terms of adult education, a great part of the surveyed population - the respondents and their family members included - has a tertiary education, with over 56% having at least a Bachelor's degree. Aside from this, 81% of the household heads have either technical/ vocational education or at least a bachelor's degree.

Protection

96% of the respondents have obtained temporary protection (TP) from the Romanian state, with a minimal percentage lacking proper identification. Most children under five (94%) have legal documents. Access to legal status and documents is crucial for accessing support programs and services.

While 94% didn't face issues during the TP application, challenges included long queues, difficulty in accessing registration points, and information. These challenges were prominent in early 2022 but diminished by 2023.

Concerning social integration, 28% report tensions in personal communication with Romanian citizens, potentially escalating to more significant issues. Additionally, a notable portion of respondents lack awareness of available services. While the majority of

¹ Level 3 of disability is computed based on the respondents who answered "a lot of difficulty" and "can not do at all" in

the survey. The criteria for level 3 of disability was established by the Washington Group on Disability Statistics.

refugees generally feel safe in Romania, there is an ongoing concern, as perceived by actors in the refugee response, about potential underreported abuse, especially regarding gender-based violence.

Socio-Economic inclusion and livelihood

As per the sample, 60% of the Ukrainian working-age refugees are inside the labour force (as per the definition, inside labour force refers to all the people who work and/or are actively seeking a job, aged 16-62 for women and 16-65 for men), while 33% are outside the labour force, meaning that they are not able to work or are not looking actively for work. Aside from this, out of the individuals in the labour force, 33% are gainfully employed, while the rest of 27% are reported to be unemployed.

To facilitate access to the job market, 54% of the respondents mentioned the need for language courses, 34% mentioned the need for job matching services, followed by 25% that have mentioned the need for skills recognition. Another need 21% of respondents mentioned is the need for childcare services. Meeting these needs could lead to an increase in employment and self-reliance. Similarly, the need for training was mentioned by 18% of respondents. A significant 54% also mentioned the need for social support for better socio-economic integration in the host country.

When looking at the occupational status of the head of the households with children, as per the sample, the largest proportion of respondents (40%) declared they are engaged in household or family responsibilities, 18% are unemployed, and 18% are employed, while the rest are engaged in other activities.

The language barrier is frequently mentioned as one of the most important factors impeding Ukrainian refugees' socioeconomic inclusion, access to healthcare services, enrollment of their children in Romanian schools, and other daily activities, as highlighted by other chapters of this report. Because Ukrainian and Russian are the most often spoken languages in families, preserving multilingual communication channels, supplemented by Romanian lessons, is an important factor to consider in the design of the humanitarian response.

Health

In Romania, people with temporary protection have access to free essential medical services, including access to a Family Doctor (FD), emergency medical procedures or other needed procedures. Since arriving in Romania, around 37% of the refugees managed to register with a Family Doctor, thus ensuring that they can access the medical services they need.

In terms of the need for medical services, it is reported that 33% of household members have a chronic illness and need constant medical care, and 44% of the households reported at least one member in need of mental healthcare services. Aside from this, within the 30 days preceding the survey, 28% of household members needed to access medical services. Out of them, 28% were not able to meet their medical needs.

Accommodation

Most of the surveyed population (78%) can cover rent and utilities independently, with only 6% fully relying only on assistance from government and/or non-governmental organizations. Another 6% live without incurring costs due to staying with friends, and 3% share expenses with other tenants or have specific arrangements.

The average monthly rent expenditure is around 2,015 RON (Romanian leu), with 53% of households managing payments without significant financial distress. While only 3.5% of households feel pressure to leave their current accommodation, more than two-thirds of the respondents lack long-term tenure security. As subsidized housing decreases and delays occur in payments under the new government assistance program, concerns about potential further financial hardship arise. This could lead refugees to adopt negative coping mechanisms like cutting spending on food, hygiene items, or other basic needs to afford accommodation payments.

Introduction

Background

The **Multi-Sector Needs Assessment (MSNA)** represents the largest inter-agency, multi-sectoral assessment conducted at the national level that seeks to capture and understand:

- The structure of the Ukrainian refugees' households living in Romania.
- The needs of Ukrainian refugees living in Romania.
- The current level of access to basic services and how refugees' needs are met.
- Service gaps and refugees' priorities for the coming year.

This MSNA is a regional tool developed for all the countries in the Ukraine response, and its adaptation and implementation are the result of cooperation between UNHCR, CSCM and IOM. The findings of this assessment are used to inform the 2024 Refugee Response Plan (RRP).

The main objective of this data collection endeavour was to obtain a comprehensive image of the current needs of the Ukrainian refugee population living in Romania. Moreover, a systemic assessment of the services provided has been conducted, indicating the areas that need interventions and further adjustments.

As the second year of implementation in Romania, the MSNA kept its general objectives and managed to better reach the Ukrainian households in Romania. The data were collected across the country and indicated the multi-sectorial needs of the refugees, including the possibility of deep diving into in-country comparisons and incorporating the findings into further strategic planning. As services for refugees are offered by various partner institutions, the findings can be aligned with the future programme objectives and activities.

As of 31 December 2023, more than 150.000 refugees from Ukraine have been issued Temporary Protection (TP) permits since the beginning of full-scale invasion, out of which around 81.000 were still living in Romania. Moreover, since 24 February 2022, Romania has registered more than 5.1 million border crossing of Ukrainians and third country nationals (TCNs) coming either directly from Ukraine or via the Republic of Moldova. Considering the population that is currently living in Romania, the MSNA sampled a number of 1,222 households (representing more than 3,400 household members) that reside across Romania.

The data collection was conducted during the summer months and preliminary results were presented in October 2023 to the Inter-agency Sector Leads. Further workshops and presentations were delivered in November and December 2023 to partner organizations, UN agencies and state institutions with the main aim to inform and generate data-based policies and responses for the refugees. After the initial presentation, a first round of feedback was incorporated into the analysis and the preliminary findings were updated. A subsequent round of feedback was incorporated into the final analysis and the report.

Objectives of the survey

The main objective of the MSNA is to offer a complex and in-depth overview of the Ukrainian needs living in Romania, if these needs are met and what services need to be adapted and improved based on the current situation. The analysis is centred around the following topics: demographics, education, protection (including child protection, gender-based violence, and protection from sexual exploitation and abuse), socio-economic inclusion and livelihoods, health (including mental health), and accommodati

Methodology

Sampling, Representativeness and Geographical Coverage

Household surveys, together with population census and administrative data, represent one of the best tools to collect information and understand the profile of a specific population². Being more flexible than population census and offering more information on various aspects related to the daily life of the people than administrative data, household surveys became one of the preferred tools for investigating social phenomena and understanding tendencies among displaced populations.

Therefore, to achieve the goals of the MSNA, the initial methodological step included the design of a comprehensive survey. Sample representativeness is gauged by two important elements: the confidence level and the margin of error. In this case, the sample had a margin of error of 3% and a confidence level of 95%. In other words, if the survey were conducted 100 times, the real data from the population would be 3 % below or above the results collected in 95 out of 100 cases. Since the population included in this study (the Ukrainian beneficiaries of temporary protection) is part of the so-called “hidden groups”, in the second step, the aim was to reach these groups by using the UNHCR data set³ and following the principles of representativeness. Therefore, the final sample used in this MSNA study is representative to the UNHCR dataset, which was used also for the identification and contact of the subjects⁴.

The population included in the study is represented by adult Ukrainian refugees who came to Romania after 24 February 2022 and were living in the country at the moment of data collection, July-September 2023. Children were not included in the sampling process, but

information about them was collected through the set of questions addressed to the focal points (head of the household) or other adults from the household. Considering the total population size living in Romania at the time of the data collection (around 83.000) and the access to the UNHCR database of people registered for cash assistance, which comprises data about 55,000 individuals, a sample of 1,200 households was generated. While the initial aim was to generate a random sample, one important stratum related to the geographical distribution of the households has been included in the process. The main reason for adding this stratum was to capture the county distribution of Ukrainian households that received temporary protection, since households' needs and experiences vary across Romania. Therefore, for better assessing and understanding the needs, the sample aimed to capture a diversity of voices and experiences and offer a comprehensive overview of the Ukrainian living experiences in Romania. The interviews were conducted in 31 counties in Bucharest⁵, based on the geographical distribution of the households. As the map (see Map 1) below indicates, the largest numbers of households are in Bucharest (34%), Constanta (27%), Suceava (13%), and Brasov (7%), followed by other medium to large cities from Romania (Sibiu, Cluj-Napoca, Iasi, Galati, Baia-Mare, Ramnicu-Valcea, Bistrita). While in the sampling process, no gender strata were added, by the end of data collection, the gender distribution from the UNHCR dataset was in line with the existing MSNA results.

By the end of the data collection process, there were 1,222 respondents, including a total of 3,485 household members (one component of the survey includes details about the household, seen as a unit of analysis, and the other component offers details about each member of that specific household; In this case, through the survey, there were collected data about 3,485 household members).

in the community for participation in mental health research, BMC Medical Research Methodology.

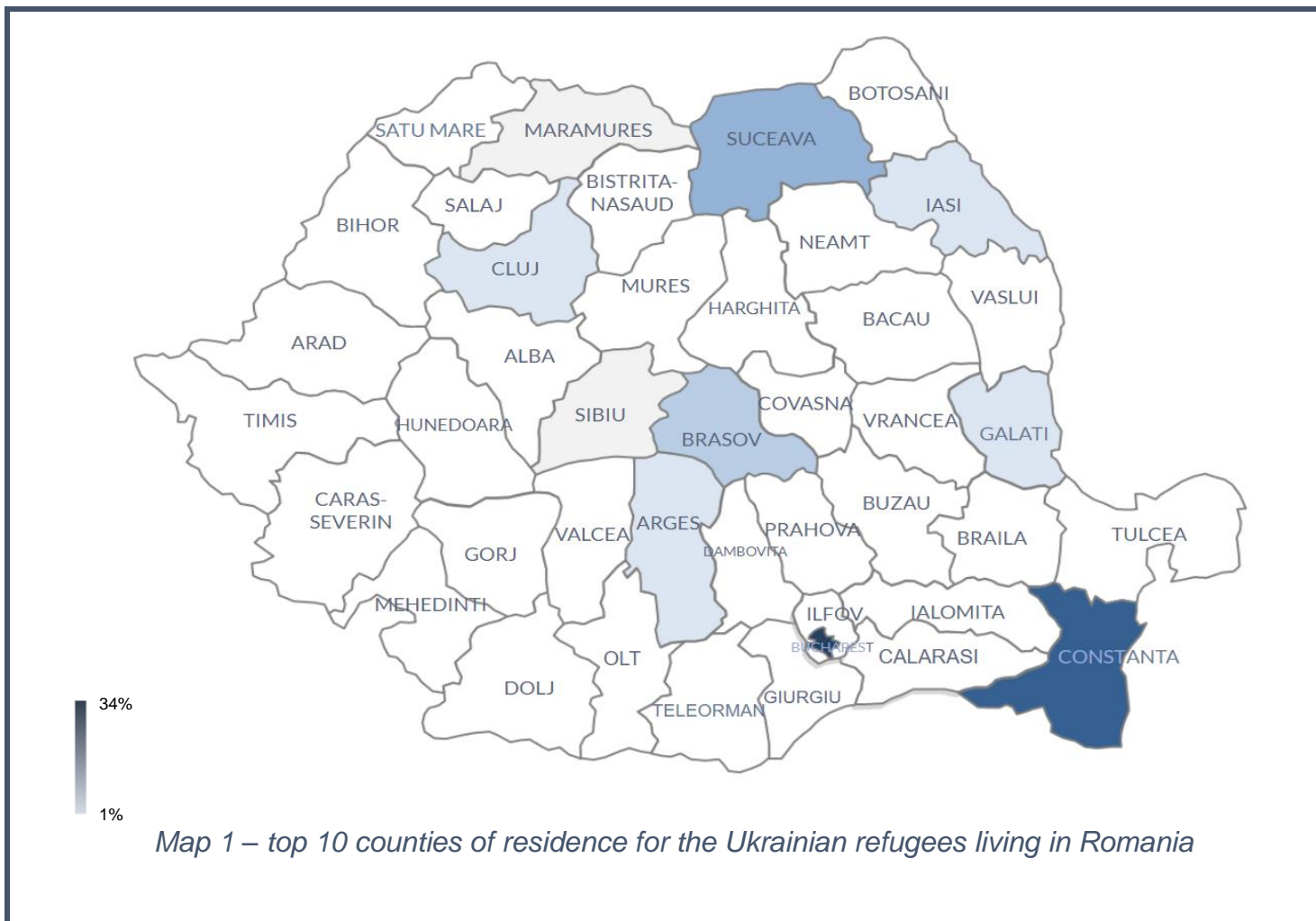
⁵ Romania is administratively divided into 41 counties and the capital city of Bucharest, where the largest number of refugees are located (34%).

² UN Secretariat, (2005), Available at: <https://unstats.un.org/unsd/demographic/sources/surveys/handbook23june05.pdf>

³ The UNHCR dataset includes the segment of the Ukrainian refugees actively seeking humanitarian assistance.

⁴ Enticott et al. (2017), *A systematic review of studies with a representative sample of refugees and asylum seekers living in Romania* – MSNA 2023

Therefore, the sample is representative to the existing UNHCR dataset and in-country comparisons are suitable if needed.

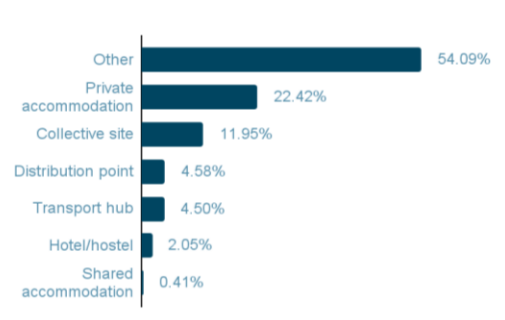


Data Collection

The questionnaire was the result of Inter-Agency consultations and was adapted to the Romanian context. Generally, the interviews were conducted face-to-face (75% of them). As an exception, some interviews were conducted online via video calls. The situations where interviews were conducted online were very well documented and included the counties where the number of respondents was very small (less than ten households per county) and specific cases, such as households with single parents with small children under their care, focal points that worked long hours or night shifts, households located in remote areas where access was very difficult for the enumerators and other specific situations that did not allow face-to-face discussions. In terms of the place where

the interviews were conducted, the enumerators have gathered data using a variety of places for meeting, from the spaces where Ukrainian households are located (collective sites, private accommodations, hotels) to other meeting points, such as transport hubs, NGO headquarters, university offices, etc. As Graph 1 describes, more than 65% (54.09% took place in other locations such as parks, community centres, coffee places, university offices, etc., 4.58% in distribution points, 4.5% in transport hubs, 2.05 in hotels) of the interviews took place outside the respondents' household, almost 12% in collective sites and 22.4% in their private accommodation. While the sampling process did not include a stratum on location due to a lack of information on it, the enumerators reached a comfortable number of households located in collective sites, in accordance with existing estimates.

Graph 1 – % of the place where interviews took place (N=1222)



The data collection was carried out by the Centre for Comparative Migration Studies (CSCM) and the International Organization for Migration Romania (IOM) from July 25, 2023, to September 25, 2023, with the involvement of 28 bilingual enumerators (two men and 26 women). All the enumerators participated in a face-to-face, two-day workshop on 17 and 18 July, where they assisted in sessions on using the Kobo platform, how to communicate with the respondents and with the coordinating team, and what is the protocol for conducting the interviews. Additional online meetings have been organised for further clarifications on the data collection tools, data protection protocols, and practical sessions to test the accuracy of the questions and the function of the online application. The enumerators have constantly contacted the partner organisations, signalling challenges encountered during their fieldwork activities and asking for guidance.

Data Quality Assurance and Analysis

Quality of data was assured through a set of procedures and mechanisms. Firstly, the working team tested the Kobo platform in the pre-data collection period. Secondly, all the enumerators participated in the two-day face-to-face training, where they also got familiarised with the questionnaires. In addition, a system of tracking the activity was put in place and constant monitoring was conducted. Lastly, the research team randomly selected respondents, called them back, and verified the accuracy of the data recorded with them. The data analysis was conducted in Excel, SPSS and R. Both the preliminary results and the final report were elaborated by CSCM in close consultation with UNHCR and IOM.

Limitations and Disclaimers

Since the sample is representative of the UNHCR dataset, the interpretation of data should consider specific

limitations. Firstly, the UNHCR dataset contains a higher proportion of vulnerable people than the Ukrainian population at large, and this may lead to a bias in the overrepresentation of the groups with specific needs or groups actively seeking assistance. Moreover, some percentages in terms of age and gender might differ for the Temporary Protection⁶ information due to the fact that this MSNA refers to the selected sample, and the temporary protection data refers to the cumulative number of permits issued since 18 March 2022. Secondly, the survey was conducted during the summer months, which overlapped with Romanian and Ukrainian school holidays and the general working vacation. Among other reasons detailed below, this aspect impacted the reachability of the households and the need to contact more focal points to reach the numbers assumed in the sample. On average, one in five people responded to the survey. Still, for Constanța and Suceava, the response rate was even lower, one in 10, due to the higher mobility of people in these locations. For this reason, a larger number of contacts have been randomly selected and interviewed. Thirdly, there is a high non-response rate to the sensitive questions on income, mental health and psychosocial wellbeing and protection. Even if the enumerators spoke both Ukrainian and/or Russian, some topics remained poorly answered. Fourthly, two specific regions (Suceava and Constanța), that are in the proximity of the Ukrainian border and with an important number of residents, pose some challenges in the data collection process. Potential respondents went to Ukraine during the summer months or are involved in a rather constant movement between Romania and Ukraine. Moreover, an important number of refugees left Constanța at the end of the 50/20 programme (the first iteration of the Government assistance programme for housing and food). Finally, as per other data sources, the number of men is underrepresented in the sample and reflected in the results due to a combination of reasons: the highest proportion of declared focal points are women, and until recently, only certain limited categories of men between 18 and 60 years old could leave Ukraine under strict rules. In addition, men are more reluctant to have their responses officially recorded, and finally, the population of Ukrainian refugees is mobile; hence it is very difficult to have their movement accurately registered. However, all the limitations mentioned above do not represent a barrier in the process of a thorough assessment of the Ukrainian household needs.

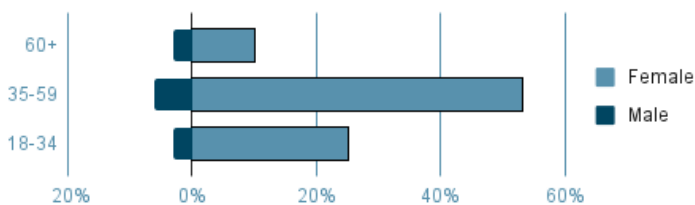
⁶ <https://data.unhcr.org/en/dataviz/234?sv=54&geo=10782>

Findings

Respondent profile

The survey focused on adults, with the largest portion (59%) belonging to the 35-59 age group, followed by the 18-34 group (28%) and those aged 60 and above (13%). Most of the participants were female (88%, as illustrated in Graph 2). A crucial criterion for survey inclusion was the Ukrainian residency prior to, with 100% of respondents meeting this requirement. Additionally, less than 1% of participants reported holding citizenship from other countries.

Graph 2 – % of respondents by gender and age (N=1,222)



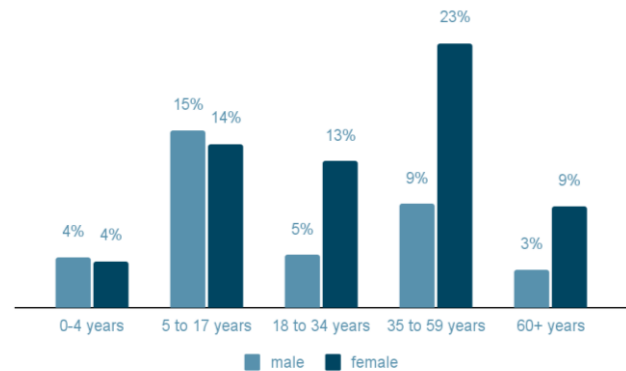
The interviews were conducted in 32 counties, encompassing Bucharest. A significant proportion of respondents resided in the county where the interview was conducted. Bucharest, known for hosting numerous refugees, accounted for the highest percentage of interviews (34%, as depicted in Map 1).

Household profiles

The average household size within the sample is 2.85 members per household, slightly exceeding the figure reported in the 2022 MSNA (2.56)⁷. The majority of households are situated in urban areas.

Sixty-three per cent of household members are female, encompassing both women and girls. Additionally, 38% of the population consists of children, including boys and girls, while 12% are older refugees aged 60 and above (see Graph 3).

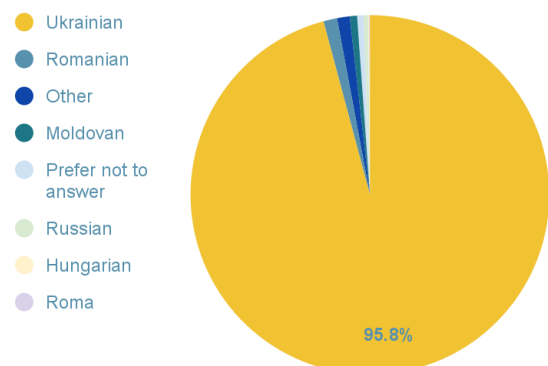
Graph 3 – % of household members by gender and age (N=3,485)



88% of the surveyed households are headed by a female, 12% by a male and 13% have an older person as the head of the household (60 years+). The predominant age group among household heads is 35-59 years, accounting for 59% of the total. These data reflect the sample, the use of the UNHCR dataset for reaching the respondents and the manner in which respondents decide to declare aspects related to their household structure and composition.

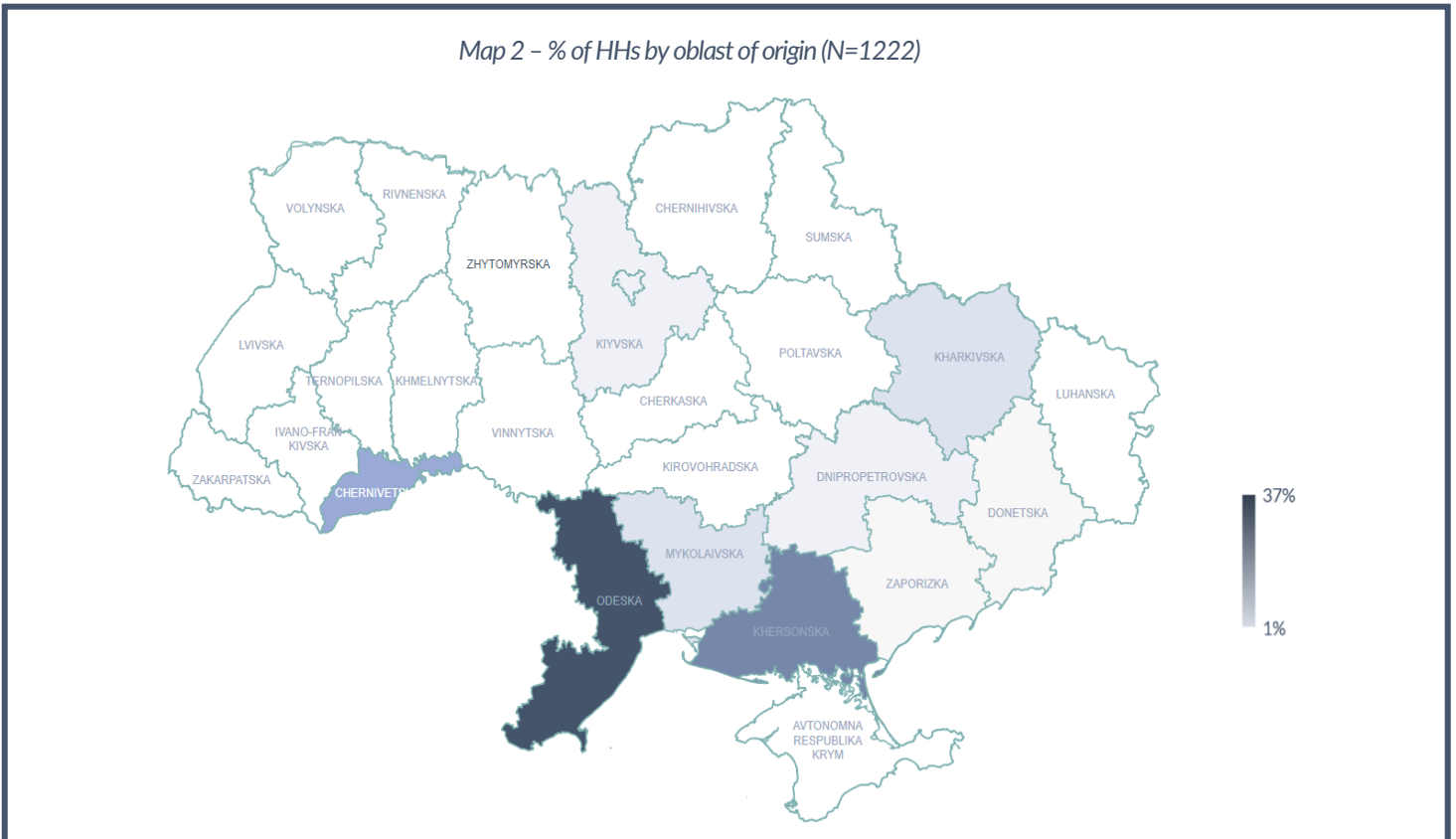
Regarding ethnicity, 96% of respondents identified themselves as being of Ukrainian ancestry. Additionally, 1.2% identified as Romanian, 0.7% as Moldovan, 0.4% as Russian, and 0.1% as Hungarian or Roma. Another 1.1% identified with other ethnicities, and 0.6% chose not to provide an answer (see Graph 4).

Graph 4 – % of HHs by ethnic background (self-identified) (N=1222)



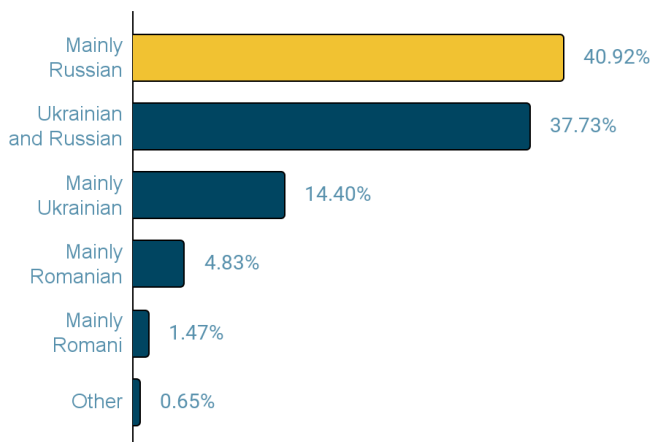
⁷Romania Multi-sector Needs Assessment (December 2022)
Available at: <https://reliefweb.int/report/romania/romania-multi-sector-needs-assessment-december-2022>, p.14

Map 2 - % of HHs by oblast of origin (N=1222)



The primary language for the majority of refugee households in Romania is Russian, with 41% using it exclusively and 38% combining it with Ukrainian. Approximately 14% use only Ukrainian, around 5% use Romanian, and 1.5% primarily use Romani (see Graph 5).

Graph 5 - % of HHs by main language spoken at home (N=1,222)



Most Ukrainians residing in Romania hail from the border regions, like Odeska oblast, constituting approximately 37% of the respondents. Following closely are Ukrainians from the Kherson region, comprising about 15%. Those from the Chernivtsi region make up 10%, while representatives from the Mykolaiv and Kharkiv regions collectively account for around 6% of all respondents (see Map 2).

Approximately 52% of the refugees arrived more than one year ago, while around 45% arrived within the past six months. The majority of refugees, comprising 88%, reside in urban areas, with a relatively small share, 12%, living in rural areas.

Education

Under the section on education, there are two important components that address the situation of both children's enrolment into the Romanian and Ukrainian school system and the adults' overall education level.

Education represents one of the most important topics related to refugees' integration in host countries, in considering both education-related issues as far as children are concerned, including the importance of restoring refugee children into learning and routine, but also the capacity for their guardians to seek and engage in training, work, or livelihoods opportunities and integrate into the labour market as many are single mothers/parents. It is also a sector that reflects both the level of governmental preparedness and capacity for accommodating refugees, as well as refugees' willingness to adapt to a new culture and language.

It should be noted that school integration is not just about making sure that schools have physical capacities in host countries to accommodate additional children. The Ukrainian and Romanian education systems are in many ways different, with little articulation or officially recognized pathways to move from one to another. Ukraine and Romania do not share a common language and alphabet also, with Ukrainian belonging to Slavic languages and Romanian to Latin languages. These considerations are of high importance in guiding Ukrainian refugees' decisions on preferred education options, both in terms of pathways (i.e., integrating Ukrainian and/or Romanian schooling systems) and modalities (i.e., face-to-face, distance learning, blended or combined options). These speak to the set of integration support measures also that the Romanian education system should consider supporting Ukrainian refugee children's progressive integration, both in terms of enrolment, effective participation, and learning.

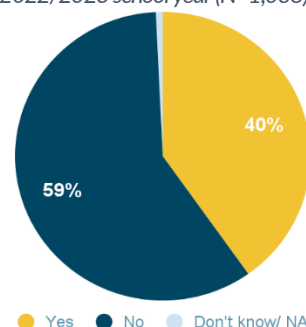
At the time of data collection for this MSNA study, in the summer of 2023, 24,806 Refugee Children from Ukraine (RCU) were officially registered with the national

education system in Romania. This was largely as a result of the reform adopted through Government decision no. 368, adopted on 26 April 2023, which introduced a conditionality linked to compulsory education, requiring enrolment either in Romanian schools or in alternative face-to-face education programmes - or so-called 'education hubs' - registered with County School Inspectorates, in order for RCU and their families to benefit from humanitarian support and financial assistance offered by the Government of Romania (the "new housing and integration support program" scheme). 61 education hubs were then officially registered also with the Ministry of Education in Romania, providing alternative learning opportunities, including learning continuity by the Ukrainian curriculum to reportedly 8,129 RCUs⁸.

As per the sample used for this MSNA, the total percentage of children represents 38% of the Ukrainian population. This percentage indicates a rather important share of a young population that needs special attention in terms of programmes and services. The school age group (5-17) represents around 30% of the population and the remaining 8% falls into the category of 0-4 years.

As the data indicates, 40% of the school-aged children (5-17 years old) were enrolled in school in Romania during the 2022/23 school year (see Graph 6). This percentage indicates a significant improvement compared to last year's data, when just around 10% of the school-aged children were reportedly enrolled in the Romanian system⁹.

Graph 6 - % school-age children whose school attendance was reported in the host country in the 2022/2023 school year (N=1,038)



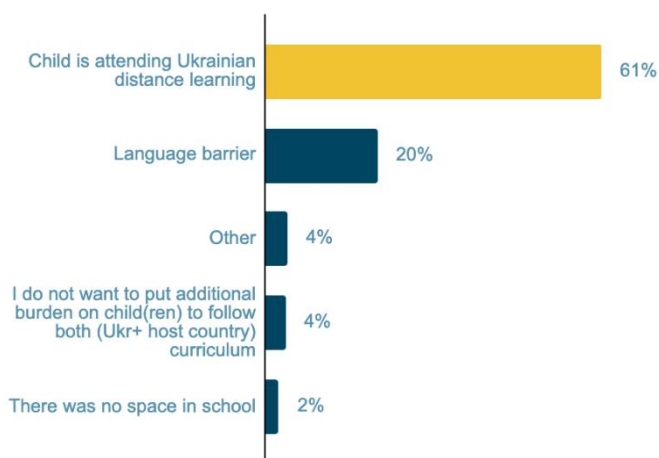
Among those who were not enrolled in the Romanian

⁸ UNHCR Inter Agency Operational Update Romania, June 2023, pg. 5.

⁹ Romania Multi-sector Needs Assessment (December 2022) Available at: <https://reliefweb.int/report/romania/romania-multi-sector-needs-assessment-december-2022>, p.41

education system, the primary reasons for it were the fact that the child was attending distance learning in Ukraine (61%), the language barrier (20%), and not wanting to put an extra burden on children (4%) (see Graph 7). Based on these figures, there is a clear preference for the Ukrainian distance learning programmes and caregivers' desire to continue the educational path in a familiar system, where children can use their mother tongue. 2% also reported that their request to enrol in Romanian schools was not accepted due to lack of space.

Graph 7 – primary barriers for not enrolling children in Romanian school system (N=1,038)



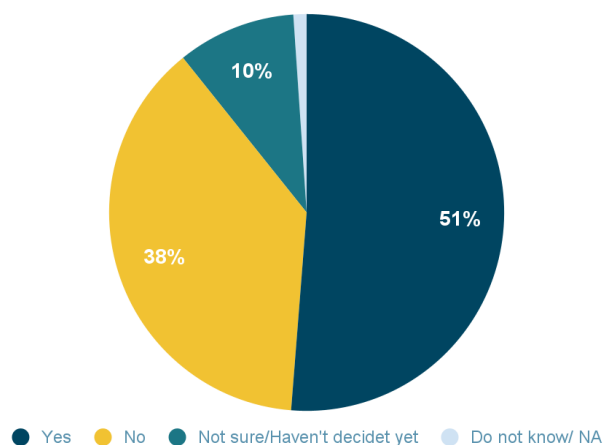
The percentage of children enrolled in the Romanian education system (nursery, kindergarten, and schools) in the 2023/2024 school year shows an improvement from the previous year – 51%, while about 10% have not decided on this issue yet. 38% of caregivers did not plan to enrol their children in Romanian schools in the next school year (at the time of data collection)¹⁰ (see Graph 8).

Among the school-aged children, almost 80% were at the time of data collection accessing distance learning programmes in Ukraine (see Graph 9). It is important to mention that more than one-fifth (22%) of the school-aged children are enrolled both in the Romanian education system and in the Ukrainian distance learning programme,

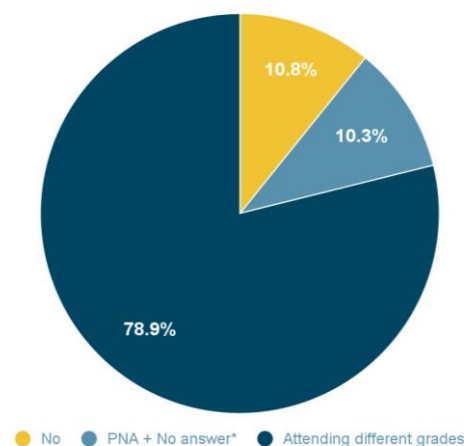
¹⁰ If filtered only for school aged children, the percentages remain quite the same: 50.7% of children are enrolled in the 2023/2024 school year and 38.8% were not at the moment of data collection - the months of July, August and September 2023.

a fact that may lead to an extra burden for these children but also indicates their caregiver's preference for offering children the options to continue with either education system depending on how the situation evolves. Moreover, 49%¹¹ of the school-aged children participated in the school year of 2022/2023 in other forms of education (non-formal education provided mainly by non-profit organisations).

Graph 8 – % of children enrolled into the host country education system (school/kindergarten/nursery) for the next school year (2023/2024) (N=1,176)



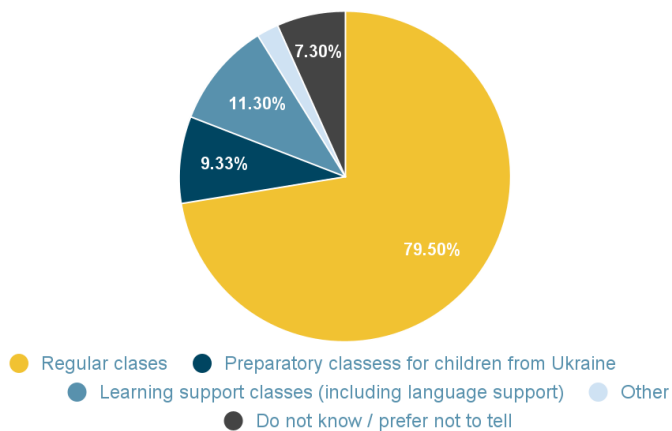
Graph 9 – % of school-aged children accessing Ukrainian distance learning (N=1,038)



¹¹ The percentage was calculated based on the responses with yes received at the question: *Did your children participate in other forms of education (excluding Romanian school and online education) in the school year 2022/2023?*. There were 304 responses with yes out of a total of 617 responses.

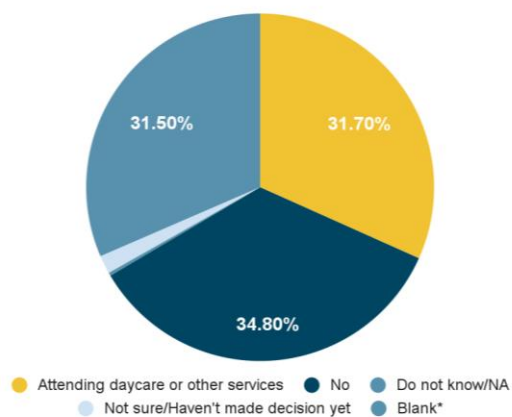
In terms of the type of classes attended in Romania, almost 80% attend regular classes, 9% attend preparatory classes and 10% attend learning support classes (see Graph 10).

Graph 10 - % of children attending classes by type (N=964)



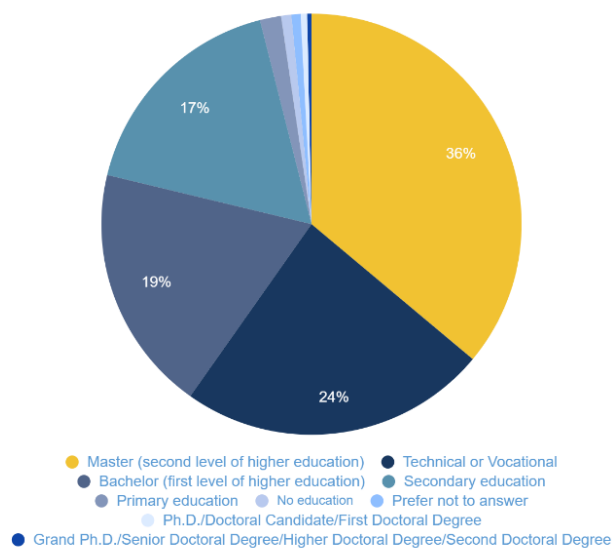
From the category of early education (0-4 years), around 32% of children are attending daycare and other forms of early education. Around 35% are not enrolled in early education and for 31.5%, mostly aged 0 and 1, there was a non-response rate.

Graph 11 - % of children attending early education programmes (N=296)



In terms of adults' education achievements, most of the surveyed population - the respondents and their family members included - has a tertiary education, with over 56% having at least a Bachelor's degree. Looking only at the heads of household, 81% of the respondents have either a technical or vocational certification or a Bachelor's degree. The common level of education achieved is a Master's degree (36%), followed by technical or vocational studies (24%), bachelor's degree (19%) and secondary education (17%). A small percentage of 2% has primary education studies and 1% has no form of education. Another 1% declined to give an answer. The figure contains information about the level of education of those members of the investigated households who are above 18 years old. Because this question encompasses information not only about the respondent's education, but also that of their family members, the total population of study is 2,151 subjects (See Graph 12).

Graph 12 - Highest level of education achieved (N = 2,151)

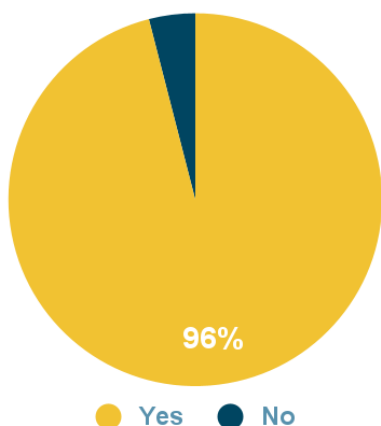


Protection

Legal Status and Safety and Security

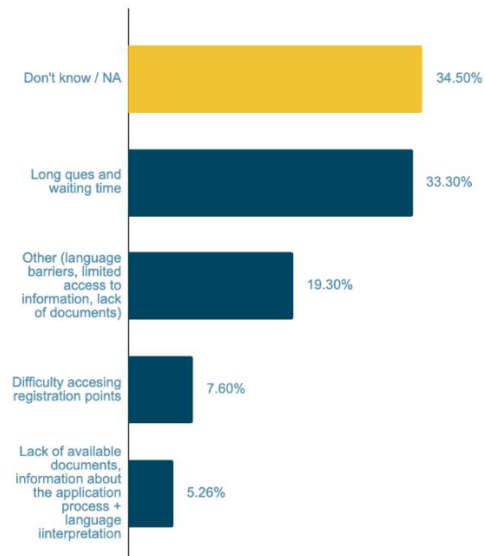
According to the interviewed refugees, 96% of the Ukrainian households have obtained temporary protection (TP) from the Romanian state (see Graph 13), and only 0.14% of the households have at least one member without an ID. Moreover, reportedly 93.6% of the children aged under five years have legal documents, and their birth has been registered with a civil authority. However, the existing data do not show whether the birth certificate was obtained in Ukraine or Romania. Having a clear legal status and valid documents represent one important milestone in accessing other support programs and services in Romania.

Graph 13 – % of HH who have obtained temporary protection or a similar scheme (N=1,222)



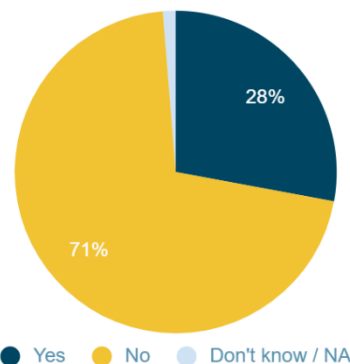
When respondents were asked if they experienced any difficulties during the TP application process, 94% declared that they did not encounter any issues. However, for the ones that had challenges, long queues and waiting times, along with difficulties in accessing the registration points and access to information, seem to represent the top problems (see Graph 14). As data from the field indicates, most of the challenges were encountered in early 2022, before the temporary protection processes were properly implemented and only remotely there were specific issues in 2023.

Graph 14 – Top main difficulties experienced during the application process – MCQ (N= 171)



In terms of refugees' feelings of safety and potential social tensions with the local population, there are several important aspects to discuss. Firstly, 28% of respondents stated that they experience tensions in personal communication with Romanian citizens (see Graph 15) or through other channels such as social media and television. As more than 1 in 4 Ukrainian refugees experienced verbal aggression and discriminatory behaviours, it is important to consider actions that mitigate these social tensions before they can be escalated in other forms of violence or can be weaponized in populist discourses.

Graph 15 – % of households declaring tensions with Romanian citizens (N=1,222)

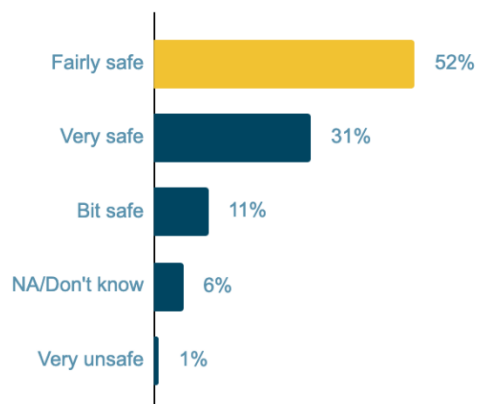


Equally important, when respondents were asked if they are aware of a set of services in the area they are residing (from social services to legal and reproductive and mental health), 14.5% of respondents did not know of any of the services enumerated and 7% could not name any service

from the list¹². The most frequent responses indicated an awareness of the existence of state social services for families (17.5% of the responses), safe spaces, protection and education hubs (21.4% of the responses) and legal services (12.6% of the responses).

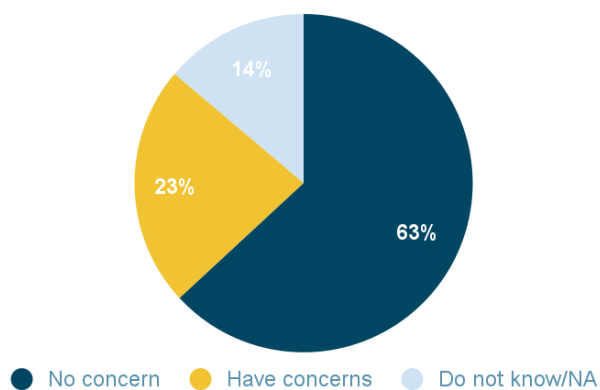
Secondly, exploring how safe refugees feel in the host country is another important aspect. 83% of the respondents declared feeling very safe and fairly safe and only 1% felt very unsafe. This indicates that, there are no important safety issues for Ukrainian refugees across Romania. However, since this is a sensitive topic, there is a chance of abuse happening and not being mentioned or reported.

Graph 16 – % of respondents reporting feeling safe walking alone in the neighbourhood after dark (N=1,222)



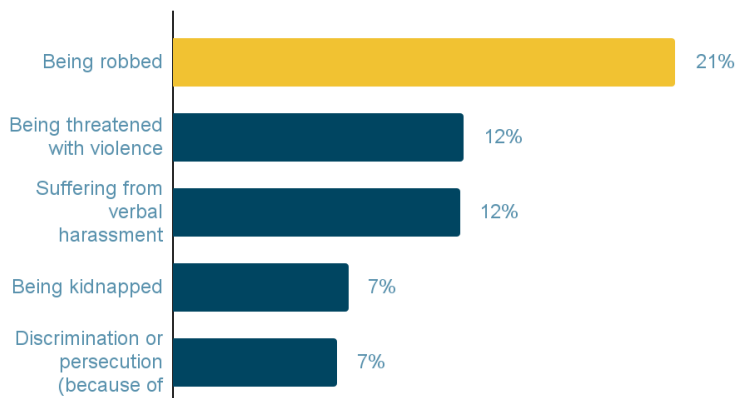
Regardless of the respondent's gender, we sought their opinion on the situation regarding the security and safety of women. Concerning safety and security issues in the community, 23% expressed apprehensions specifically about the safety of women (See Graph 19).

Graph 19 – % of HHs who have concerns regarding the safety/security of women (N=1,193)



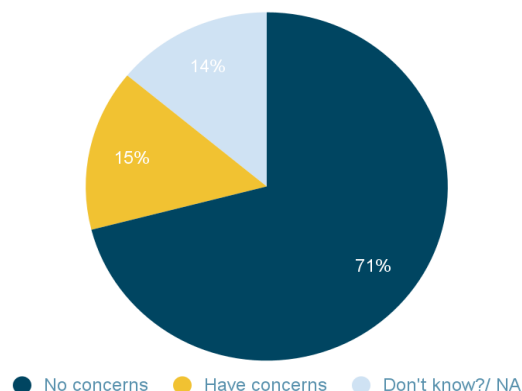
These concerns predominantly revolved around issues such as being robbed (21%), experiencing threats of violence (12%), facing verbal harassment (12%), and being kidnapped (7%). Discrimination or persecution, whether based on ethnicity, status, or gender identity, was mentioned by 7% of the respondents (Graph 20).

Graph 20 – Top 5 safety / security concerns for women reported – MCQ (N=643)



Even though women are disproportionately more likely to be targets of various types of crime, the results reveal that significant safety concerns are also prevalent among men. Specifically, 15% of the surveyed households expressed uncertainty about the existence of safety and security problems for men in their living area, and an additional 14% remained undecided. This indecision may indicate that some people harbour doubts but are hesitant to express them, possibly influenced by feelings of shame or other reasons (see Graph 21).

Graph 21 – % of HHs who have concerns regarding the safety/security of men (N=1,054)



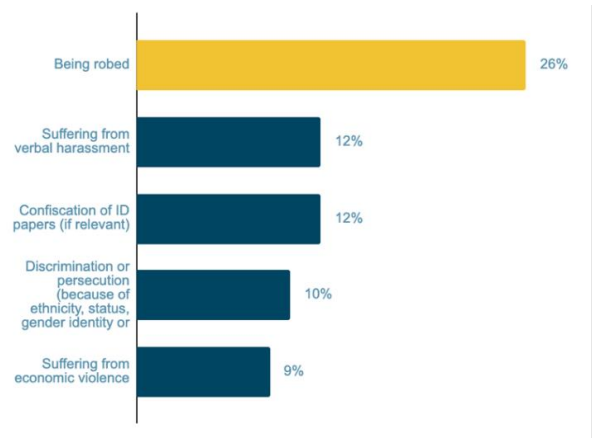
¹² The question asked if respondents are aware of a number of services enumerated in a list. It was a multiple-choice Romaniaia – MSNA 2023

question. The question did not ask if respondents use these services or how the services are running in the community.

The primary security concern against men, like the case of women, is the risk of being robbed, accounting for 26%. The second most prevalent issue is experiencing verbal harassment (12%), alongside the confiscation of a passport or similar ID, which also garnered a 12% response rate. Discrimination or persecution based on factors such as ethnicity, status, or gender identity is the fourth most common reason at 10%, followed by suffering from economic violence, contributing 9% (See Graph 22).

It is important to note that the methodology of the survey does not enable interviewing children in need of special protection, such as children in institutions, unaccompanied/separated children, children with disabilities or children experiencing other child protection violations, such as violence, abuse, neglect and exploitation (e.g. trafficking); therefore a complete assessment on child protection can be sought from specialised agencies such as UNICEF.

Graph 22 – Top 5 safety/security concerns for men reported – MCQ (N=146)



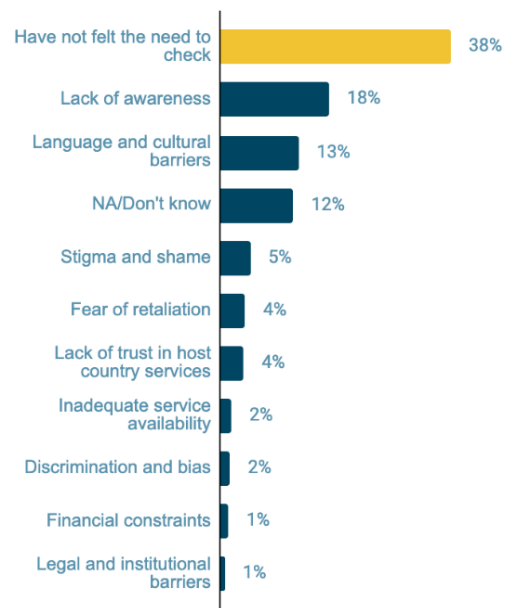
Protection concerns related to women and men

This section covers protection concerns for women and men and their level of awareness to seek assistance from specific services to address risks regarding safety and security. Some of those may be rooted in power differentials as per gender norms - yet, the data presented in this chapter, while having some interlinkages to GBV concerns, cannot be directly extrapolated only to gender-related aspects.

Given that the protection concerns are significantly higher among vulnerable populations, including refugees, it is crucial to provide them with information on how and to whom they can report such cases. Noteworthy is the fact that reporting incidents refers here to general safety concerns, and not only GBV-related incidents faced by survivors.

Acknowledging that survivors of violence often turn to those they trust the most, such as parents or close relatives, it becomes imperative to ensure they are informed about reliable assistance services available in their place of residence.

Graph 18 – Main barriers for accessing GBV services – MCQ (N=643)

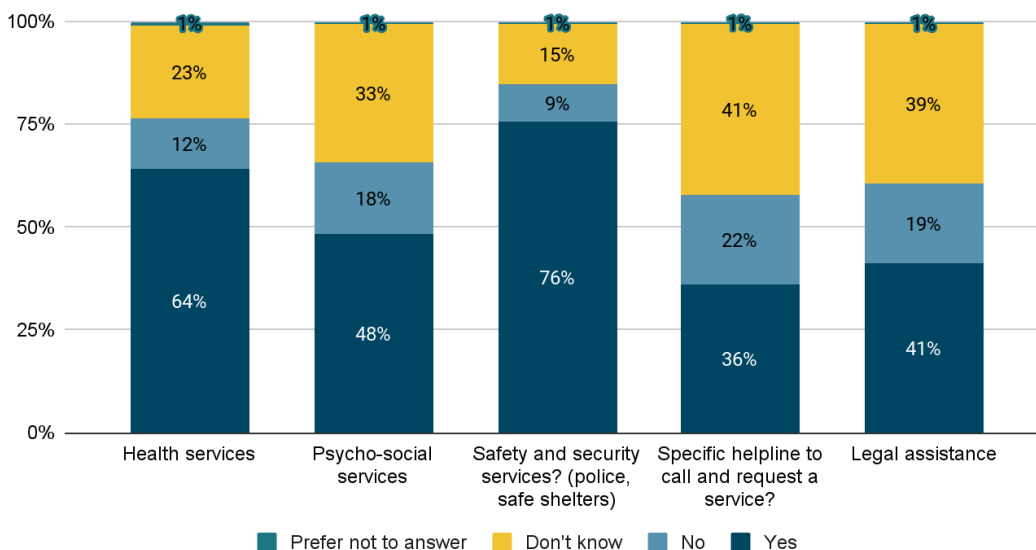


This knowledge can play a vital role in facilitating timely and effective support for Gender-Based Violence (GBV) survivors. Derived from the results obtained from participants, a clear trend emerges, indicating that security and safety services (police, safe shelters) are the most trusted channels for reporting incidents of general safety (76%). This is followed by awareness of legal assistance (64%) and psycho-social support (48%). About 41% of the

respondents reported having knowledge of contacting legal services, while the lowest score was observed for specific helplines (, with around 36%, noting that this level of awareness does not relate to only GBV-related aspects of these services or helplines (Graph 17).

Common barriers in accessing GBV services include a lack of perceived need, insufficient awareness, language barriers, and the presence of stigma and shame (Graph 18).

Graph 17 - % of HHs, regarding their knowledge about specific services for reporting GBV

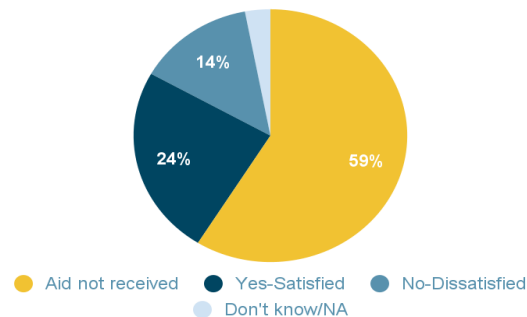


Accountability to Affected Populations

The topic related to the aid received by the refugees generated vivid debates, as data were collected after the 50/20 governmental programme for housing and food had been discontinued and then relaunched under a new format. Therefore, when asked if households were satisfied with the aid received in the last three months prior to the data collection, almost 59% of the respondents declared that they did not receive any aid (see Graph 23). This high percentage can be explained by the Romanian Government's decision to modify the structure and the operation of the assistance programme for refugees from Ukraine. The percentage of people who did not receive aid has almost doubled from last year¹³, indicating that there is a need for a special focus on this particular area¹⁴. To the same question (satisfaction with the aid received), 24% of the households declared they

were satisfied with the benefits, and 14% were not, a percentage that is again increasing in comparison to last year's values - 6%. However, considering the new iteration of the government assistance programme and the delay experienced at the time of the data collection, the results should be interpreted with this in mind.

Graph 23 - % HH that are satisfied with the aid they received (N=1,222)

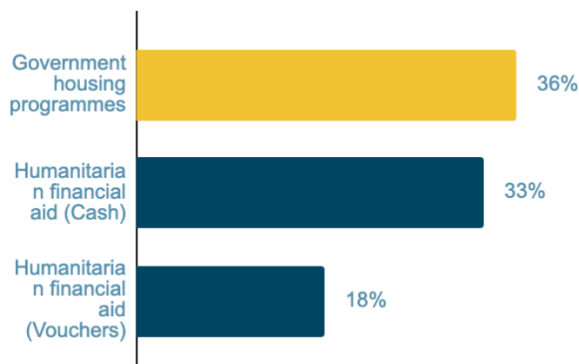


¹³ MSNA (2022), pg. 49
<https://reliefweb.int/report/romania/romania-multi-sector-needs-assessment-december-2022>
Romania - MSNA 2023

¹⁴ The question did not ask whether refugees needed specific aid.

As for the main reasons for dissatisfaction, respondents complained about the government's 50/20 housing programmes (36% of the responses) and the changes made to this programme, followed by the insufficiency of humanitarian financial aid in the form of cash and vouchers (see Graph 24).

Graph 24 - Top 3 programmes that generated dissatisfaction with humanitarian aid (N=289)



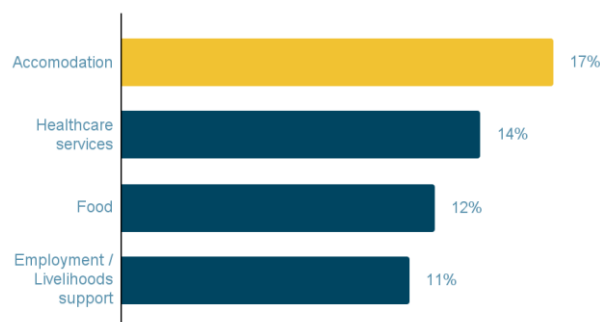
When asked about general reasons for dissatisfaction with the aid received, respondents (55% of them) indicated they did not receive the aid on time and the assistance received was insufficient (20%), indicating the areas where services need improvement.

While respondents indicated reasons for dissatisfaction with the aid received or the absence of it, a large proportion (82%) of them indicated they were satisfied with the activity of the aid workers, 8% were unsatisfied, and another 10% did not know or prefer not to answer.

Among the reasons for dissatisfaction with the aid workers showing a lack of empathy and respect for the local cultures and the current situation (23% of the responses), including disrespectful behaviours (21% of the responses), assistance is not enough, not useful/poor quality (13% of responses) or aid workers did not speak their language (11% of responses) seem to be the most important aspects mentioned. This fact may indicate the need for further training for aid workers in dealing with sensitive situations during aid delivery.

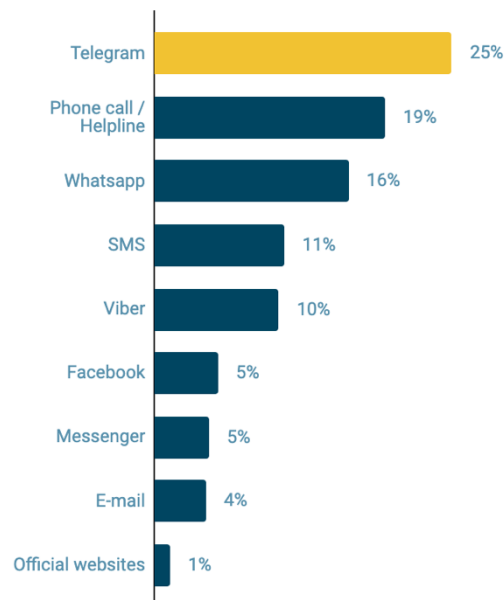
When asked about their household needs (Graph 25), respondents indicated that accommodation (17%), healthcare (14%) and food (12%) represent the most significant priorities and needs. While data are slightly different, the reported needs follow a similar trend to the ones identified in 2022.

Graph 25 - Top four most commonly reported priority needs, by % of HHs - MCQ (N=3,176)



While the dynamics of receiving aid have changed between 2022 and 2023, respondents indicate that they still maintain communication channels with the aid providers. Among the channels mostly used, Telegram remains the most preferred (25%), followed by helplines and phone calls (19%) and WhatsApp channels (16%). Through these channels, feedback can be constantly provided to aid workers about the household's changing needs and the services received (see Graph 26).

Graph 26 - Preferred channels of providing feedback to aid workers about the aid received - MCQ (N=2,517)



Telegram also remains the most important channel (30%) for receiving information among Ukrainian refugees. The popularity of Telegram can be explained by the fact that the platform was used more in Ukraine than other apps and channels, and it offers the possibility of generating communication channels. As the respondents indicated,

other channels of receiving information are WhatsApp, helplines, Viber and Facebook (see Graph 27), and only 5% of the respondents prefer to use official websites for information. However, 28.3% of the households indicate they experience challenges in accessing more granular, process-oriented, and localized information relevant to their needs.

Around two-thirds of the respondents (66.5%) reported that they know how to access safe and confidential community-based feedback mechanisms and 59% of them consider they received appropriate responses to the issues they have signalled. This indicates that communication channels within aid workers and other community services are rather open and effective, and refugees use these instruments when confronted with problems.

Graph 27 – Preferred means (channels) of receiving information – MCQ (N=2,542)



Disability

Specific forms of protection are needed for people with disabilities. Across the sample, 6.85% (N =239) of the household members have a form of disability (level 3 of disability¹⁵). In a more granular understanding and looking at the type of disabilities, out of the 6.85%, 40% of the individuals have a visual impairment, 24.9% indicated having multiple disabilities, 4.6% declared having a hearing impairment, 21.3% are in the limited mobility category, 3.8% have a cognitive impairment, 2.5% are unable to care for themselves, and 2.9% have challenges in making themselves understood or understanding things. On a different note, if we consider the household as a unit of analysis, 17.3% of households have at least one member with a level three disability.

Households that declare having at least one member with a disability are in a special category of vulnerability, as they may need constant medical assistance and socio-economic support. Within the sample, from the 28% of the household members who had healthcare needs in the last 30 days prior to data collection, 25% also had a form of

disability. Also, when asked about the social protection benefits, they receive in Romania, only 3% of the households received some form of social assistance. Out of these 3%, 8.3% are households with members with a disability. However, these percentages need to be treated with caution, as for all the sensitive questions the non-response rate is very high, and the actual need may not be reflected clearly through these data. When asked if they receive benefits from the Ukrainian government, the percentages are higher: 32 % of the households declared receiving social benefits (parental benefits, unemployment, age pension or other vulnerability benefit) and 4.7% declared receiving disability benefits¹⁶. The higher percentage can be explained through the fact that these households are more familiar navigating the Ukrainian procedures and bureaucracies than the Romanian system, and that the process for recognition of disability status in Romania is quite complex and lengthy. In addition, access to information remains a challenge. As previous data indicates, information from official channels remains limited.

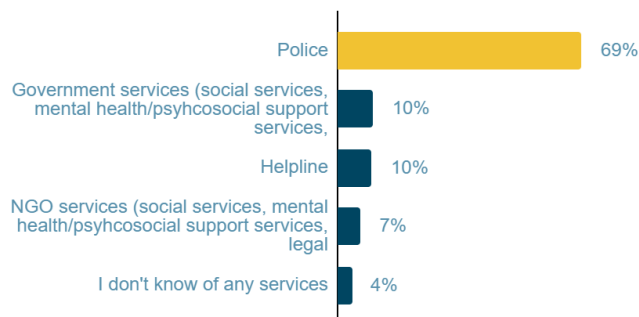
¹⁵ Level 3 of disability is computed based on the respondents who answered “a lot of difficulty” and “cannot do at all” in the survey. The criteria for level 3 of disability was established by the Washington Group on Disability Statistics.

¹⁶ When respondents were asked about their household sources of income in the last 30 days, 15% of the HH mentioned the Ukrainian social protection benefits as their source.

Child Protection

Children are one of the most vulnerable groups within a society. Therefore, child protection needs are specific and complex, and policies usually involve multisectoral approaches. According to the sample, 68% of refugee households living in Romania have at least one child. As almost half of the households have children under their care, a special focus should be given to their needs: shelter, food, education, health, and security, among all the other aspects largely discussed in the report. In an in-depth analysis, looking only at the households with children (N=836), in 7.8% of the households, the children are not living with either of their biological parents¹⁷, in 3.5% of the households, the focal point is aged over 60¹⁸, and in 2% of the households, the head is aged under 25 years¹⁹. In addition, in 3.6%²⁰ of households with children, the head of the household has a level 3 disability. These findings highlight the vulnerability of children, including potential children who are separated from their families, and the need to better understand their situation in terms of ensuring safe, family-based care. When respondents were asked if they are aware of the services where they can report cases of violence, exploitation, or neglect to children, around 70% of the responses indicated police, 10% government services and 10% helplines. The question did not ask if respondents used these services in cases of violence or abuse against children.

Graph 28 – The services that respondents are aware of for reporting cases of violence, exploitation or neglect to children in the community – MCQ (N=1,617)

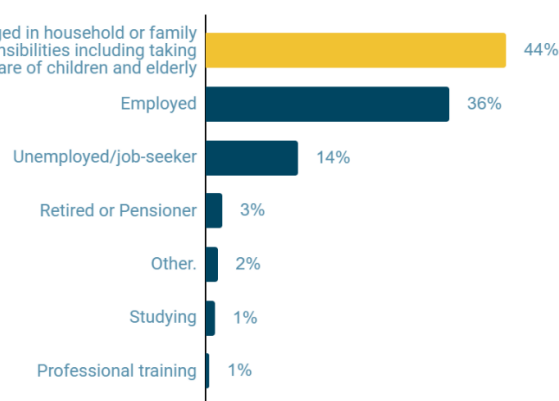


¹⁷ Or 5.32% of the total households surveyed (N=1222).

¹⁸ Or 2.4% of the total of households surveyed (N=1222).

When looking at the occupational status of the heads of households with children, as per the sample, the largest proportion of respondents (40%) declared they are engaged in household or family responsibilities, 18% are unemployed and 18% are employed, while the rest are engaged in other activities. Since women represent the biggest group of focal points in the refugee population and are also the ones that are traditionally engaged in household responsibilities, it correlates with the percentage presented above (see Graph 29).

Graph 29 – % of declared employment status of the head of HH with children – MCQ (N=1,297)



When asked about the top 3 risks faced by boys and girls under 18, the respondents identified the same risks for both categories but ranked them differently. For the boys, the order of perceived risks is as follows: bullying or violence in school (21%), family separation (17%) and worsened mental health and psychosocial well-being (17%), as it is detailed in the graph below (see Graph 30). For the girls, family separation is indicated as being the most important risk (22%), followed by worsened mental health and psychosocial well-being and bullying and violence in the community and schools (see Graph 31).

¹⁹ Or 1.4% of the total of households surveyed (N=1222).

²⁰ Or 2,53% of the total households surveyed (N=1222).

Graph 30 – % of HHs reporting on top 4 most serious risks faced by the boys under the age of 18 – MCQ(N=198)



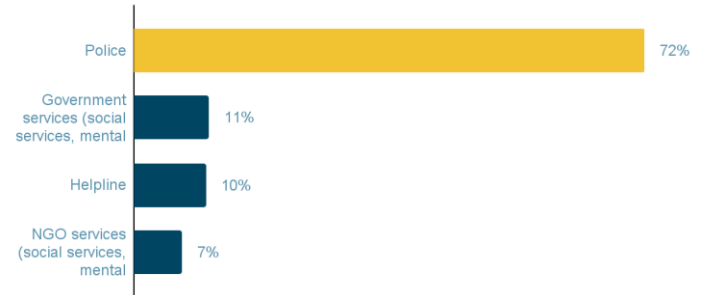
Graph 31 – % of HHs reporting on top 3 most serious risks faced by the girls under the age of 18 – MCQ (N=175)



Since bullying and other forms of violence represent a significant perceived risk, it is essential for the caregivers to know whom to address. When asked if they are aware of the services where they can report acts of aggression, almost 95% of the respondents indicated they have knowledge on this topic, and most of them (72%) indicated

police and then other institutions and services as prime line to contact (see Graph 32) not assessed the use of the service.

Graph 32 – 30 % of HHs reporting being aware of services to report cases of violence against children in the community – MCQ (N= 1,550)



Since almost half of the Ukrainian households that live in Romania have children in their composition, there is a need for special attention to their child protection needs. The data above highlights the criticality of ensuring children and caregivers have the knowledge of different child protection issues and have access to related child protection services, especially for preventing and responding to violence in schools and other settings, preventing family separation (including through addressing caregivers) and ensuring access to mental health and psychosocial support services. Details about the household composition, the caregivers' employment status, the situation of enrolment in education tracks, and specific health care needs are all aspects that need to be considered in the policy-making process.

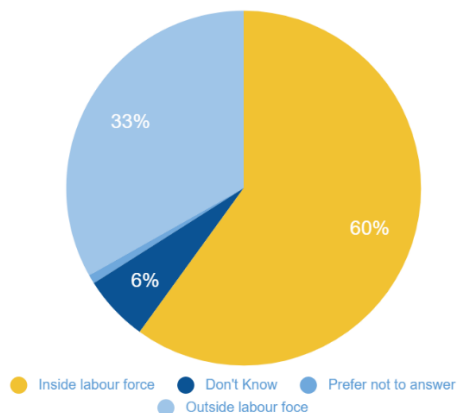
Socio-Economic Inclusion and Livelihood

Socio-economic inclusion implies that refugees who find themselves in various vulnerable categories of risk of poverty, social exclusion, or both, have the means to participate in the social, cultural and economic life according to the standard of living considered normal in the host country.

Livelihoods and inclusion

When it comes to their inclusion in the labour market, 6 out of 10 (60%) Ukrainian refugees are inside the labour force (as per the definition, inside labour force refers to all the people who work and/or are actively seeking for a job, aged 16-62 for women and 16-65 for men), while 33% are outside the labour force, meaning that they are not able to work or are not looking actively for work (Graph 33).

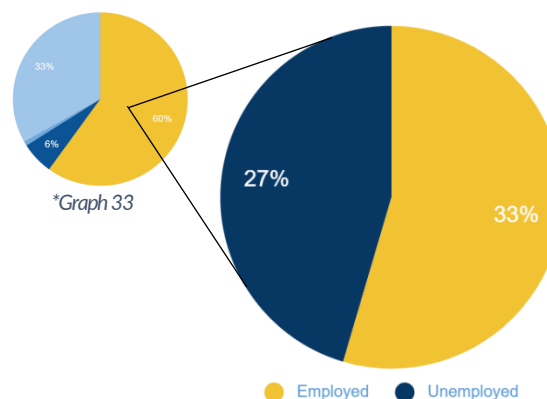
Graph 33 - Labour status of working age adults (N=1,956)



Graph 34 shows that out of those being inside the labour force (60%), 33% are engaged in paid employment (they have worked for someone in the past seven days, had run or do any kind of business, have helped care for the family). The rest of 27% are unemployed or looking for a job.

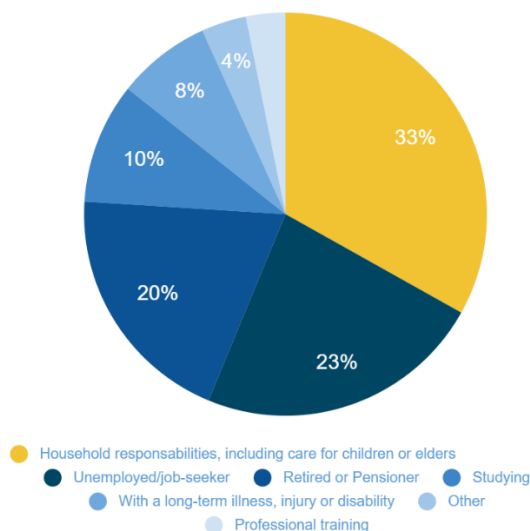
Within the larger category of unemployed, including both the refugees inside and outside the labour force (aged 16-62/65), and the ones above the age of 65, when asked about their main professional activities in

Graph 34 - Inside/ outside labour force (N=1,173)



Romania, data indicates the following distribution: there are 33% of people involved in household responsibilities, including care for children and elders, 23% are unemployed and/or job seekers, 8% are students, 20% are retired, and 8% are disabled or with long term injury (see Graph 35). A small percentage are involved in training activities (3%) or have given other answers (4%). The data in Graph 35 does not include the responses of those already engaged in working activities. The elders aged above 65 years old, were included in the analysis as some of them have mentioned engaging in some sort of hourly or unpaid labour such as caring for household members, working for one hour or more for someone else, cleaning etc.

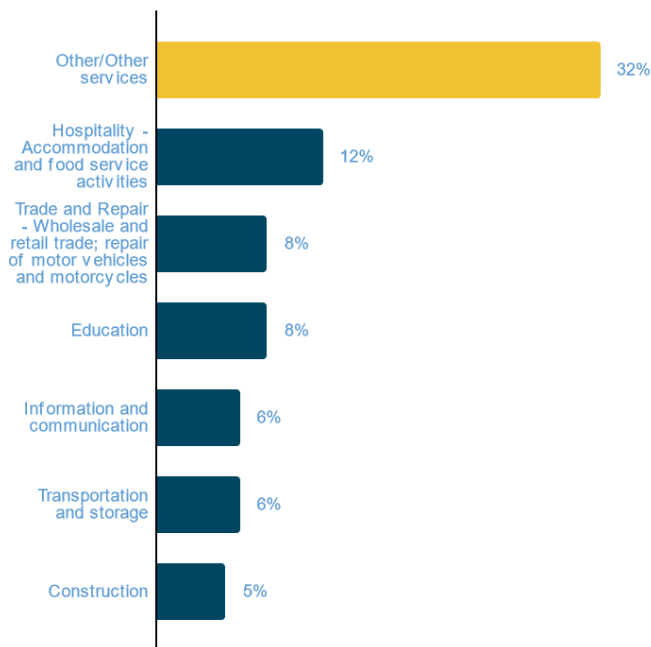
Graph 35 - Main activity of the Ukrainian refugees that are unemployed and retired but are engaged in a form of laborious activity (N=1,579)



Equally important, out of those engaged in non-lucrative activities in Romania (N=1,579), 47% have been involved in some kind of work in the past week (at the time of data collection), referring to elementary, non-contractual work, a few hours per week, such as helping look over a child for a few hours a week, help with cleaning, help with shopping and other activities of this sort. For those engaged in both contractual and non-contractual work, as well as basic labour activities, data indicates that respondents worked a minimum of 2 hours per week and a maximum of 70 hours per week, with an average of 35,1 worked hours per week.

The most common sectors of employment for the surveyed population (N=648) are service-related or other fields (32%), such as beauty, maritime industry, services, professionals, family businesses, or factories. The next most common field of employment is hospitality, with 12% of the surveyed population working in this field, followed by education (8%), trade and repair (8%), transport and storage (6%), information and communication (6%) and construction (5%), as it is shown in Graph 36. Less than 5% are working in agriculture (4%), manufacturing (4%), administrative and support services (3%), healthcare (3%) and recreational arts and entertainment (3%).

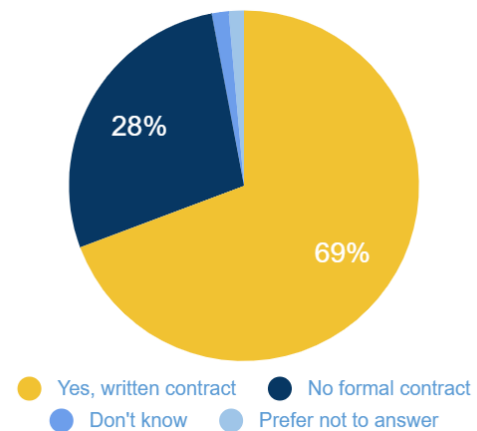
Graph 36 - Sector of current employment (N=648)



Another 6% of respondents have jobs in financial and insurance sectors, scientific or technical activities, utilities such as electricity, gas, steam, water supply, sewage or waste management, mining, public administration or real estate.

Of those working, 69% have a formal, written contract, 28% have no formal contract, 2% do not know, and 1% prefer not to answer (See Graph 37).

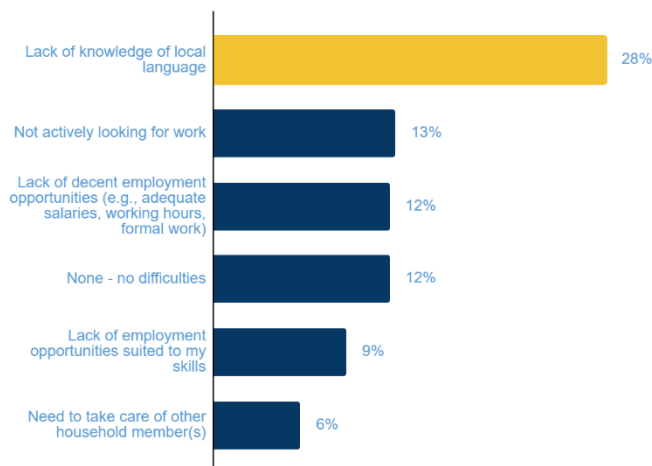
Graph 37 - Presence or absence of written working contract (N=641)



The low rate of employment aside from the high rate of Ukrainian refugees engaged in domestic responsibilities (reported by 33% of the UA nationals, as can be seen in Graph 35), is also influenced by reasons not directly related to the will or availability of the individuals to work formally.

The question regarding the main difficulties in finding work targeted both the respondents and their family members of working age (N=2,979). According to the figure presented, the main barrier to finding work is the lack of knowledge of the local language (Romanian), reported in 28% of cases. 13% of the population is not actively looking for work, while 12% have reported a lack of decent employment opportunities. Another 12% of the population reported no difficulty finding work. Other difficulties in finding employment are the lack of job opportunities suited for the skillset of the job seeker (9%) or the need to care for other household members (6%) (See Graph 38).

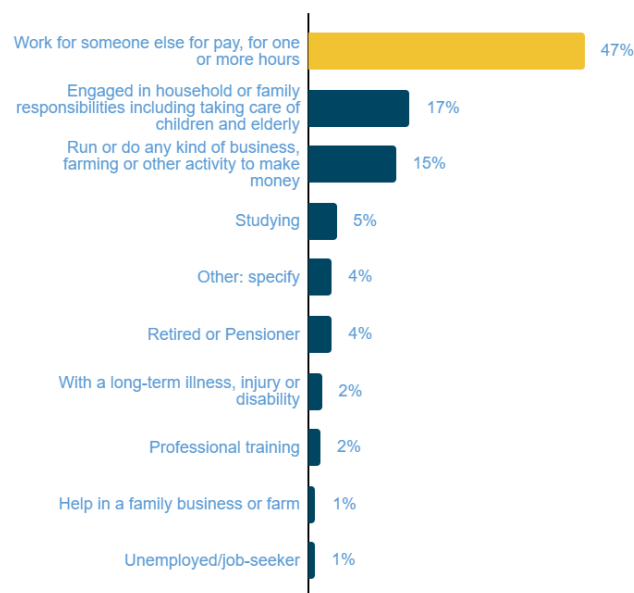
Graph 38 - Difficulty in finding work in host country (N=2,979)



Their previous working experience in Ukraine is another important component in understanding the skills of refugees. The data shows that 47% of the population were engaged in paid employment for at least one hour a day before leaving Ukraine, 17% were involved in maintaining the household and caring for children or the elderly, and 15% ran economic activities or did other forms of business, farming or other lucrative activities (see Graph 39). In comparison, in the case of 33% of the respondents and their household members, the main activities in Romania deal with managing the household and caring for family members due to the lack of similar job opportunities as in their home country. It is important to mention that the question assessing the main activities in Romania had 26% fewer answers (N = 1,579) compared to the question assessing the activity of Ukrainian nationals before leaving Ukraine. It is noteworthy, though, that out of those engaged in other non-work-related activities in Romania (N = 1,579), 47% do engage in basic activities such as working for or helping someone for a few hours a week, similarly to their activity back in Ukraine.

Other occupations mentioned that referred to the time they were living in Ukraine included managing a business (15%), studying (5%), other forms of activities (4%), retirement (4%), inability to work due to health problems (2%), training (2%) or help in family business (1%).

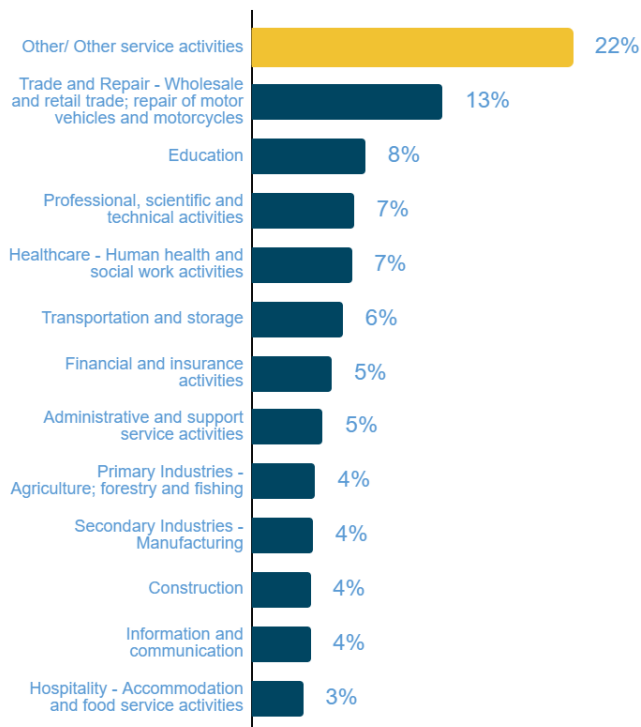
Graph 39 - Main activity before leaving Ukraine (N=1,859)



The employment sector of Ukrainian refugees in Romania (Graph 36) corresponds partially with their work experience or training, as shown in Graph 40. The main field of experience or education was reported under the category "other sector" or "other service activities" such as the beauty industry, babysitting, sales, services or cleaning, with 22% of the population of study working in this field. The next most common working sector is trade and repair, with 13% of the population working or training in this sector. Eight per cent of the Ukrainian nationals from the sample have experience in the education sector, followed by 7% who are involved in professional activities such as lawyers, accountants, or engineers. Another 7% have specialised in healthcare activities, including nurses, doctors, psychologists, or physiotherapists.

The cross-tabulation between the current field of employment (Graph 36) and their work experience or training (Graph 40) shows that, upon coming into the host country, the respondents do not always find work in the field in which they have experience or training in.

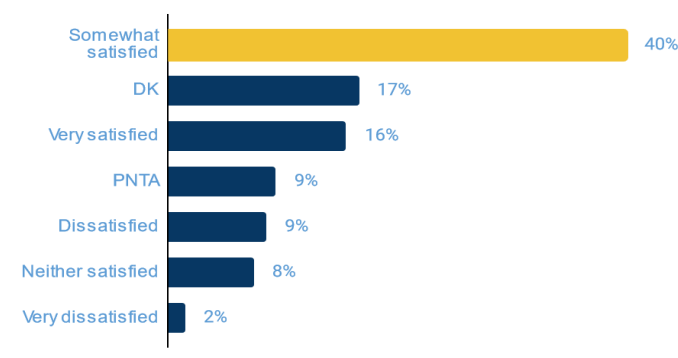
Graph 40 - Sector of work experience or training (N=1,188)



When respondents were asked if their income suffered positive or negative changes compared to the previous year, very few offered information and responded to the question. This happened due to the highly sensitive nature of the question regarding the assessment of one's income, or its positive or negative fluctuation. The number of valid answers to the question was extremely low - only 45 respondents answered out of 1222.

Even if the financial aid (pensions and social benefits) from the host country covers only 4% of the income received (for more details on this aspect, see the Economic Capacity section), the surveyed Ukrainian households' (N = 1,179) declared the level of satisfaction with the social protection system in the host country in rather a positive way (Graph 42). The data shows that more than half of the surveyed population is satisfied with the social protection available, with 40% being somewhat satisfied and 16% being very satisfied. Eight per cent are neither satisfied, nor dissatisfied, (9% are dissatisfied while 2% are very satisfied). Another 9% of the population chose not to answer this question. It is important to mention that the high level of satisfaction of the Ukrainian nationals is influenced by the 50/20 assistance program offered by the Romanian government, which was discontinued in May 2023 and replaced after a change of design with a new one.

Graph 42 - % of households that indicate their satisfaction with the social protection systems from the host country (N=1,179)

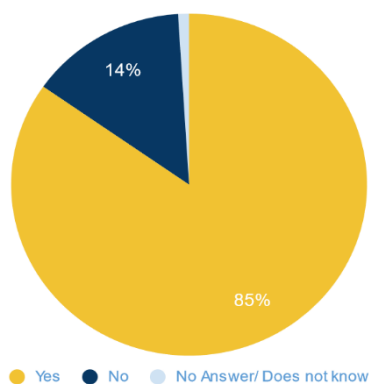


As per the sample, 66% of the households do not receive any social support from the Ukrainian government. Out of the 33% that still receive support, 20% are retired people who benefit from old-age pensions. 9% receive support in the form of parental benefits, while 5% receive disability support. Another 3% have mentioned other types of

Subsistence Allowance and Other Forms of Social Benefits

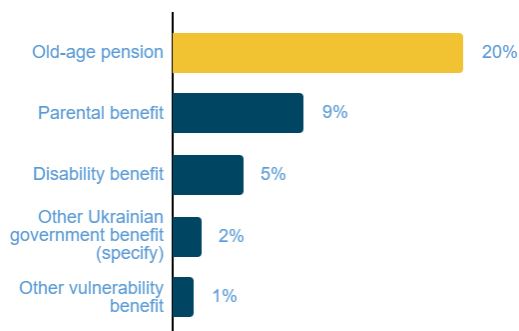
When asked about access to financial services, 85% of the respondents mentioned having access to financial services, while 14% reported no access to such services. Another 1% did not know or preferred not to answer (See Graph 41).

Graph 41 - % of HHs that have bank accounts in their current country (N=1,222)



benefits received. Equally important in this context is that one household can receive more than one form of benefit from the Ukrainian government.

Graph 43 - % of households still covered by the social protection systems from the Ukrainian government (N=1,222)



Related to the occupation of the NEET (No Education, Employment or Training) category, the analysis of young adults' occupation (16 to 24 years old) indicates that 41% are enrolled in educational institutions, 11% follow professional training, and 12% are unemployed/ looking for a job. Another 8% are engaged in household activities and 3% live with a long-term illness or disability. An important share of 24% are currently not enrolled in any form of education, employment, or training. Most of the NEET population is aged between 18 and 22 years old, with 4% being 18 years old, 4% being 20 years old, and another 4% having the age of 22 years old.

Table 1 - Young adults not enrolled in Education, Employment or Training - NEET (N=275)

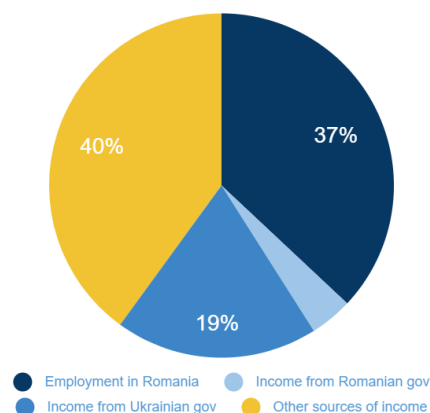
Which of the following best describes what (this person) is mainly doing at present?	16	17	18	19	20	21	22	23	24	Total
Studying	13,82%	14,18%	4,36%	3,64%	4,36%	0,36%	0,36%	0,00%	0,00%	41,09%
Professional training	1,09%	1,09%	2,55%	1,45%	0,73%	1,09%	1,09%	1,09%	0,73%	10,91%
NEET	0,00%	2,91%	3,64%	3,27%	4,00%	1,82%	3,64%	3,27%	1,09%	23,64%
Unemployed/jobseeker	0,36%	1,09%	2,18%	1,82%	0,36%	2,18%	0,36%	2,55%	1,09%	12,00%
Engaged in household or family responsibilities including taking care of children and elderly	0,36%	0,00%	0,73%	1,45%	0,00%	1,82%	1,09%	2,18%	0,73%	8,36%
With a long-term illness, injury, or disability	0,00%	0,00%	0,36%	0,36%	1,09%	0,36%	0,73%	0,36%	0,00%	3,27%
Other: specify	0,00%	0,36%	0,00%	0,00%	0,00%	0,00%	0,36%	0,00%	0,00%	0,73%
Total	15,64%	19,64%	13,82%	12,00%	10,55%	7,64%	7,64%	9,45%	3,64%	100,00%

Economic capacity

To measure economic capacity, a set of indicators is usually recommended, such as the percentage of households that self-report positive or negative changes in their income and the reasons why households register these changes in their income. As explained previously, due to the sensitivity of these questions, few respondents preferred to offer information on these aspects. Therefore, the indicators could not be computed due to the limited data.

Moreover, because income is a sensitive topic, for various reasons such as precarity or certain prejudices, less than half of the respondents answered to the question related to the sources of income within a household (Graph 44).

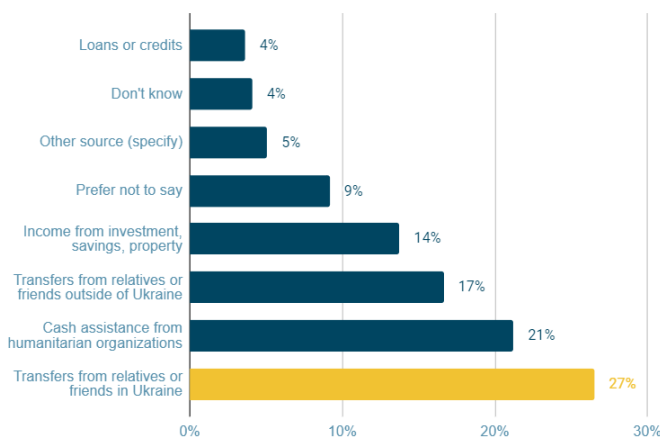
Graph 44 - % of household's income for the last 30 days, by source of income (N=1,043)



Therefore, Graph 44 shows the main types and sources of income per household and their coverage, indicating that 37% of the households have as their main source of income their employment relationships from Romania, 19% of the reported income comes from the Ukrainian government in the form of financial support (pensions and other forms of social benefits), and 4% comes from the Romanian government. 40% of the reported income comes from other sources. It is important to mention that one household reported benefits from one or more sources of financial support, while other households did not report receiving any form of social support at all.

According to the data, most types of income that cover the daily expenses come from other sources of income (40%), detailed in Graph 45. The main sources of income are investments, savings and properties (27%), followed by loans (21%).

Graph 45 - % of households that declare having other sources of income (N=415)

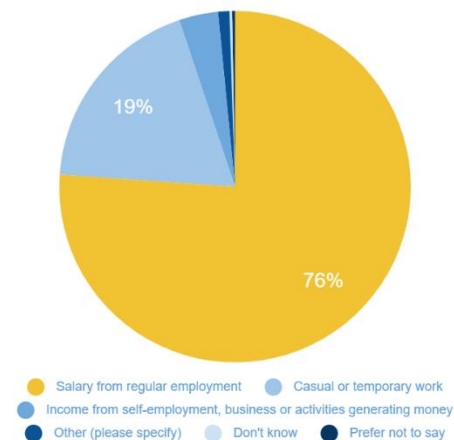


The second main source of income comes from employment in Romania, as shown in Graph 46, where most respondents (76%) receive income from regular employment, followed by 19% who receive income from casual or temporary work conducted in the host country.

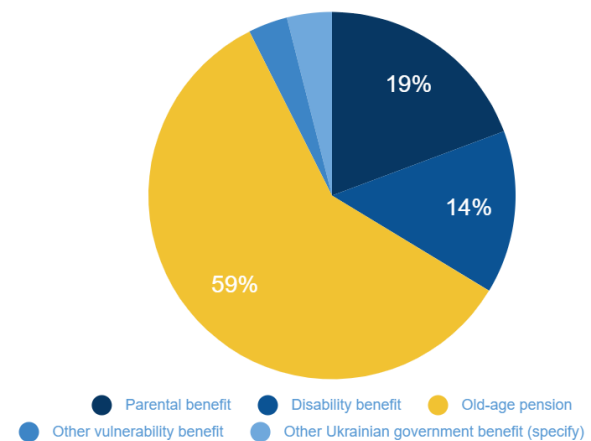
The third main source of income comes from the Ukrainian Government, as displayed in Graph 47, the highest share of income coming from old-age pension (59%), followed by parental benefits (19%). There is also another form of income that is not detailed, which is provided by the Romanian government, covering 4% of the total forms of

income received. It is important to mention that one household can have more than one source of income.

Graph 46 - % of households that declare obtaining their income from employment in Romania (N=389)



Graph 47 - % of households that declare obtaining their income from the Ukrainian government (N=202)



Vulnerability Indexes

Another important component in understanding the socio-economic challenges of the Ukrainian refugees living in Romania, is to look at a specific set of composite indicators that assess various forms of vulnerabilities.

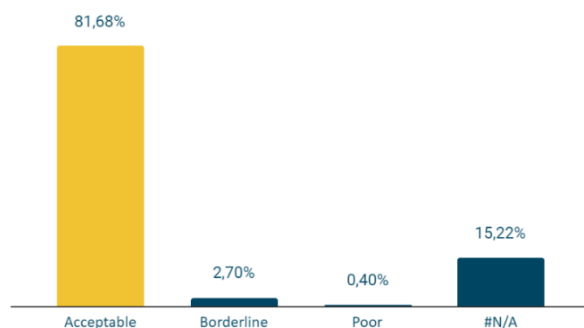
One of the indicators is the Food Consumption Score (FCS), which is the most used food security indicator in humanitarian response. Being a composite indicator, it is computed based on a set of questions that assess the households' dietary diversity, food frequency, and relative nutritional importance of different food groups. The FCS is calculated by inspecting how often households consume

food items from the different food groups during a 7-day reference period.

The FCS is used to classify households into three food consumption groups: (1) Poor; (2) Borderline; (3) Acceptable.

For the 2023 data, the values for the Food Consumption Score indicate that almost 82% of the Ukrainian households, as per the sample, fall into the acceptable category, meaning they have access to good and nutritious food in a constant manner (see graph 48). Important to mention here is the fact that these questions related to the availability of the food items and the frequency and quality of meals are very sensitive; hence a considerable share of households (15.2%) did not respond to this battery of questions.

Graph 48 - % HHs by Food Consumption Score (FCS) group

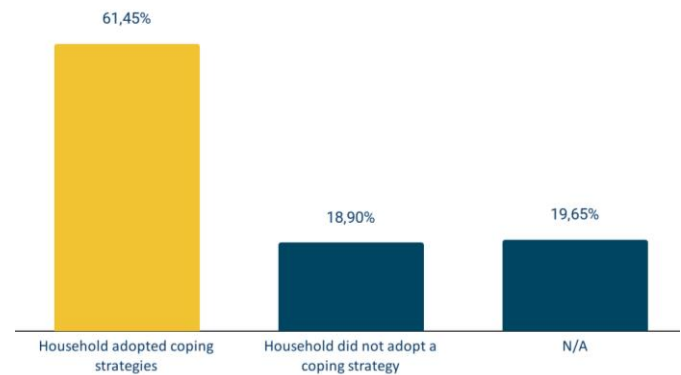


The Coping Strategy Index is another indicator that evaluates if and how households are affected by food insecurity. Being a complex indicator, it is based on a set of five coping strategies that are asked in a survey. The questions ask the households how many days in the last week they applied a food-related coping strategy like “restricting consumption by adults so that children eat”. For computing the indicator, the frequency of each strategy (i.e., the number of days the strategy was applied) is multiplied by standard weights (based on the well-established perceived severity of each behaviour). The higher the CSI score, the more likely it is that the household is affected by food insecurity.

For 2023, 61.45% of the Ukrainian refugee households, as per the sample, adopted various coping strategies as a means to adapt to various form of food insecurities they had to deal with (see graph 49). However, not all coping strategies had the same intensity or severity (“rely on less preferred or less expensive foods” is less extreme than “reducing the number of meals eaten in a day”). Equally

important, around 1 in 5 households did not have to adopt a coping strategy and another 20% of the households did not want to respond to this battery of questions.

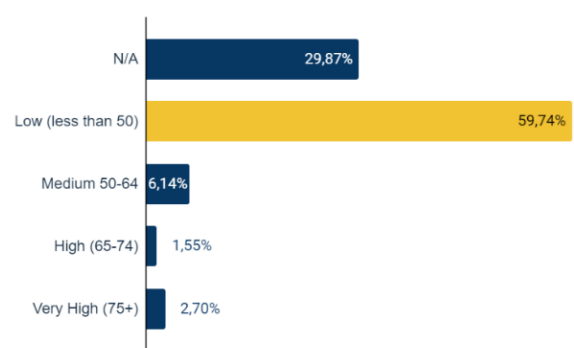
Graph 49 - Reduced Coping Strategies Index (RCSI)



The Food Expenditure Share (FES) indicator measures the economic vulnerability of a household and is based on consumption variables. The higher the share of households’ consumption expenditures on food - out of the total consumption expenditure - the more vulnerable the households are to food insecurity. By the end of the computation process, the total food expenditures are divided into the total expenditures within that household and the result is afterwards grouped into four large categories: 75+: very high (very vulnerable to food insecurity); 65–75: high; 50–65: medium; <50: low;

For 2023, 60% of the households fall into the low category, meaning that food expenditures represent less than 50% of the total expenditures within a household (see Graph 50). However, data should be treated cautiously, as almost 30% of the respondents did not answer these questions.

Graph 50 - Food Insecurity Experience Scale (FIES)



The Livelihood Coping Strategies – Essential Needs (LCS-EN) is an indicator used to understand the medium- and

longer-term coping capacity of households and their ability to overcome challenges to meet their essential needs in the future. The indicator is derived from a series of questions regarding the households' experiences with livelihood stress and asset depletion to cope with food shortages.

To calculate the LCS-EN indicator, the coping questions are grouped in 3 large categories: stress strategies (4 questions)²¹, crisis strategies (4 questions)²² and emergency strategies (3 questions)²³ that represent a ranking of the severity of actions a household needs to take in order to adapt to the new living contexts. The 2023 data, as per the sample, indicates that 8.7% of households adopted emergency strategies, 35.2% had to rely on crisis-coping measures, and 39.95% relied on stress-coping behaviours. Only 16% of the households did not have to adopt any coping strategies.

Graph 51 - Livelihood Coping Strategy Index - LCS



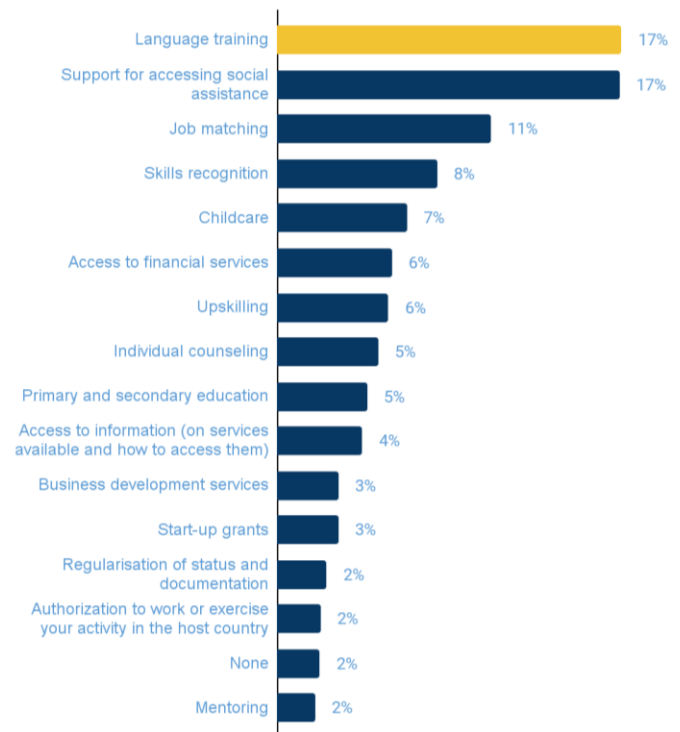
All in all, these composite indicators offer a better insight into the extreme measures a household needs to take for covering the basic needs. Also, they can be used as a good discussion for more personalized and tailored solutions to the basic needs within a household.

Socio-Economic inclusion

Aside from the actual level of socio-economic inclusion calculated by considering the income of the household, preserving the income to a level that allows a proper socio-economic dynamic is an important goal (See Graph 52). Thus, when assessing the perceived needs of the household for better social and economic inclusion for the next six months, the most stringent needs deal with

language training (17% of the responses), followed by the need of support for getting access to social assistance (17% of the responses). The rest of the needs are related to the facilitation of entering the job market, with 11% of the responses indicating the need in job-matching services. Another 8% of the responses indicate the need for skill recognition. Moreover, 7% of the responses address the need for childcare services. Satisfying this need could lead to a decrease in the respondents' activity as carers for infants and an increase in their other employment-related activities. Similarly, 6% of the responses mention the need for upskilling. The need for financial support is another barrier to the socio-economic inclusion of the refugees, mentioned in 6% of the responses. An important mention is that the question design allowed multiple choice answers, hence the higher number of responses than respondents.

Graph 52 - Needs for a better socio-economic inclusion in the next 6 months (N=3,487)



²¹ Example of question that falls under the stress category: *did your household spend savings due to a lack of resources to cover basic needs (such as food, shelter, health, education, etc.)?*

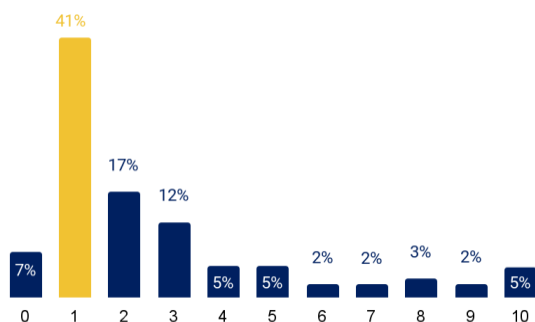
²² Example of question that falls under the crisis category: *did your household sell productive assets or means of transport (sewing*

machine, bicycle, car, etc.) due to a lack of resources to cover basic needs (such as food, shelter, health, education, etc.)?

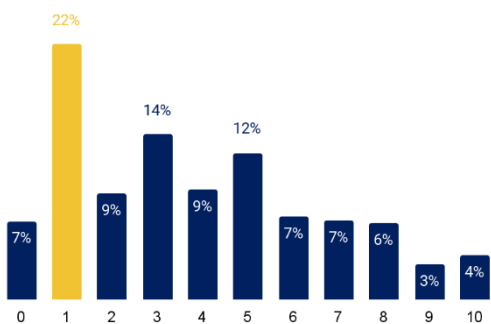
²³ Example of question that falls under the emergency category: *did your household use degrading sources of income, illegal work, or high-risk jobs due to a lack of resources to cover basic needs (such as food, shelter, health, education, etc.)?*

The knowledge of the local language and that of a common language, in this case, English, represents a good opportunity for easier social inclusion. The below graphs show the perceived level of confidence in spoken Romanian (Graph 53) and English (Graph 54). The level of confidence in the two spoken languages was measured by self-assessment on a scale from 0 to 10, where 0 means no confidence at all and 10 means very confident. Most respondents have a very low level of confidence in their language skills in Romanian (41%) and English (22%). Even when the level of confidence in spoken English is a bit higher, 39% of the respondents rated their level of spoken English between 5 and 10, and only 19% of the respondents rate their level of Romanian between 5 and 10.

Graph 53 - Level of confidence in spoken Romanian (N=1,222)



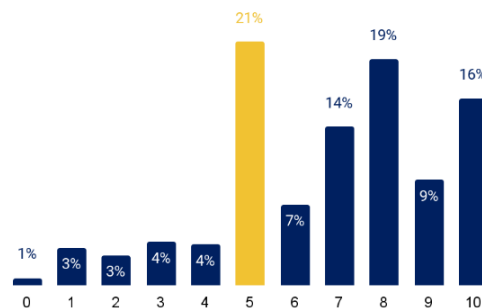
Graph 54 - Level of confidence in spoken English (N=1,222)



Graphs 55 and 56 show the perceived level of positive feelings related to the host country by considering the percentage of household members that feel welcome (Graph 55), as well as the percentage of household members feeling comfortable in the host country (Graph 56). To measure the levels of comfort felt, as well as the level of feeling welcomed, the respondents gave a score on a scale from 0 to 10, where 0 means feeling not

welcome at all or not comfortable at all and 10 means feeling very welcome or very comfortable.

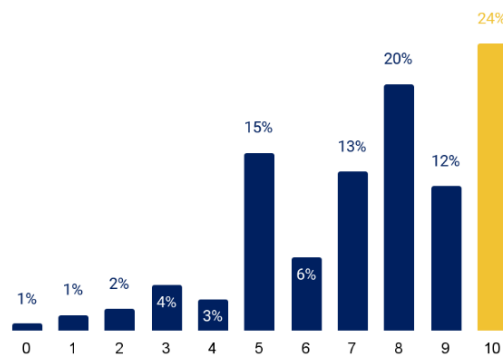
Graph 55 - Feeling welcome in host country (N=1,222)



The data shows mostly positive feelings in both cases, with 44% of the surveyed Ukrainian refugees reporting levels of feeling welcome between 8 and 10, and 42% reporting levels of feeling welcome between 5 and 7.

According to Graph 56, 56% of the respondents report a feeling of comfort between 8 and 10 and another 34% report a level of comfort between 5 and 7.

Graph 56 - Feeling comfortable in host country (N=1,222)

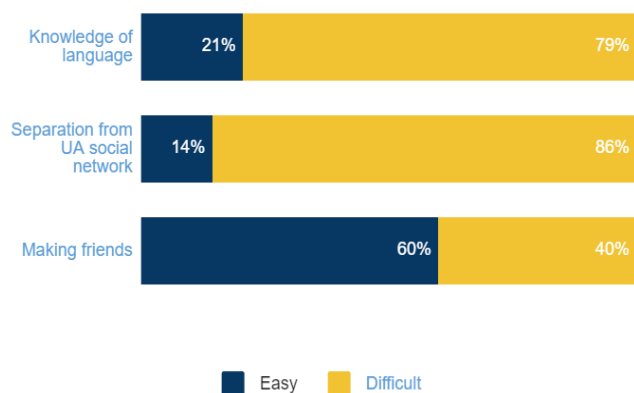


Overall, the positive feelings describe the experience of Ukrainian nationals finding refuge in Romania.

Another way of measuring the rate of socioeconomic inclusion is the perceived propensity to engage in various situations or activities. As shown in the previous data presented, the knowledge of language represents a barrier to the socio-economic inclusion of Ukrainian citizens, 79% reporting it as difficult. Separation from the social network of friends and family in Ukraine also represents a barrier to social inclusion, with 86% of the surveyed households finding it hard to be separated from the social circle from Ukraine.

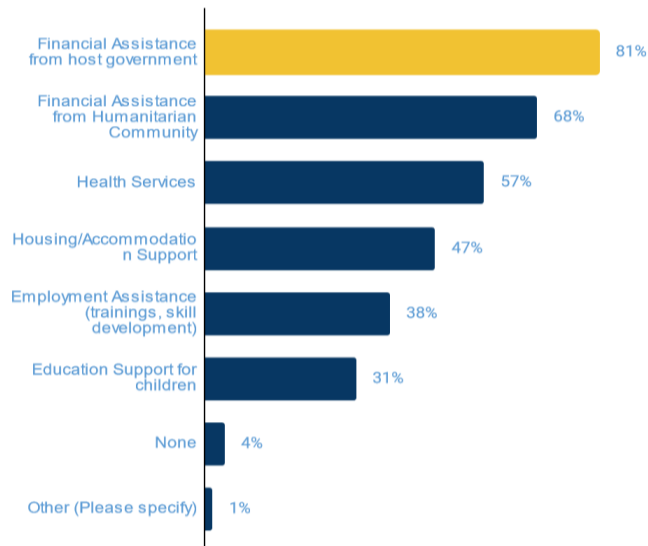
Making friends, which fosters social inclusion, is perceived as being easy by 60% of the surveyed households. This leads to active engagement in cultural, social and leisure activities with locals, fostering social inclusion in the local community (See Graph 57).

Graph 57 - Level of social inclusion



social protection benefits offered by the Romanian government cover only 2% of the cases (See Graph 59).

Graph 58 - Reported needs for the next 6 months (N=1,222)

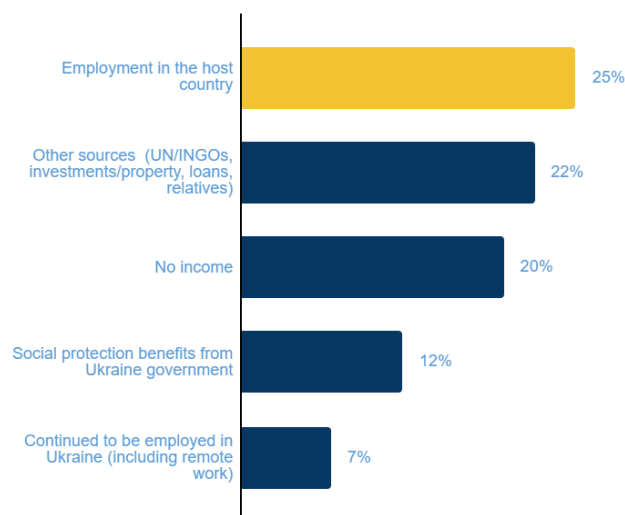


Other analysis

When considering the next six months and assessing their needs, the majority of respondents mentioned financial assistance from the host government (81%), financial assistance from the humanitarian community (68%), and access to health services (57%). An important share of the respondents mentioned needs related to housing / accommodation support (47%) and assistance to get access to the labour market by attending training, and other activities leading to skills development (See Graph 58).

The two main sources of income in the past 30 days prior to the survey, of the households included in the sample, are employment in the host country (25%), and other sources such as NGO support, loans, investments or family support (22%), as per the responses recorded. 20% of responses recorded indicated that some households had no financial income over the last 30 days, while 12% received support from the Ukrainian government. The

Graph 59 - Main sources of income in the past 30 days, MCQ (N=1,465)



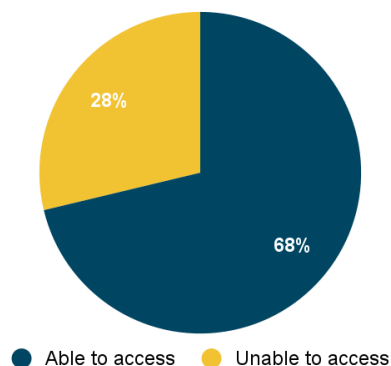
Health

Access

Access to healthcare services represents another cornerstone in the process of inclusion of refugees. As per the sample, 37% of the refugees registered with a Family Doctor (FD) since arriving in Romania. While being registered with a FD is one of the most important steps in accessing medical services offered by the state, an important majority still do not benefit from these services. The reasons behind these numbers are complex. For example, part of the explanation resides in the fact that it is difficult for Ukrainian refugees to find FDs willing to navigate the administrative burden of their registration. In addition, language barriers represent an important obstacle to accessing basic medical services. In Romania, people with temporary protection have access to free essential medical services, including access to a FD, emergency medical procedures or other procedures needed. Still, official registrations are required to access these benefits.

Moreover, within the 30 days preceding the survey, almost one-third of household members (28%) needed to access medical services. Of the refugees who needed to access healthcare services, 28% could not meet their medical needs (see Graph 60).

Graph 60 - % of HHs members who were unable to access healthcare services (N=938)



When asked what the main barriers were in accessing the healthcare services needed, respondents indicated that the lack of knowledge about the healthcare system and the language barriers represented the main obstacles (see Graph 61). Shifting the lenses to women's specific healthcare needs, only 6% of the women (respondents and household members) encountered barriers in accessing sexual and reproductive health services. Due to the high sensitivity nature of the question, there was a small

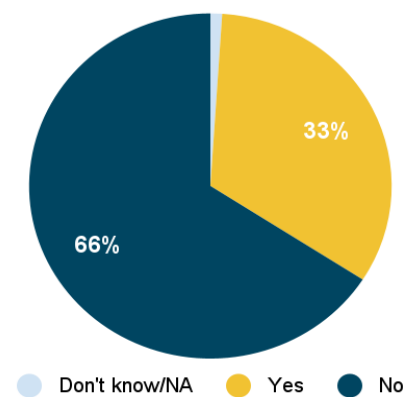
percentage of respondents feeling comfortable to offer information on this topic.

Graph 61 - % of self-reported barriers to accessing health care in the last 30 days - MCQ (N=454)



As per the sample, one third (33%) of the household members have a chronic illness which means a constant need of medical care and support overall. Chronic illnesses represent a form of vulnerability and the refugees that fall under this category need extra care.

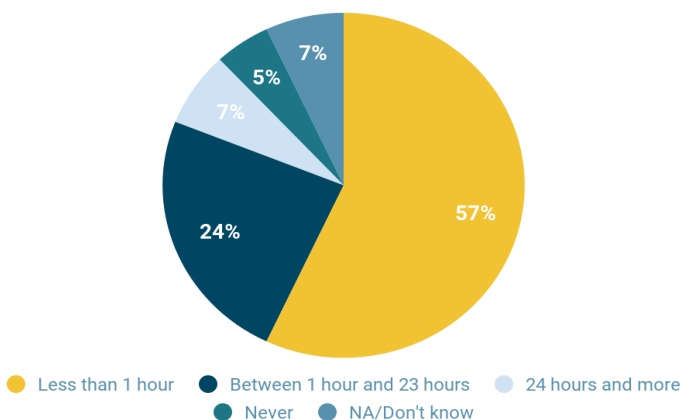
Graph 62 - % of HHs with a chronically ill member (N=3,485)



Child Health and Nutrition

Discussions on children's access to medical services and the protection offered, especially in early childhood, represent topics that need special consideration. Immediately after giving birth, the World Health Organization recommends the initiation of breastfeeding, as this milestone is extremely important for both the baby and the mother. As per the sample, when respondents were asked how soon breastfeeding was initiated, 57% of the respondents declared that in less than an hour after giving birth and for 24%, it was initiated between one hour and 23 hours. For 7% of mothers, breastfeeding was initiated 24 hours after they gave birth (see Graph 63).

Graph 63 - % of Timely initiation of breastfeeding in children aged 0-23 months (N=100)



When respondents were asked if their infants under the age of six months were exclusively breastfed, 50% said yes. However, this information needs to be treated with caution, as there is not enough data collected that could allow a better understanding of this situation²⁴. Moreover, the existing data do not differentiate if the respondents gave birth and started the breastfeeding process in Romania or Ukraine.

Equally important is the discussion on vaccines and how many children have received the recommended shots. As per the sample, 67% of the children aged nine months to 5 years received the measles vaccination and 47% of the children up to 6 years received the polio one. This low percentage of vaccination needs to be interpreted considering some important aspects. Firstly, access to national vaccination programmes is highly dependent to the FD registration. Secondly, the Romanian vaccination schemes are rather different than the Ukrainian ones; without proper explanations, parents do not have the tools to understand and navigate the host country's schemes and health procedures. Language barriers remain an important barrier that influences the vaccination process. While all these considerations are very important and can be used for future policy recommendations, there is not enough data to indicate how many children were vaccinated in Romania and how many in Ukraine.

²⁴ There were only 12 infants under the age of six months.

²⁵ For more details on this programme, please visit the link:

<https://legislatie.just.ro/Public/DetaliiDocument/273596>

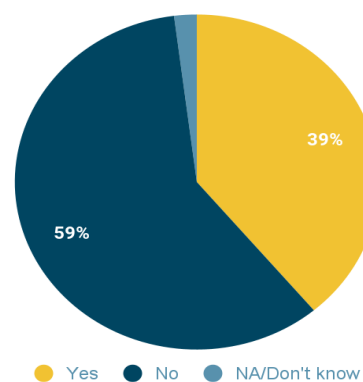
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Access to school meals is also a component related to children's health and nutrition. As it is indicated in the survey, 49.5% of children received one free or fully subsidised school meal per day. The data does not offer any other details regarding the programme through which the children received a meal at school, and it is not clear if the respondents included in their answers the food received through the Romanian national public policy, so-called "Cornul si laptele"²⁵. However, NGOs and experts are constantly recommending to the official authorities to improve the quality of the meals and to adapt them to the children's nutrition needs.

Mental Health and Psychosocial Support (MHPSS)

While mental health and psychosocial-related problems are quite frequent among the displaced people, including here the refugees as well, this topic is also very sensitive and hard to fully grasp. As per the survey, there are 38.8% of households (see Graph 64) who have at least one member who experienced difficult behavioural and emotional experiences (they feel upset, anxious, worried, depressed and these feelings impact their daily activities).

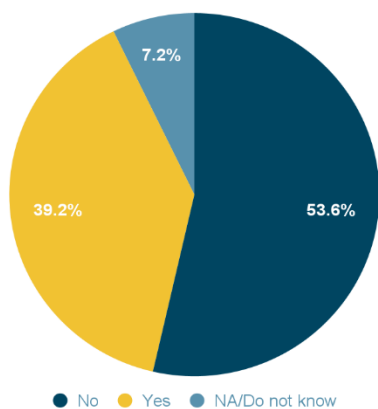
Graph 64 - % of HH with at least one member who experience mental health or psychosocial problems (N=1,222)



Looking at individual level, when respondents were asked if the household members need mental health or psychosocial support, 39% said yes and 54% said no (see Graph 65). In other words, more than one-third of the members that face various mental health-related issues also acknowledge they need professional support. Among

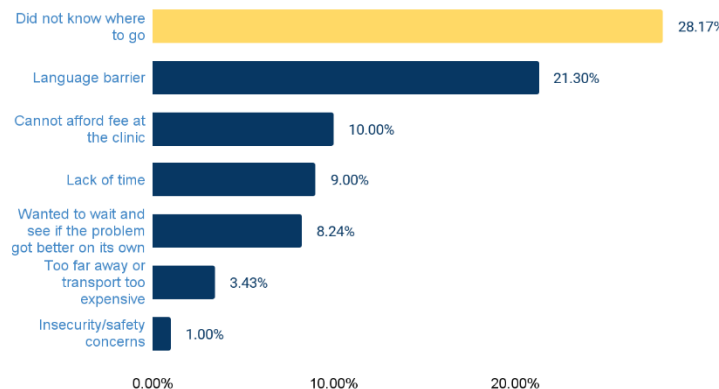
this percentage of people in need, 39% wanted to and received professional help. Moreover, when asked about the type of mental health received, 73% of the responses indicated that psychotherapy offered by a professional either in individual or group-based sessions was the first choice, followed by group or individual support (8.4% of the responses) and alternative means (creative and recreational arts – 8.4% of the responses). Psychiatric support and medication were mentioned in 7.7% of the responses. Alongside the MHPSS received, the location is equally important and offers details about the services designed for refugees. 57% of the refugees received MHPSS in community centres or other community settings and only 9% in health care settings. For almost 20% of the refugees in need of MHPSS, the support was provided remotely, through phone or online.

Graph 65 – % of HH members who need mental health or psychosocial support (N=812)



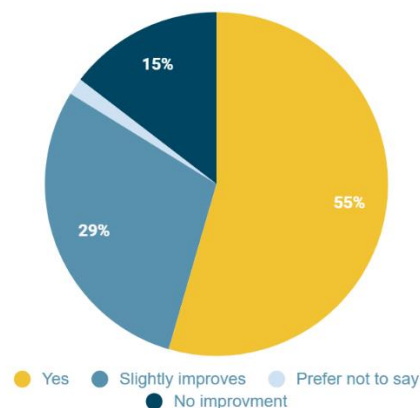
For the ones that did not access mental health and psychosocial support services, when asked about the reasons, most of the respondents did not know where to go, and language barriers still represent an issue that deters people from accessing the services they need. Relevant to the discussion, while not the most frequent reason invoked, the high cost of the fees/services still represents a challenge for an important percentage of the refugees (see Graph 66).

Graph 66 – % of reported barriers to accessing mental health and psychosocial support services – MCQ (N=291)



Among the refugees who benefited from mental health and psychosocial services, 55% indicated an improvement in their well-being, while for 29%, there was just a slight improvement. For 15% of the respondents there was no improvement (see Graph 67). While these data offer a glimpse into a very sensitive topic, more data and answers are needed to generate assumptions and conclusions on this topic. What is safe to say is that, speaking about refugees, mental health and psychosocial support services should be accessible, covering all layers of interventions, advertised on various channels of communication (including Telegram) and offered in Ukrainian.

Graph 67 – % of HH members who received mental health and psychosocial support services and report improvement in well-being (N=123)



Expenditure and Awareness

As per the sample, 79% of the households declare they are aware of the available health care related support, even though there is a rather reduced percentage of refugees

that registered to a General Practitioner. Within the last 30 days preceding the survey, the average healthcare expenditure by households was 353.9 RON, with a minimum of 0 and a maximum of 28,000 RON.

Shelter/ Accommodation

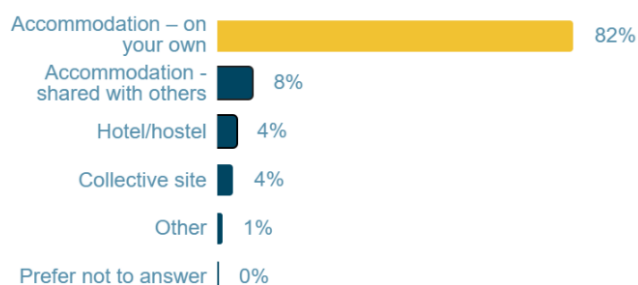
The prevailing accommodation choice among respondents is rented housing, constituting 82% of the total respondents. Approximately 8% of respondents share housing with others, while around 4% live in hotels and hostels, and another 4% reside in collective sites. Notably, in comparison to the 2022 data, 17% of respondents previously lived in collective sites, a change that could also be linked to adjustments in the government support program (See Graph 68), which led to the closure of most collective accommodation sites for refugees from Ukraine in Romania.

Most respondents residing in rented housing are financing their accommodation expenses from their personal budgets. In contrast to the previous year, where 67%²⁶ of refugees residing in the homes of private hosts were exempt from paying rent or utilities due to the coverage provided by the 50/20 program, this year reflects a notable shift, with 78% of respondents independently shouldering their living costs (see Graph 69).

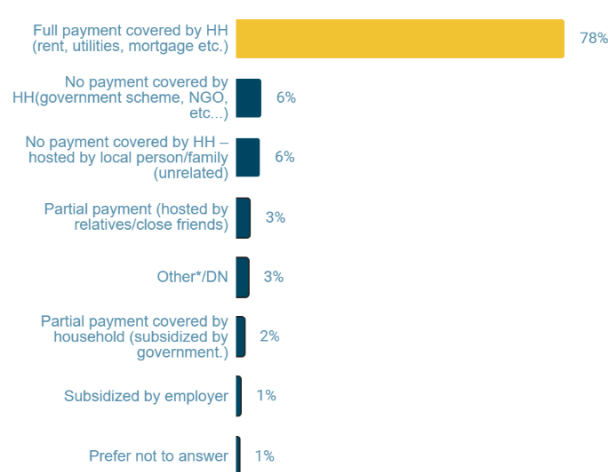
percentage, only 6%, rely only on assistance from the government, non-governmental organizations, or other sources regarding housing costs. Another 6% of respondents do not incur any costs, because they live with friends or acquaintances who do not charge them for accommodation. 3% of respondents share costs with other tenants, typically close friends, or family members. Additionally, 3% of respondents have specific arrangements to cover living expenses, such as receiving help with household chores, paying only for utilities, or working overtime (especially in cases where housing is provided by the employer).

It is noteworthy that some individuals emphasized that they are presently living on credit, having an agreement with the property owner to cover the full cost of living after the government transfers the debt under the new financial support program for Ukrainians.

Graph 68 - % of HHs by type accommodation arrangement (N=1,222)



Graph 69 - % of HHs by payment arrangement (N=1,222)



While the majority of respondents independently cover the expenses for rent and utilities (78%), a much smaller

As the availability of subsidized housing decreases and significant delays occur in payments under the new governmental program, there is a growing concern about

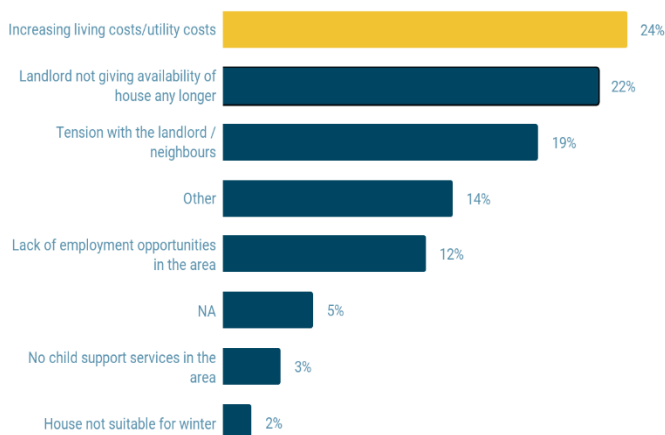
²⁶ Romania Multi-sector Needs Assessment (December 2022) Available at: <https://reliefweb.int/report/romania/romania-multi-sector-needs-assessment-december-2022>, p.44

the potential for further financial hardship among those who are currently unable to meet their rental costs.

The average monthly rent expenditure for households renting accommodation in the last 30 days is around 2,015 RON, varying from a minimum of 0 to a maximum of 9,000 RON. About 53% of households can manage rent payments without facing financial distress. This suggests that approximately every second household encounters some challenges when it comes to renting.

While only 3.5% of households are experiencing pressure to leave their accommodation, the most common reasons for this include increasing living costs and utility costs (24%), followed by the landlord's decision to stop making the house available (22%), and tensions with the landlord or neighbours (19%). Less frequently mentioned reasons include a lack of employment opportunities in the area (12%), absence of child support services in the area (3%), and housing being unsuitable for living in winter (2%) (see Graph 70).

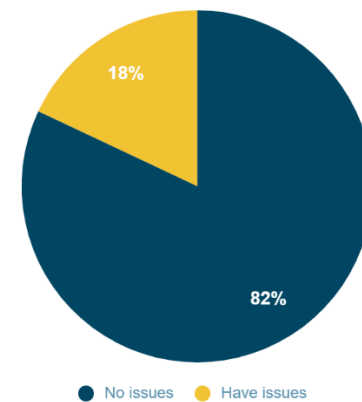
Graph 70 - Reasons for HHs under pressure to leave current accommodation MCQ (N=59)



Merely 31% of households expressed their readiness to remain in their current accommodations for more than six months. This leaves a substantial 69% uncertain regarding their future, particularly in terms of staying in their present locations.

Around one in five households reported encountering issues with living conditions in their accommodation facility. This signifies a noteworthy improvement in living conditions compared to 2022, where approximately one in two households reported facing some kind of issue with their living conditions²⁷.

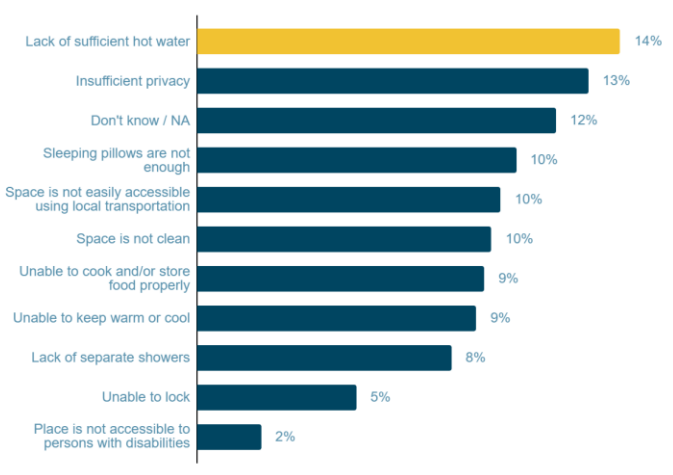
Graph 71 - % of HHs reporting issues with accommodation (N=1,222)



Prevalent issues among respondents include a shortage of adequate hot water (14%) and insufficient privacy (13%). Additionally, concerns about the lack of adequate sleeping materials and limited access to living spaces via local transportation were reported by 10% of households, as depicted in Graph 72. Another 10% highlighted challenges related to cleaning, while an equal percentage expressed difficulties in cooking and/or properly storing food. Nine percent of households reported problems maintaining a constant temperature. Issues such as the absence of separate showers were noted by 8% of respondents. Furthermore, 5% expressed concerns about not being able to lock their accommodation properly. Lastly, 2% highlighted problems related to accessibility for individuals with disabilities.

²⁷ Romania Multi-sector Needs Assessment (December 2022) Available at: <https://reliefweb.int/report/romania/romania-multi-sector-needs-assessment-december-2022>, p.45

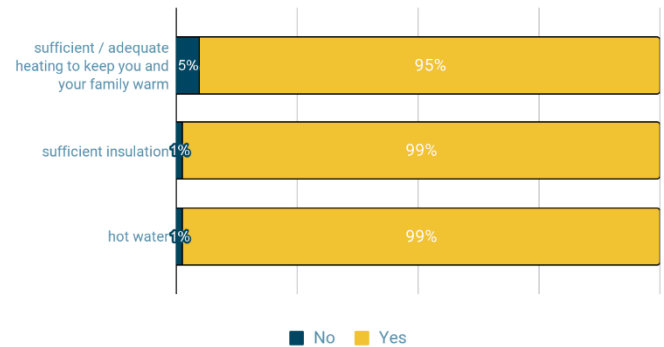
Graph 72 – HHs most reported issues with accommodation – MCQ (N= 384)



Equally important, when asked about winter preparedness, an overwhelming majority (99%) of respondents reported no issues with heat insulation or hot water supply. Only a

modest 5% of households expressed concerns regarding the assurance of adequate and appropriate heating for the well-being of themselves and their families. It's essential to note that since data were collected during the summer months, these concerns might intensify with the onset of the cold season (See Graph 73).

Graph 73 – % of HHs reported being adequately prepared for the upcoming winter period – (N=1,222)



Conclusions

The Multi-Sector Needs Assessment (MSNA) offers critical insights into the situation of Ukrainian refugees residing in Romania and sheds light on various aspects crucial for humanitarian planning and addressing service gaps. Here, we draw conclusions based on the key areas explored in the assessment: demographics, education, protection, socio-economic inclusion and livelihoods, health, and accommodation.

While the MSNA offers valuable insights into the situation of Ukrainian refugees in Romania, certain limitations should be considered when interpreting the findings. These include potential biases in the sampled population, seasonal constraints affecting data collection, high non-response rates to sensitive questions, challenges in data collection in border regions, and underrepresentation of men in the sample. Acknowledging these limitations is essential for ensuring the accurate interpretation and application of the assessment findings in designing effective interventions and support programs for Ukrainian refugees in Romania.

Demographic composition

The demographic composition of Ukrainian refugee households in Romania provides valuable insights into the characteristics and needs of this population. Female-headed households are predominant, comprising 88% of the surveyed households. Women and girls make up 63% of household members. This gender distribution underscores the importance of considering the unique challenges and vulnerabilities faced by women and girls in refugee contexts, including access to healthcare, protection from gender-based violence, and economic empowerment opportunities. The average household size of 2.85 members indicates smaller family units, likely influenced by factors such as separation from extended family members and the challenges of displacement. Most refugee households are concentrated in urban areas, with Bucharest hosting the largest number of households.

Understanding the demographic composition of Ukrainian refugee households in Romania provides a foundation for designing targeted interventions and support programs that address different population groups' specific needs and vulnerabilities. Tailoring humanitarian assistance to

accommodate diverse family structures, gender dynamics, and age-specific vulnerabilities is essential for promoting the well-being and resilience of Ukrainian refugees in their host communities.

Education

The education sector presents both opportunities and challenges for Ukrainian refugee populations in Romania. While efforts to enrol school-aged children in Romanian education have shown improvement, there remain significant hurdles to overcome, particularly regarding language barriers.

The data indicates that a notable percentage of school-aged children were enrolled in official educational tracks in Romania during the 2022/2023 and 2023/2024 school years. However, a considerable portion of children still faces obstacles to enrolment, with language barriers being a primary reason cited for non-enrolment. The fact that 80% of children aged 5-17 are still engaged in Ukrainian distance education highlights the significance of addressing language barriers to ensure a seamless integration into the Romanian education system.

Protection

One significant achievement noted is that 96% of respondents have obtained temporary protection (TP) from the Romanian state. However, despite this high rate of legal recognition, there are still concerns regarding access to proper identification documents, with a small percentage lacking proper documentation. Access to legal status and documentation is crucial for refugees to access support programs and services, emphasizing the importance of addressing any remaining gaps in this area.

Social integration presents another area of concern. 28% of respondents reported tensions in personal communication with Romanian citizens. While these tensions may not necessarily escalate to significant issues, they underscore the importance of promoting mutual understanding and cultural sensitivity within host communities to foster harmonious coexistence. It is crucial to take proactive measures to prevent these tensions from escalating into more severe forms of violence or being exploited in populist discourses.

Furthermore, a notable portion of respondents lacks awareness of available services, highlighting the need for enhanced outreach and communication efforts to ensure

that refugees are informed about the support mechanisms available to them. This is particularly crucial in addressing underreported instances of abuse, especially concerning gender-based violence, where concerns persist despite the majority of refugees feeling safe in Romania.

Socio-economic inclusion and livelihood

Socio-economic inclusion stands as a cornerstone for Ukrainian refugees in Romania, enabling them to integrate into the fabric of the host country's social, cultural, and economic spheres. However, there are many obstacles, particularly in navigating the labour market and accessing essential financial services.

While 60% of the surveyed refugees are inside the labour force, only 33% report being gainfully employed. Language barriers and limited job opportunities hinder employment. Being separated from friends and family in Ukraine is another significant barrier, with 86% of households finding it challenging. Financially, 85% have access to banking services, and the satisfaction in social protection systems is relatively high. Challenges persist for youth (NEET – 24%), requiring language training and job-matching services. Despite language barriers, refugees express feelings of welcome and comfort, indicating progress in social inclusion.

The Vulnerability Scores are another crucial element in comprehending the socioeconomic difficulties faced by Ukrainian refugees. These scores are composite indicators that evaluate food security, household coping strategies, and other survival mechanisms. Depending on the measure, a high share of households had to rely on coping mechanisms or spend an essential share of their budget on food, indicating a dire need for cash assistance services.

Addressing language barriers and improving access to tailored support can enhance socio-economic integration, empowering refugees to contribute meaningfully to their new communities.

Health

Access to healthcare services is critical to meeting the needs of Ukrainian refugees in Romania. Despite this, significant barriers persist, particularly concerning registration with a Family Doctor and access to essential medical care.

While 37% of refugees have managed to register with a Family Doctor since arriving in Romania, a substantial majority still lack access to these services due to various obstacles. Language barriers and difficulties finding family doctors willing to navigate administrative procedures hinder registration efforts, limiting refugees' access to essential healthcare.

A significant portion of household members (33%) have chronic illnesses, indicating a constant need for medical care and support. This fact highlights the importance of providing extra care and support to individuals with ongoing health needs.

Access to national vaccination programs is highly dependent on Family Doctor registration, which may pose a barrier for refugee families. Additionally, differences between Romanian and Ukrainian vaccination schemes, coupled with language barriers, can hinder parents' understanding and navigation of the host country's vaccination procedures. According to the sample, 67% of children aged nine months to 5 years received the measles vaccination, while 47% of children up to 6 years received the polio vaccination. These rates indicate a significant portion of children who have not received the recommended vaccinations.

Mental health and psychosocial support (MHPSS) also emerge as significant concerns, with limited access due to awareness gaps, language barriers, and financial constraints.

While awareness of available healthcare support is increasing among refugee households, addressing barriers to access and enhancing support for mental health and well-being are crucial. Efforts should focus on improving awareness of available services, addressing language barriers, and implementing accessible and culturally sensitive support interventions to ensure that individuals receive the assistance they need to cope with mental health challenges effectively.

Shelter / Accommodation

The housing situation for Ukrainian refugees in Romania reflects a transition towards self-sufficiency, with 78% now independently covering accommodation costs, compared to previous reliance on government support. It is worth noting that a portion of households live on credit, with agreements in place with property owners to cover living costs after the government transfers the debt under the new financial support program. Despite generally

satisfactory living conditions, issues such as a lack of hot water and privacy persist.

Overall, the data underscores the importance of ongoing support and intervention to address housing-related challenges and ensure the well-being and stability of Ukrainian refugees in Romania. This may involve providing timely financial assistance, increasing access to subsidized

housing, addressing barriers to employment, and implementing measures to mitigate tensions with landlords and neighbours. Additionally, efforts should be made to ensure that housing conditions meet basic standards for safety and comfort, especially during the winter months.