



Regional Refugee Response
for the Ukraine Situation

HUNGARY
NOVEMBER 2022

MULTI - SECTORAL NEEDS ASSESSMENT



THE MSNA WAS CONDUCTED IN THE FRAMEWORK OF:



Implemented by:



COVER PHOTOGRAPH:

Refugee children from Ukraine at the UNHCR-funded "Seven Wonders Camp" organized by the Hungarian Red Cross in November 2022.

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List of Acronyms

BNWG	Basic Needs Working Group
CPSWG	Child Protection Sub-Working Group
ESWG	Education Sub-Working Group
GBV	Gender-Based Violence
HUF	Hungarian Forint
IOM	International Organization for Migration
MHPSTF	Mental Health and Psychosocial Support Task Force
MSNA	Multi-Sector Needs Assessment
NFI	Non-Food Items
NGO	Non-Governmental Organization
PSEA	Protection from Sexual Exploitation and Abuse
PSEATF	Protection from Sexual Exploitation and Abuse Task Force
PSS	Psychosocial Support
PWG	Protection Working Group
RCF	Refugee Coordination Forum
RRP	Refugee Response Plan
TCN	Third-Country National
TP	Temporary Protection
UNHCR	United Nations High Commissioner for Refugees

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Executive Summary

In order to inform the planning for the 2023 Refugee Response Plan in Hungary, the Inter-Agency Coordination Team carried out a joint Multi-Sectoral Needs Assessment (MSNA) targeting the population displaced due to the war in Ukraine and currently residing in Hungary. The data was collected in September 2022 through an inter-agency questionnaire, developed within the Refugee Coordination Forum. 512 respondents were interviewed, broken down as follows: 83% Ukrainian refugees, 15% dual citizens (Hungarian-Ukrainian), and 2% third-country nationals (TCN).¹

 **512**
respondents

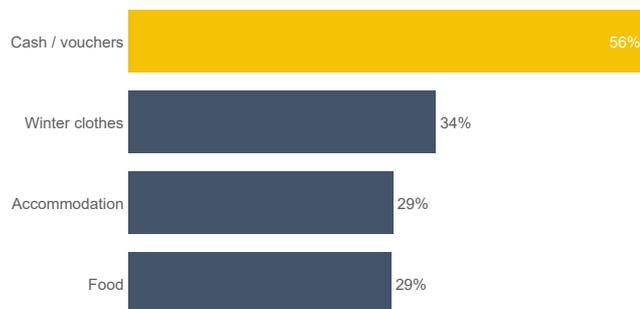
Key Findings

Overall, accommodation, education, employment opportunities, and access to mental health care appeared as the overriding concerns for the population displaced to Hungary from Ukraine. In addition, four out of 10 respondents declared constraints in meeting the basic needs of their household over the past month, while two out of 10 respondents reported current constraints with food for them and their family members.

Priority Needs

The majority of respondents indicated that their priority needs in terms of assistance are financial support in the form of cash/vouchers, in addition to winter clothes and accommodation. When looking at those staying in private accommodation, food is twice as likely to be flagged as one of the most urgent needs, as food is normally provided as part of the accommodation arrangements in collective sites. Similarly, healthcare services are significantly more in demand amongst those staying in private accommodations.

GRAPH 1: TOP 4 PRIORITY NEEDS



* Multiple responses were possible, so percentages can go over 100% when added

¹ The questionnaire covered all categories who had fled Ukraine to be more inclusive and capture the full experience of those with needs due to displacement.

The top four priority needs remain regardless of the main language spoken in the household, place of origin, whether refugees are paying for their current accommodation, household size, or employment status in Hungary. For households with one or more members with disability, the need for medicines raises to fourth place. Access to health care also rises to fourth place for refugees who are not originally from Zakarpatska oblast in Ukraine, and correspondingly are less likely to speak Hungarian.

Language Barriers

Knowledge of the Hungarian language (which is a non-Indo-European language) is an important factor in the inclusion of refugees into the Hungarian social system. Six out of 10 respondents do not speak Hungarian as the main language in the household. One third of those surveyed have not enrolled their children in school – from this third, language barriers were mentioned by 28% as a reason for non-enrollment. It should be noted that it is mandatory in Hungary for children from three to 16 years old to be enrolled in school. 14% of the respondents currently without work in Hungary mentioned language as a challenge in accessing the local labor market making it a contributing factor to high levels of unemployment.

Language barriers were also mentioned among the top three reasons for respondents in need of medical care who were not able to access the needed services. Finally, around half of the respondents reported challenges with access to information, likely because they do not know where to look for information but also because the needed information is only accessible in Hungarian. While respondents reported adequate information related to the access to education of children in Hungary and their health-related rights, they also mentioned the need for more information on integration and access to the labor market.


64 %
do not speak the
Hungarian language


28 %
have not enrolled their
children due to the
language barrier

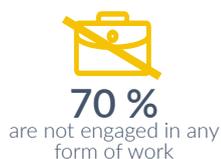
Winter Needs

Winter emerged as a factor exacerbating the current needs of refugees in many sectors, in particular basic needs and accommodation. In fact, the need for winter clothes is consistently recurring within the top three priority needs, in particular for those accommodated in collective sites.

In addition, four out of 10 respondents indicated that insulation and heating were issues in their current accommodation arrangements. Inadequate accommodations for winter and increasing utility costs (including for heating) are a pressure factor to leave their current accommodation for three out of 10 respondents; higher utility costs are particularly affecting respondents in private accommodation. These additional winter-related needs were reflected in the 2022 RRP update in September 2022 ([link](#)).

Employment

Unemployment among refugees is high and is affecting the inclusion and dependency of refugees on aid and external support. Seven out of 10 interviewed refugees are currently not working, with a higher proportion among refugees in collective sites than in private accommodations.² The main recurrent reasons for not working were taking care of children (35%), lack of work available/offered to refugees (25%, with a higher proportion among refugees in collective sites), and language barriers (21%); language is an issue in particular for those outside of collective sites. Most of the refugees currently with a job are reported to be formally employed.



Financial Challenges

Four out of 10 interviewed households reported financial challenges in meeting the basic needs of the household over the past month and this is linked to insufficient financial resources of the household, mainly due to the current situation of unemployment. The incidence of households struggling with basic needs is higher among respondents in collective shelters than in private accommodations. Employed refugees also face challenges, as salary is not enough (26%) or not regularly paid (8%) to cover the needs of one month. This has protection implications, as refugees are mostly spending their current savings, while others prefer to borrow money and/or reduce essential expenditures. 4% are engaging in negative coping mechanisms, such as high-risk informal jobs, begging, and child labor.

² The figures exclude refugees in workers' hostels provided by their employer. Also, the question was asked in relation to the respondent only and does not capture if other members of the household are working.

Two out of 10 interviewed households reported difficulties with access to food in the week before the interview. As a consequence, both in private and collective sites, these same refugees reported to be relying on less preferred and less expensive food options and reducing food portions.

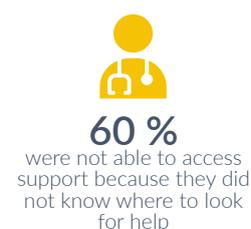


Housing

Accommodation and costs related to housing are of concern for the interviewed population. One in four refugees is covering the cost of their accommodation, either fully paying the rental costs or sharing rental costs with the host community/paying subsidized prices. Refugees currently covering full rental costs are more likely to be located in Budapest, where it seems to be easier for refugees to find employment. One out of 10 respondents declared to feel currently pressured to leave their accommodation, either by the landlord or by rising utility costs. There is a concrete concern that with increased utilities costs and the protracted nature of the displacement, the proportion of refugees requested to pay for housing is likely to increase, significantly impacting already existing challenges in meeting the basic needs of household members.

Mental Health and Psychosocial Support

Important barriers in accessing mental health and psychosocial support have also been identified. 41% of the respondents mentioned that they or members of the households are currently experiencing some form of psychological issues, such as anxiety, stress, difficulties in sleeping, and depression. Of them, 54% think that themselves or members of the household would benefit from psychosocial support but two out of three were unable to access such support, the main reason being because they did not know where to look for help (60%).



» Access the data on [UNHCR's MicroData Library](#)

UNHCR's Microdata Library is a public online library containing anonymous microdata of persons affected by forced displacement collected by UNHCR, its partners and other third parties.

Introduction

A Multi-Sectoral Needs Assessment (MSNA) was conducted in September 2022 across a sample of the population who fled from Ukraine since February 2022 and is currently residing in Hungary, with the goal of capturing the overarching needs of refugees, understanding the level of access to basic services, and understanding service gaps and refugees' priorities for 2023.

Through the findings of the MSNA, the Inter-Agency Coordination Team in Hungary aims to facilitate a common understanding of the evolution of needs and gaps in services of the humanitarian response in Hungary across different sectors for the 2023 Refugee Response Plan (RRP)³, supporting detailed evidence-based humanitarian planning of the different stakeholders. The survey also points to enhancing the capacity of operational partners to meet the strategic aims of the RRP, through the provision of up-to-date, relevant, and comparable information on the multi-sectoral needs of the refugee population targeted by the RRP. At the time of writing, just over 31,000 Ukrainians had applied for Temporary Protection (TP) in Hungary, with border crossings from Ukraine to Hungary of over 1.5 million since the advent of the conflict.

As the first comprehensive assessment conducted in Hungary in the context of the Ukrainian refugee situation, reaching over 500 households in both private and collective shelters⁴, the MSNA builds on a handful of already available smaller-scale surveys and research conducted on refugees from Ukraine in Hungary. By covering multiple sectors of the humanitarian response⁵, the MSNA sought to answer the following research questions:

Demographics	What are the characteristics of refugee households currently residing in Hungary and who is most in need?
Priority needs	What are the needs and service gaps within the refugee community? What are the immediate and structural factors associated with these needs?
Coping and resilience	What behaviours and coping strategies are households undertaking to meet their needs, and what factors influence these behaviours?
Access to information	To which extent do households receive information about their legal status, rights, and obligations in Hungary and services available in Hungary, including protection?
Feedback on received assistance	What are households' perspectives on aid delivery, as well as their preferences and priorities with regard to aid delivery for 2023?

³ The RRP is a regional tool developed to coordinate the response to the Ukraine refugee situation and to capture funding and planning requirements for the response. It has a regional introduction and country-specific chapters. The 2022 RRP is available here: <https://data.unhcr.org/en/documents/details/95965>.

⁴ For the purposes of the analysis, collective sites are defined as larger, pre-existing buildings (dormitories, workers hostels, others), where more than two households of Ukrainian refugees or dual citizens are accommodated for the short, medium or longer-term. Workers' hostels are counted as collective sites, except for questions related to employment (where this exception is noted). Hotels and hostels are, however, categorized separately.

Survey Methodology

The 2022 MSNA was developed and implemented through an inter-agency process, led by the Refugee Coordination Forum (RCF), with the participation of several organizations and agencies who are part of the RCF.

Development of the survey

The survey questions and answers were finalized with RCF partners and Working Group chairs and co-chairs in August 2022.⁶ 30 minutes was established as the average length of the interview required to ensure an acceptable level of data quality and quantity. The survey questions were also translated into Hungarian, Ukrainian and Russian to facilitate the interview process.

Data collection

The roll-out of the survey was implemented by a pool of 17 enumerators, selected from the team of translators and field staff of UNHCR, the UN Refugee Agency, and the International Organization for Migration (IOM) in Hungary. The enumerator teams were composed of 14 female and 3 male enumerators, given the demographics of the refugee households in Hungary as highlighted in UNHCR Protection Profiling and Monitoring undertaken in August 2022. A training for enumerators was organized on 9 September 2022⁷ and the data collection took place from 12 to 25 September 2022. Interviews were conducted in person only with the head of the household or any other adult members consenting to the interview and willing to respond on behalf of the household. The initial target of 500 surveys was surpassed; 512 households were interviewed, out of which 285 were living in collective sites (including worker hostels) and 227 outside of collective sites (for instance with host families, in private rental arrangements or in hotels/hostels).⁸ The sample was purposively selected considering geographical coverage and different accommodation types but is not statistically representative of the whole refugee population. Therefore, results are indicative and reflect the perception and interpretation of the respondents only, at the time of interview. The assessment covered 12 out of 20 counties, selected based on the monitoring of collective sites in Hungary conducted by UNHCR and other organisations prior to the MSNA.⁹ Data was entered by enumerators directly into tablets using KoBo forms, which were submitted and stored on a secure UNHCR server for data protection purposes.

⁵ Basic Needs (including Food Security, Accommodation, Non-Food Items), Protection, including Child Protection, Gender-Based Violence, Accountability to Affected Populations and Communication with Communities, Inclusion, Health and Mental Health/Psychosocial Support, Education.

⁶ Protection WG, Child Protection Sub-WG, Education Sub-WG, Basic Needs WG, Protection from Sexual Exploitation and Abuse Task Force, Mental Health and Psychosocial Support Task Force.

⁷ The training focused on the questionnaire (questions and answers), interview modalities, ethics of interviews, PSEA, and code of conduct. Instructions on how to safely identify and refer protection cases were also provided.

Only adults were targeted for the surveys; 85% of the respondents are women, 15% men. Interviews were conducted with Ukrainian nationals (83%), dual citizens of Hungary and Ukraine (15%) and Third Country Nationals (TCNs) (2% other) who used to reside in Ukraine. TCN nationalities were broken down as: Nigeria (3), Azerbaijan (2), Cameroon (1), Moldova (1). Of them, four were students in Ukraine, one a refugee.¹⁰ Refugees were mainly interviewed in collective sites (60%) or at distribution points (35%). Even though most respondents were interviewed in the same county where they were residing, the place of interview and place of residence might differ. As an important disclaimer, it should be noted that distribution points are mainly located in Budapest, therefore most refugees outside collective sites were reached in Budapest and immediately surrounding counties.



Data cleaning

Data was checked and cleaned by the UNHCR Interagency Information Management team at the end of the survey in line with minimum standards, including outlier checks, analysis of the categorization of “other” responses, the identification and removal or replacement of incomplete, inaccurate or incoherent records, and the re-coding and standardization of entries. All changes to the data were documented in a data cleaning log.

Data analysis

A basic Data Analysis Plan was drafted by UNHCR Hungary and reviewed by UNHCR Regional Bureau for Europe outlining stratifications, additional composite indicators to construct and the basic descriptive statistics to calculate for each indicator. Only data from respondents who provided informed consent were collected and used for the purpose of the survey.

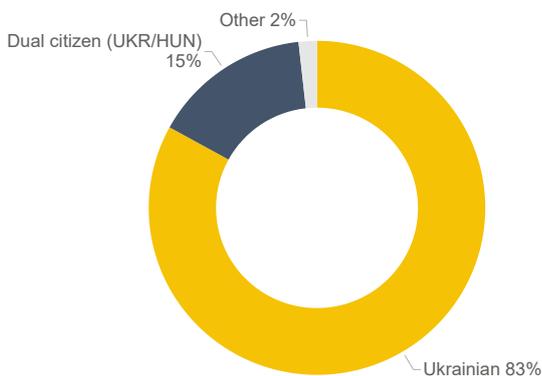
MAP 1: NUMBER OF INTERVIEWS CONDUCTED BY COUNTY



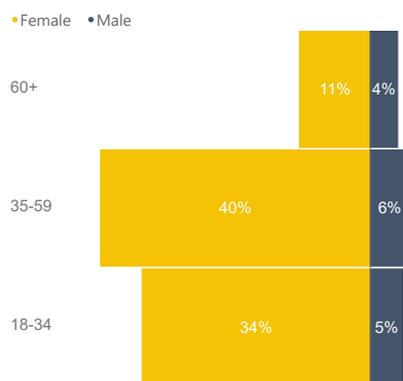
⁸ The measurement unit for the assessment was the household, defined as a group of people living together in a specific location in Hungary.
⁹ The primary source of population data was a list of collective sites surveyed by UNHCR to confirm the presence of refugees from Ukraine across different counties in Hungary, based on the list of collective sites hosting refugees provided by Hungarian authorities in June 2022. The remaining share of the sample was contacted at distribution points, mainly in Budapest, or was drawn from NGOs, charities, and databases of faith-based and refugee-led organizations.
¹⁰ The remaining fell in the category of other, including an individual without status in Ukraine.

Results were not weighted during the analysis, because they did not cover every county and data on the distribution of refugees overall by accommodation type in Hungary was also not available. Based on sector characterizations of vulnerable households, a range of indicators was identified for which the existence of statistically significant differences in outcomes between households of different socioeconomic characteristics could be noted. For instance, households living in Budapest vs. those in rural areas, or those in private accommodation vs collective sites. Filtering by location of interview, type of accommodation, how accommodation is paid for was used to determine whether or not there was an association between these household characteristics and indicator outcomes. Data was further analyzed by criteria such as respondent age, education level, area of origin, language spoken and presence of persons with a disability in the household for selected indicators where differences in the responses were expected (e.g., priority needs, education enrollment, reasons for unemployment). Lastly, in cases in which indicators were comparable, 2022 MSNA results were juxtaposed with results from the Protection Profiling and Monitoring, conducted from June to August 2022.

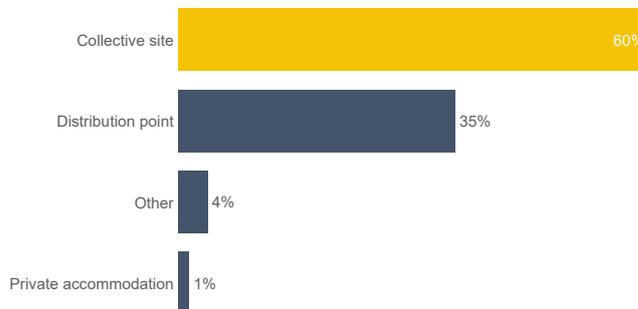
GRAPH 2: RESPONDENT NATIONALITY



GRAPH 3: RESPONDENT AGE GROUP AND GENDER



GRAPH 4: RESPONDENT BY PLACE OF INTERVIEW



Distribution of the findings

The results of the survey were discussed within the RCF, with inputs from UN agencies, civil society organizations, national and international NGOs and refugee-led organizations. The preliminary findings, including basic descriptive statistics, selected significance tests, and MSNA and Profiling comparisons, were shared with the RCF on 7 October 2022 for discussion with partners and Working Groups chairs/co-chairs for validation and additional analyses. Each Working Group and Taskforce was given the opportunity to review their specific report to ensure accuracy and appropriateness before the data were combined and shared in the final report. Where relevant, the reviewed secondary data is integrated and referenced throughout this report.

Privacy and ethical considerations

During the research design, necessary measures were considered to protect the privacy of the respondents. As an opening to the survey, respondents were informed of their right not to participate, not to answer specific questions, or to end the interview when they wished. Informed consent was sought and received at the start of each survey; the enumerator training also included dedicated training sessions on research ethics and code of conduct, including humanitarian and protection principles, Protection from Sexual Exploitation and Abuse (PSEA), and good interviewing practices. Privacy was sought ahead of each interview, whether they took place in collective sites or at distribution points.

Challenges and limitations of the survey

Sampling

As the sampling frame did not cover the entire refugee population in the country, results can only be considered representative of the population included in the sampling frame. There is a lack of comprehensive data and less reach regarding the refugee population outside of collective sites.

Proxy reporting and respondent bias

Data on individuals was collected by proxy from the respondent for the household, not directly from each household member. Results might therefore not accurately reflect lived experiences of individual household members. Certain indicators may be under-reported or over-reported due to the subjectivity and perceptions of respondents.

Relevance of the findings

The humanitarian response to the Ukrainian refugee crisis is a dynamic situation; therefore, the information and insight provided are current at the time when the assessment was completed. Humanitarian interventions, their geographical coverage, the assistance provided might change (either increased or reduced) as does the regime of the Temporary Protection status and the benefits available to the refugee population in Hungary. Hungary as a country is also going through a phase of economic uncertainty, with rising utility costs and double-digit inflation, which can also significantly affect the needs of refugees in Hungary during the upcoming winter season.

Sensitivity around some protection questions (legal status, Gender-Based Violence [GBV], income)

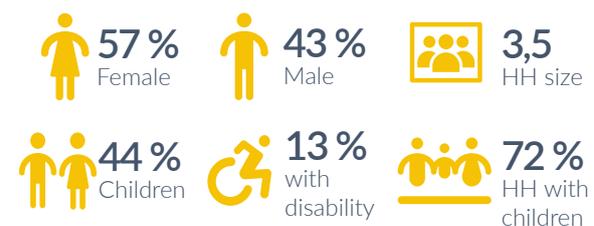
The MSNA is a multisector assessment, Protection is one of the subjects targeted by the survey. It is difficult to get insight into the overall protection situation, safety and security risks in a quantitative survey as for income. Information around protection has been complemented with results of Focus Group Discussions and findings from the monitoring of partners in the field.

Findings

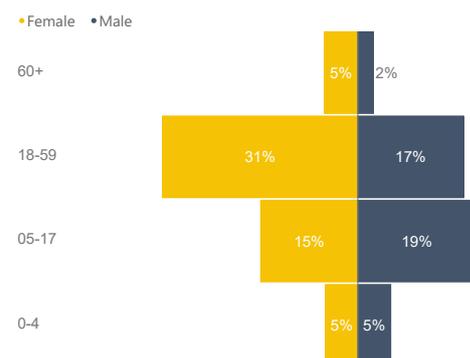
Household Profiles

Women and children represent 80% of all family members, among the refugees who left Ukraine and opted to stay in Hungary from the sampled population. Older persons over 60 years old make up 7% of family members. These results confirm the findings of the UNHCR Protection Profiling and Monitoring undertaken in August 2022 ([link](#)). 89% of refugees sampled have fled Ukraine with a family member (nuclear family: parents and children), 10% with a relative (extended family).¹¹ Three-quarters of refugee households currently live with their children, whom they fled Ukraine with. Half of the respondents reported being separated from nuclear family members, who remained in Ukraine, marking a slight decline from the 77% in the Protection Profiling potentially due to the different sampling and timing of the exercise. 13% of the households interviewed reported persons with physical or mental disabilities in their household living with them in Hungary, a value in line with the global prevalence rate (15% as per WHO data).¹² Four out of 10 refugees are originally from the Zakarpatska oblast, followed by Kharkivska (one out of 10), Donetsk and Dnipropetrovska. These results are also in line with the Protection Profiling results.

Generally, the refugees interviewed have a higher level of education: 25% have a master's degree and 9% a bachelor's degree (see graph in Annex). The level of education of refugees who are currently residing in Budapest who took part in the survey is higher than refugees residing outside of Budapest, with 46% having completed university studies in comparison to 26% of those living outside the capital. In Budapest, 22% have not finalized secondary education, compared to 29% outside the capital.



GRAPH 5: HOUSEHOLD AGE GROUP AND GENDER



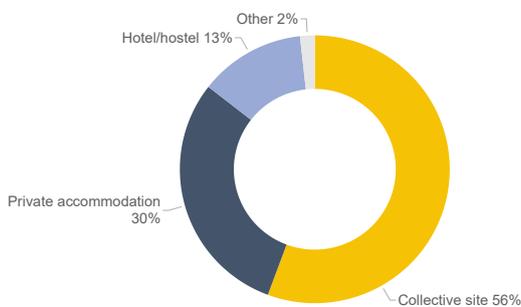
¹¹ For the purpose of the MSNA, the definition of nuclear/extended family have been taken from the Oxford Dictionary; nuclear family: couple and their dependent children, regarded as a basic social unit; and extended family: family which extends beyond the nuclear family to include grandparents and other relatives. The remaining 1% is currently in Hungary with other unrelated person/s.

¹² <https://www.who.int/health-topics/disability>

Accommodation (see Annex for more graphs)

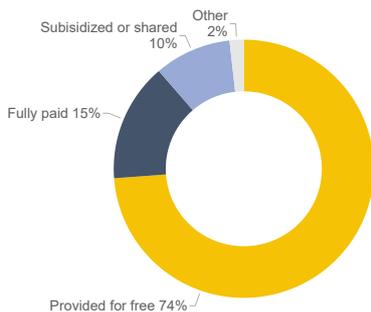
Most of the refugees interviewed are currently hosted in collective sites. One in three interviewees is residing in private accommodation and the percentage differs based on the location of residence; 61% of the refugees surveyed in Budapest are staying in private accommodation (7% in the rest of the country), while 74% of the refugees surveyed outside of Budapest are accommodated in collective sites, followed by hotels/hostels (18%). These results are not considered to be representative of the refugee households in Hungary, since the survey faced challenges in reaching out to refugees in private accommodation, especially outside of Budapest, as mentioned among the limitations of the MSNA.

GRAPH 6: ACCOMMODATION TYPE

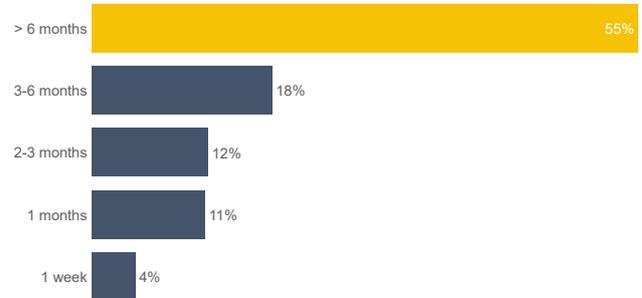


The majority of refugees reported not currently covering the costs for their accommodation, as housing is provided to them for free (either through collective sites or private accommodation). One in four refugees (26%) is paying for accommodation, either fully covering the rental costs (15%) or sharing rental costs with host community/costs are subsidized (10%); refugees currently covering for the full rental costs are mostly located in Budapest (33% in Budapest vs 4% in the rest of the country). If compared with the current employment situation, two-thirds of the respondents who are currently paying for their accommodation are not working, and more than half reported a lack of income to meet their basic needs. As a result, 3 out of 4 households who reported a lack of income had to engage in behaviors such as spending savings, borrowing money, selling assets, or reducing essential expenditures on for instance health and education (this rate was slightly lower - 57% - for those who are being hosted for free).

GRAPH 7: PAYMENT FOR ACCOMMODATION

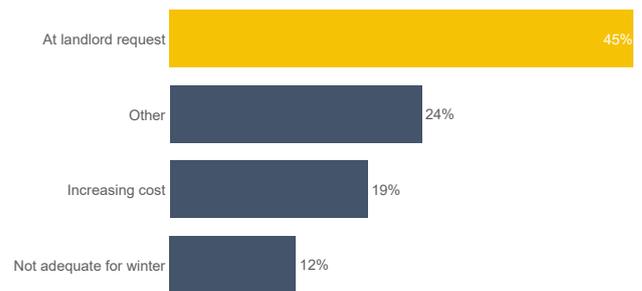


GRAPH 8: DURATION OF STAY



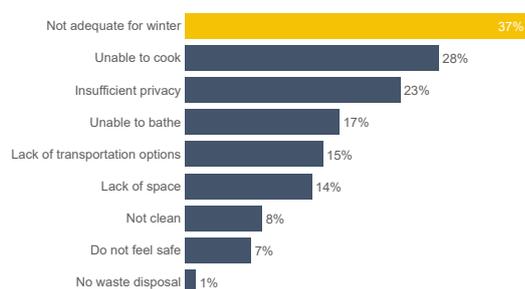
55% of the interviewees have the understanding that their accommodation arrangements are long-term (for 6 months or longer), both in Budapest and in the rest of the country. 30% have medium-term accommodation arrangements (from 2-5 months), while 15% have short-term accommodation (1 month or less). 13% of the respondents are or feel currently pressured to leave their accommodation, with higher rates in Budapest (20%) compared to the rest of the country (8%) and for those who pay for their accommodation (17%). While in most cases the pressure is coming from the landlord, for refugees renting, the pressure to leave comes from the expected increase in utility costs. Housing arrangements not suitable for the winter have also been reported by refugees (12%) as a pressure factor to change accommodation in the near future.

GRAPH 9: REASONS FOR PRESSURE TO LEAVE



One third of refugees report issues with their current living arrangements. It is mainly refugees in collective sites (71%) who reported accommodation concerns; only 18% in private accommodations reported concerns. In collective sites, the most common issues reported are linked to the absence of cooking options, unsuitability for winter, lack of privacy or lack of or inadequate bathing facilities. In private accommodations, most of the problems reported were linked to the place not being adequate for winter, lack of privacy, lack of adequate cooling/heating system or lack of adequate space. 4% in collective sites and 2% in private houses reported not feeling safe in their current neighborhood.

GRAPH 10: ACCOMMODATION ISSUES



* Multiple responses were possible, so percentages can go over 100% when added

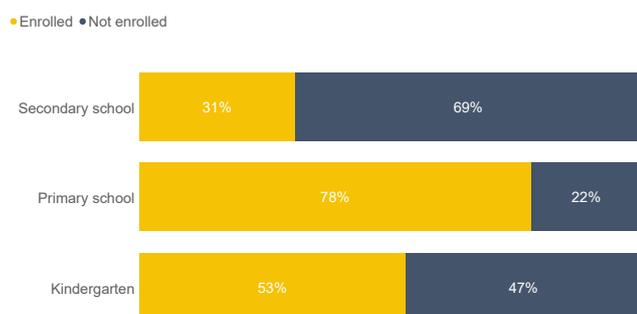
Education

The 2022/23 school year in Hungary started on 1 September 2022. According to Hungarian law, kindergarten and school are mandatory for children between the ages of 3 and 16 years old, which is applicable from the moment of applying for Temporary Protection Status in Hungary.

 **7 out of 10 children are enrolled in Hungarian education**

Seven out of 10 respondents reported that their children are currently enrolled in the mandatory school level; refugee children were mainly enrolled in primary schools (78%), kindergarten (53%) and secondary (31%) The enrollment rate into schools is marginally higher among Hungarian-speaking households (67%) compared to Ukrainian or Russian speakers (57%). As the updated official number of refugee children currently enrolled in Hungarian schools is not available for comparison, the findings on school enrollment of the MSNA should be considered as representative for the statistical sample of the survey, mainly living in collective sites; the actual number of children out of Hungarian education is believed to be higher.

GRAPH 11: ESTIMATED ENROLLMENT RATES BY SCHOOL TYPE

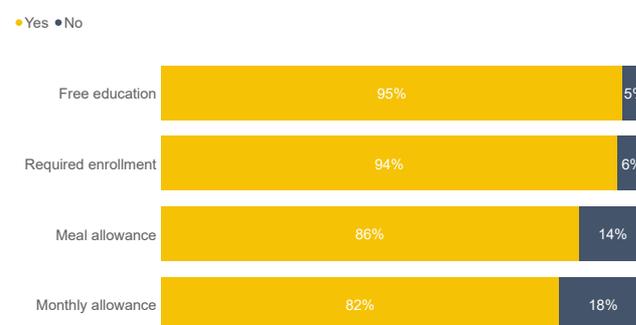


Based on focus group discussions and information shared within the Education Sub-Sector Working Group, refugees from the Roma minority from Zakarpatska face several challenges with school enrollment and attendance; even if most refugee children from a Roma background speak Hungarian as mother tongue, they are in need of catch-up classes, as they may not have systematically attend school back in Ukraine; also, cases of discrimination regarding school enrollment and attendance are reported by participants of the Working Group.

One in three refugee children in the households of the respondents living in Hungary are currently not enrolled in schools, mainly because they are enrolled online in Ukrainian schools or are attending community-run schools in Hungary (58%), language barriers (28%), or lack of places in nearby schools (18%). In order to enhance access to education for children, refugees requested support in terms of laptop/tablets for online learning (57%), school supplies and equipment (49%), and Hungarian language classes (34%).

Refugees are generally aware of responsibilities/entitlements of Temporary Protection holders in terms of free access to education: mandatory enrollment into kindergarten, primary and secondary school in Hungary until the age of 16 (95%), until the age of 16 education is free of charge (95%), meal allowance (86%) and monthly allowance for the children (82%).

GRAPH 12: AWARENESS ABOUT OBLIGATIONS AND ENTITLEMENTS



Health (see Annex for more graphs)

Approximately half of the respondents reported health issues in the past month which required access to health care. Of them 83% were able to access health services in Hungary.

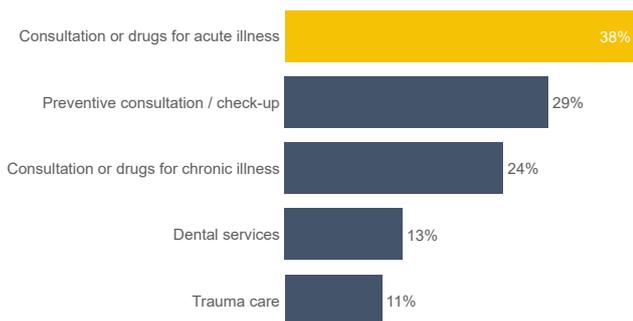
 **43%** had healthcare needs in the last 30 days

 **83%** of them obtained healthcare services

Approximately 28% could not access health care, mainly due to refusal by the service providers (in particular outside of Budapest, probably linked to the lack of awareness about the conditions for free healthcare for refugees), long waiting time and language barriers. Refugees from Ukraine reported being generally aware of the health rights associated to their status, in particular for access to free emergency care (91%), COVID-19 testing and vaccinations (80%), and full health care coverage for those with refugee or TP status.

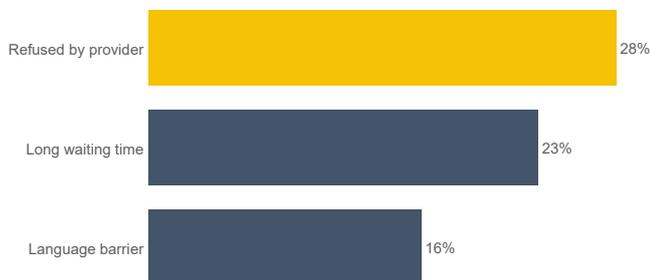
In terms of vaccination, one out of 10 households with children under five declared that their children have not received the measles vaccination. Four out of 10 refugees declared that they themselves and their family members in Hungary received the vaccination against COVID-19 (either in Ukraine or in Hungary, not specified). An additional four out of 10 did not receive any COVID-19 vaccination and approximately two declared that some members have, and others have not.

GRAPH 13: TOP 5 HEALTHCARE SERVICES NEEDED (<30 DAYS)



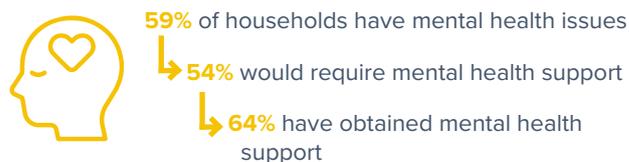
* Multiple responses were possible, so percentages can go over 100% when added

GRAPH 14: TOP 3 REASONS FOR NOT OBTAINING HEALTHCARE



Mental Health and Psychosocial Support

41% % of the respondents mentioned that they or members of their household are currently experiencing some form of psychological issues, such as anxiety, stress, difficulties in sleeping, and depression. Of them, 54% think that they or members of the household would benefit from psychosocial support but two out of three were unable to access such support, the main reason being because they did not know where to look for help (60%, see graph in Annex).



In Hungary, the MHPSS Working Group has conducted some mapping of services available, which will facilitate referrals (and self-referrals) of refugees to service providers. It should also be noted that from anecdotal reports by MHPSS partners, even though the main barrier for MHPSS is lack of information on how to access services, it might occur that, even once the barrier is addressed, there could not be enough services to handle the increase in demand. This is even further complicated by the lack of information regarding the existence and access to government-provided MHPSS services (in particular outside of urban centers). It is recommended that as information sharing on services increases, adequate capacity to provide MHPSS services is also ensured.

Protection (see Annex for more graphs)

96% of the Ukrainian refugee respondents and their family members currently in Hungary have applied (93%) or are planning to apply (3%) for Temporary Protection (TP). This includes households where not all members have yet been granted the status.¹³ Findings might be biased due to the fact that the majority of interviews took place in collective sites (and therefore registered for TP with the authorities given sites provide specific assistance to register) and many refugees, mostly at distribution points, refused the interview.

Out of the TP holders, 69% have received at least once financial assistance from the Government of Hungary (subsistence allowance of 22,800 Hungarian Forints or HUF - equivalent to \$55 - for an adult and 13,700 HUF for children - equivalent to \$30). This does not necessarily imply that they are currently receiving the assistance or that they have received it regularly.



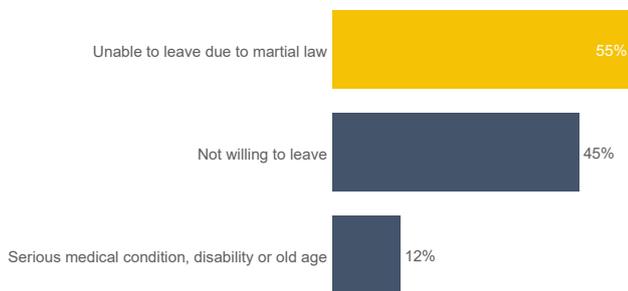
¹³ Note: only Ukrainian nationals are eligible to apply for TP.

Half of the households interviewed are currently separated, in particular from adult men (fathers, husbands, and siblings) who were unable to leave Ukraine due to martial law, forbidding men of the age of conscription to leave the country. Separation has also occurred due to the refusal by family members to leave Ukraine or due to inability to travel.



53% of households reported they have been separated from a family member due to the conflict

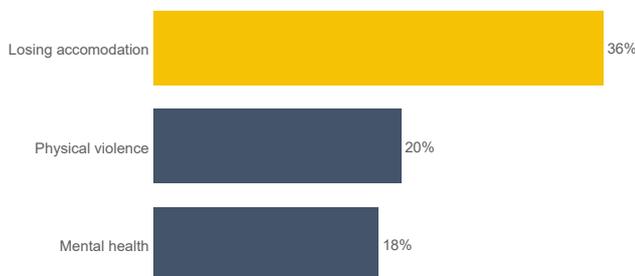
GRAPH 15: TOP 3 REASONS FOR FAMILY SEPARATION



Child Protection and Gender-Based Violence

16% of the respondents reported protection and safety concerns for children in their current area of residence. They mostly indicated an increased risk of losing their accommodation (36%), increased vulnerability to physical violence (20%), worsened psychosocial condition (18%), risk of trafficking, and neglect. Limitation: one-to-one survey and a household approach are not ideal to capture protection findings; furthermore, the survey targeted only adult respondents, so the findings lack a child's perspective.

GRAPH 16: TOP 3 PROTECTION CONCERNS FOR CHILDREN



Interviewees reported concerns for women and girls, in particular concerns for discrimination in the host country, risk of physical and sexual violence and trafficking. It should be noted that 85% of the respondents were women; a caveat being a one-to-one survey and household approach are not ideal to capture protection findings. 12% of the respondents reported unsafe areas for women and girls in their area of residence, both in Budapest and other parts of the country, whether they are staying in collective sites or other types of accommodation. Those who identified unsafe areas for women and girls indicated they mostly feel unsafe outside of their homes and on public transportation. 16% reported women and girls not feeling safe in temporary accommodation and 2% in their current workplace.



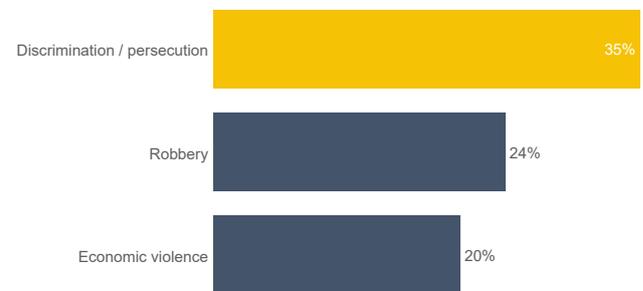
1 out of **10** women have concerns about their safety

The majority of the refugees are aware of the child protection and GBV services available in their areas of residence. Child-friendly spaces (60%), and government-run social services (36%) are among the most present points of assistance. Among less present services, there are reproductive health services, psychosocial support and GBV services. Eight out of 10 respondents declared to know where to refer someone who was sexually assaulted and indicated the police as the first entry point (87%), government social service centers (including the government hotline) (13%), 9% health facilities and 3% legal services.



1 out of **10** women and girls avoid or feel unsafe about places

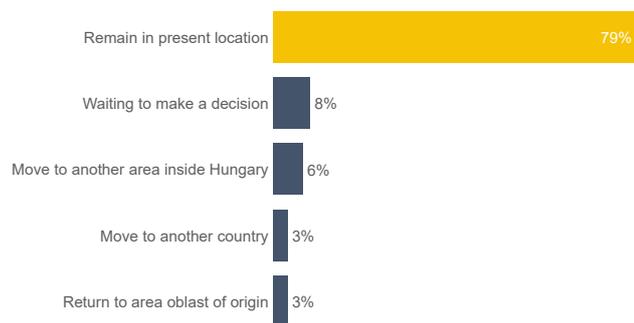
GRAPH 17: TOP 3 PROTECTION CONCERNS FOR WOMEN



Future intentions

The majority (79%) of the respondents who are currently residing in Hungary intend to remain in the country in the near future (in comparison to 50% in the Profiling undertaken in August 2022) and an additional 6% are planning to move within Hungary. A minority (6%) of respondents declared their intention to move from Hungary, either returning back to Ukraine (3%) or moving onwards to a third country (3%). In comparison, the findings of the Profiling found that 23% expressed the intention to return to Ukraine in the near future and 18% to move on to another country.

GRAPH 18: MOVEMENT INTENTIONS FOR THE NEXT 3 MONTHS



Coping Mechanisms and Resilience (see Annex for more graphs)

30% of the respondents are currently working. Refugees accommodated outside of collective sites (without counting collective workers' accommodations) are more likely to be employed. Most of the refugees currently with a job are employed formally, while one in five is working through informal working arrangements.¹⁴ Others are working remotely from Hungary or are engaged freelance (over six out of 10).



30% of the respondents are currently **working** this is **27%** in collective sites (excl. workers' hostels) and **32%** in other locations

It should be noted that to avoid statistical distortions, refugees residing in workers' hostels were not included in the calculation for collective sites, to avoid distortion of the findings. In fact, refugees in workers' hostels are usually employed by their shelter providers.

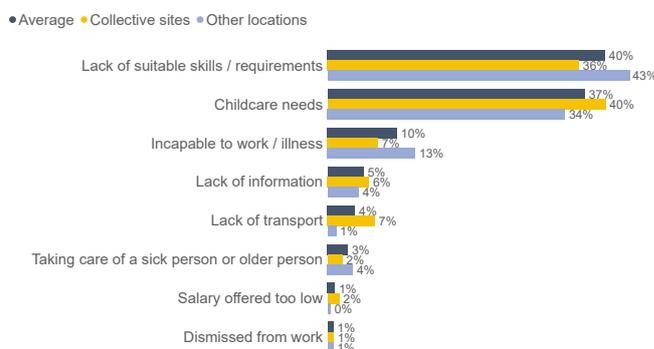
Refugees were previously working in different sectors in Ukraine, in particular financial/insurance and domestic work, followed by education, manufacturing, agriculture, construction, trade, medical services, and administrative support. After displacement, refugees have mostly been engaged in the manufacturing sector, domestic work, and hospitality. Apparently, the displacement out of Ukraine has caused a shift in employment sectors for refugees from skilled to unskilled or low-skilled type of employment. As a result, a significant portion of those currently working are underemployed (perform a job below their skills level). The main reasons for the skill mismatch are language barriers, difficulties in skills recognition, and lack of information about the labor market.

Seven out of 10 respondents are currently not working, with a higher proportion among refugees in collective sites.¹⁵ Some of the most recurrent reasons for unemployment are the inability to find work due to lack of language skills, lack of recognition of skills or lack of education (45%) as well as childcare needs (37%). Language is an issue in particular for those respondents outside of collective sites and is the most common reason for unemployment amongst those with a master's degree.



70% of the respondents are currently **not working**

GRAPH 19: MAIN REASONS FOR UNEMPLOYMENT BY ACCOMMODATION TYPE



For those citing lack of childcare services, only 17% have children up to 2 years old, whom are not yet eligible for kindergarten. The remainder are of kindergarten age (19%), primary school age (31%) and secondary school age (33%), implying that many of them are at home and not attending Hungarian school in person, especially those of secondary school age.

The average net income per person in 2022 in Hungary is 347,200 HUF or \$850 (503,500 HUF or \$1,233 gross). The poverty threshold (last established in 2020 in Hungary) for a four-member household (two adults and two children) is 243,932 HUF or \$597 per month (meaning approximately 60,000 HUF or \$147 per person), and for a one-member household it is 116,158 HUF or \$284 per month. Most refugee households are under or around the income poverty threshold of Hungary, by comparing income and expenditure patterns. 44% of the respondents were willing/able to provide information relating to their current income (225 respondents).¹⁶



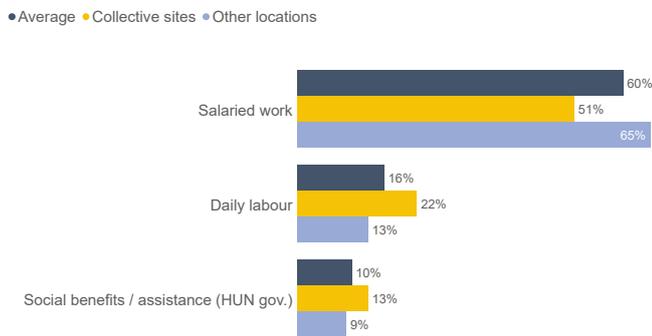
213,634 HUF (\$ 535) is the **average monthly income per HH**
58,599 HUF (\$ 147) is the **average monthly income per individual**

¹⁴ Out of those employed only 64% have social insurance and are formally, legally employed; additional benefits depend on whether they receive minimal wage or higher amount.

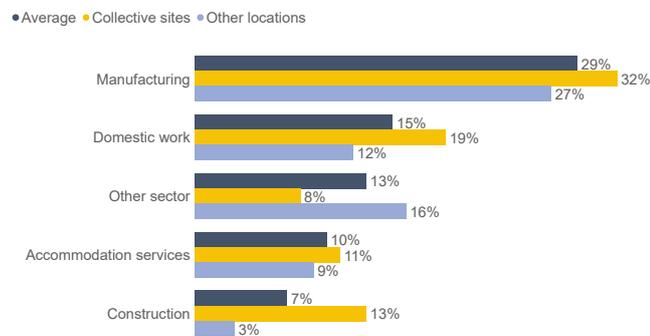
¹⁵ It should be noted: someone in the household might be working, however, the question was asked to the respondent only.

¹⁶ Data collected is an estimation for the previous 30 days or since they arrived in Hungary. It should be noted that refugees are also provided with in-kind humanitarian assistance (accommodation, food, etc.) with the goal of meeting their basic needs and compensating for their low/lack of income.

GRAPH 20: TOP 3 SOURCE OF INCOME BY ACCOMMODATION TYPE

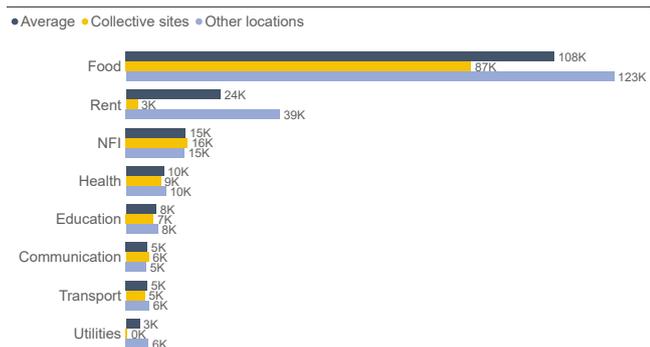


GRAPH 21: TOP 5 CURRENT OCCUPATIONS BY ACCOMMODATION TYPE



The average monthly expenditure per household is 178,614 HUF or \$430, with a higher rate for respondents outside of collective sites (\$511). Most of the expenditure goes to food, with a markedly higher incidence for respondents not hosted in collective sites, where food is part of the services provided. It should be noted that for respondents in collective sites, one of the main issues with their current accommodation arrangements is the lack of accessible kitchens and the possibility for households to cook food for themselves. Rent is, as expected, the second highest expenditure for respondents outside of collective sites.

GRAPH 22: EXPENDITURE CATEGORIES BY ACCOMMODATION TYPE (IN THOUSANDS OF HUF)



Four out of 10 households reported financial challenges in meeting their basic needs over the past month. Unemployment is mentioned by almost three out of four refugees interviewed as reason for not being able to meet the financial needs of the household, because they have children to take care of (35%), and due to language barriers (31%). It should be noted that, based on Focus Group Discussions and monitoring activities of partners, some cases were identified of working parents leaving their small children in accommodations/shelters without appropriate supervision, in absence of sufficient childcare services and difficulties with school enrollment. Reportedly, Hungarians (esp. single-headed families) struggle with childcare as well but they can rely on extended family, friends, older siblings for childcare.



39%
of the households have insufficient money

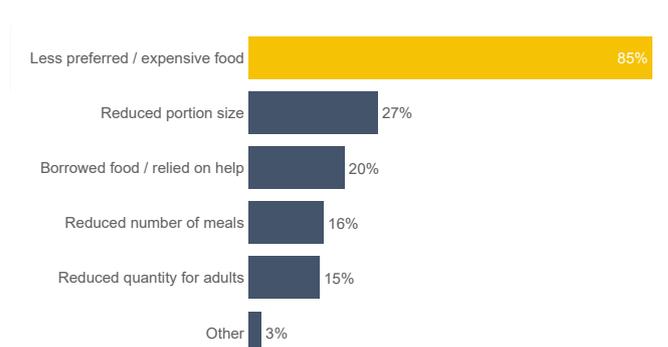
Despite an average income that is higher than the average expenditure, for employed refugees one out of three refugee respondents mentioned that the reason for not being able to cover entirely the basic needs of the household with the current financial resources is that the salary is not enough or not regularly paid. This has protection repercussions, as these households are likely to be more dependent on the current humanitarian assistance provided. In order to meet their basic needs, respondents have highlighted that they are unable to save money, in their current situation of displacement, and/or borrowing money. 4% are engaging in negative coping mechanisms, such as high-risk illegal jobs, begging and child labor.



22%
of the households struggle with access to food

In addition, two out of 10 interviewed households reported difficulties with access to food, in the week before the interview. As a consequence, both in private accommodation and collective sites, refugees reported relying on less preferred and less expensive food options and reducing food portion.

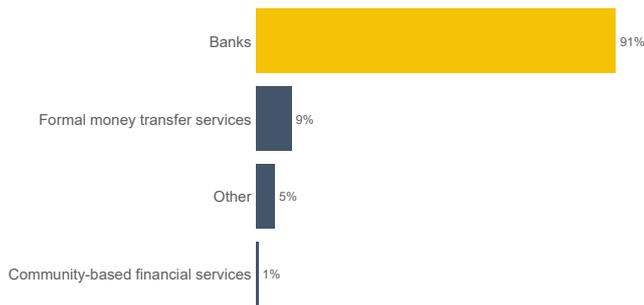
GRAPH 23: USE OF FOOD-BASED COPING MECHANISMS



6 out of 10 refugees are currently not using financial service providers in their current areas of residence. Of those accessing financial services, the vast majority is relying on banks (91%), rather than money transfer services (9%) or other forms of financial transfer through members of the community (1%).



GRAPH 24: USE OF FINANCIAL SERVICES



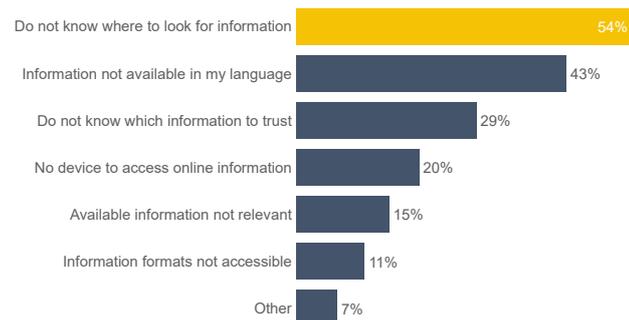
Accountability to Affected Population (see Annex for more graphs)

Access to information

While 51% of the respondents did not report any challenges in accessing information, access to information remains a challenge for the rest of the respondents, mostly because they do not know where to look for information (57%) or they do not trust the source (29%). Information is available but not accessible, either because of language barrier (43%), format barrier (11%) or lack of devices (20%) for online browsing.

Challenges vary based on accommodation type. For refugees in collective sites, identifying sources of information and trusted sources are the main challenges, while for refugees in private accommodation language barrier and identification of trusted sources of information are the key challenges.

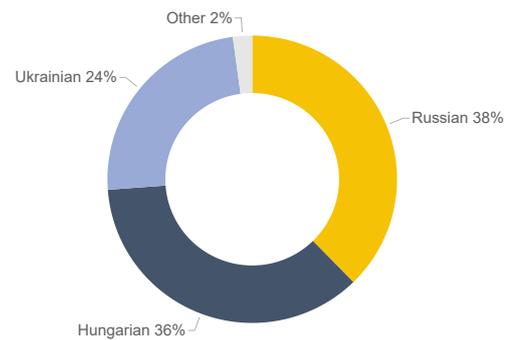
GRAPH 25: ACCESS TO INFORMATION CHALLENGES



Language

38% of the respondents reported Russian as the main language spoken in the household. This is in line with the results of a survey conducted by the Rasumkov Center ([link](#)) a sociological institute from Kyiv, Ukraine which conducted interviews with refugees in the region (51% of respondents answered that they mostly speak Russian at home, 40% — mostly Ukrainian).

GRAPH 26: MAIN LANGUAGES SPOKEN IN THE HOUSEHOLD



Feedback mechanisms and received assistance

Refugees indicated preference for individual face-to-face feedbacks options with aid providers about the assistance received, followed by more anonymous forms of feedback, such as social media, telephone calls and messaging applications.

GRAPH 27: TOP 3 PREFERRED FEEDBACK CHANNELS



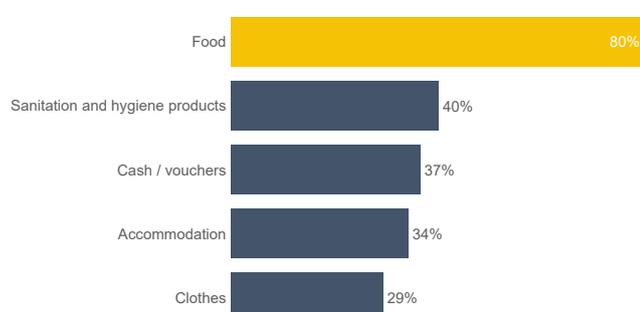
The majority of Ukrainian refugees (77%) have received some form of assistance during their stay in Hungary. The most common types of assistance received were food (80%), sanitation and hygiene products (47%) and multi-purpose cash/vouchers (37%). Refugees staying in collective sites indicated mostly receiving in-kind assistance such as food, accommodation, sanitary products and clothes. While those residing in private accommodation have more commonly received multi-purpose cash/vouchers (57%), as compared to (27%) in collective sites.



23%
of the respondents have **not**
received humanitarian assistance

The majority of those interviewed are satisfied with the assistance received in the past 30 days and consider the quantity, frequency and appropriateness equate with respects to their needs. Among the main reasons of dissatisfaction are conversely the insufficient quantity/frequency of the assistance and the poor quality.

GRAPH 28: TOP 5 TYPES OF ASSISTANCE RECEIVED



Conclusions

By providing multi-sectoral data about the needs and coping mechanisms of refugee households, the MSNA seeks to support an evidence-based humanitarian response to inform planning and programming by the humanitarian community under the umbrella of the 2023 Refugee Response Plan. This report specifically shows results for refugee households residing in Hungary at the time of the interview, either in Budapest or other counties, in collective sites or private accommodations. Due to the unpredictability and increasingly protracted nature of the situation in Ukraine, this assessment offers a picture of the situation and needs of refugee households as of Autumn 2022.

According to the results, 85% of the households interviewed are planning to remain in Hungary due to the ongoing conflict and have made more extended accommodation arrangements (6 months and longer). Only 6% declared the intention to leave their current place to return to Ukraine (3%) or a third country (3%).

Most refugees declared that their current accommodation arrangements are free of charge, while one out of four is paying partially or fully for the accommodation costs. 13% of the respondents are or currently feel pressured to leave their accommodation, with higher rates in Budapest (20%) compared to the rest of the country (8%) and for those who pay for their accommodation (17%). While in most cases, the pressure comes from the landlord, for refugees renting, the pressure to leave comes from the expected increase in utility costs.

Among the household refugees, there are specific profiles at heightened protection risks, for example, persons with disability (13%), older persons aged 60 and above (8%), children (44%), single-women headed household (84%), and separated families (53%) whose core household members are currently separated due to the war. Generally, refugees perceive their neighborhoods as safe for women and children. Over 90% of the interviewed refugees applied for themselves and their family members for TP status in Hungary and received at least once financial assistance from the government. Refugees seem to be generally aware of the implication of rights and duties related to the TP status in terms of access to education, health, and financial assistance.

From those interviewed almost 70% of children and young adults attended school regularly, mostly primary school (where the enrollment rate is at expected levels, less for kindergarten and secondary school). While overall enrollment data for Ukrainians in Hungary is not available, discussions in the Education Sub-Working Group point to a lower enrollment rate overall. In contrast, others were mostly enrolled online in Ukrainian school. Language worked as an enabling factor for school enrollment for children who speak Hungarian and as a barrier for Russian- and Ukrainian-speaking children.

Half of the respondents reported needing healthcare services in the previous 30 days, and 84% were able to access the needed care in Hungary through local health providers, in particular public hospitals and primary healthcare facilities. Among those in need but unable to access health care, the main reasons cited were refusal by the service providers to assist refugees due to a lack of knowledge on access to entitlements for Ukrainians in Hungary, waiting time, and language barriers. Significant barriers to accessing mental health and psychosocial support have also been identified.

Unemployment among refugees is high, as they are struggling to find suitable jobs in Hungary due to inter alia language barriers, childcare responsibilities and mismatching of skills/experience. Seven out of 10 interviewed refugees are currently not working, with a higher proportion among refugees in collective sites than in private accommodations. Due to the high unemployment rate among refugees, households reporting financial challenges in meeting their basic needs are as high as 40%, with a higher incidence in collective sites than in private accommodations. Also, employed refugees face challenges, as salary is not enough (26%) or not regularly paid (8%) to cover the needs of one month. This has protection implications, as refugees mostly spend their current savings, while others prefer to borrow money and/or reduce essential expenditures. 4% engage in harmful coping mechanisms, such as high-risk informal jobs, begging, and child labor. Also, two out of 10 interviewed households reported difficulties with access to food in the week before the interview. Consequently, in private accommodations and collective sites, those refugees reported relying on less preferred and less expensive food options and reducing the food portion.

The expenditure pattern of the interviewed households differs between the accommodation arrangements of refugees. In collective sites, where the government or humanitarian organizations cover food and rent, refugees mainly spend money on other food and non-food items, clothes, and health-related services. For refugees in private accommodation, the main expense in the average expenditure pattern is food, followed by rent, non-food items and health-related costs.

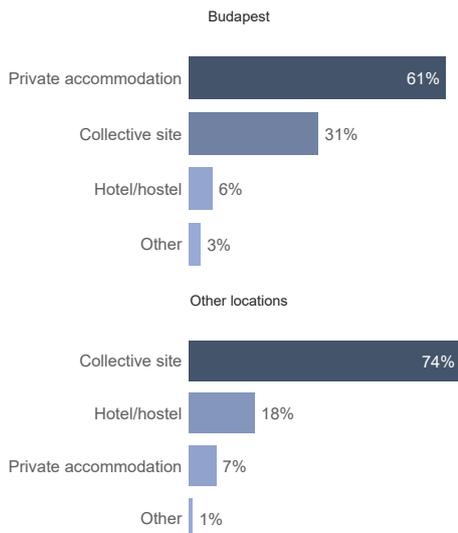
86% of respondents who received humanitarian aid expressed satisfaction with it; most frequently, those who were not satisfied said that this was because they did not receive enough assistance or not frequently enough. It is significant to note that households' top priorities are cash and vouchers, winter clothes, accommodation, and food. Additionally, they stated that their preferred methods of providing feedback were mostly through direct interaction, phone, and social media.

While there are different sources of information on the situation of refugees in Hungary, the findings of the MSNA are the first interagency and multisector source of data on refugees in Hungary. The preliminary results of the MSNA were presented to the Refugee Coordination Forum. They were also discussed with the chair/co-chairs of the technical working groups in Hungary and its members in October. The results, jointly with the outcome of the discussions, will inform the 2023 RRP, in particular, to identify the needs of refugees currently residing in Hungary and the level of the sector response. Partners will also use the findings to define the intervention in 2023, identifying priority interventions per sector.

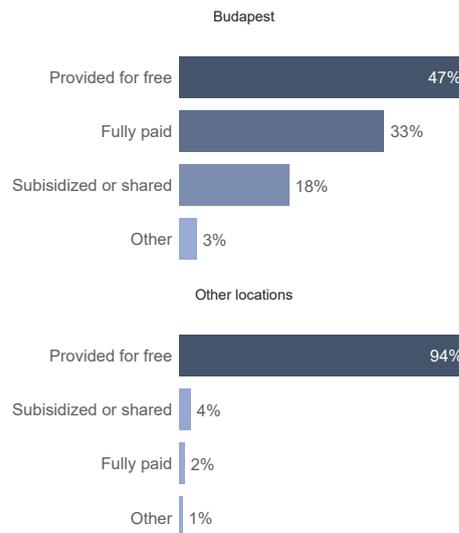
Annex

Accommodation

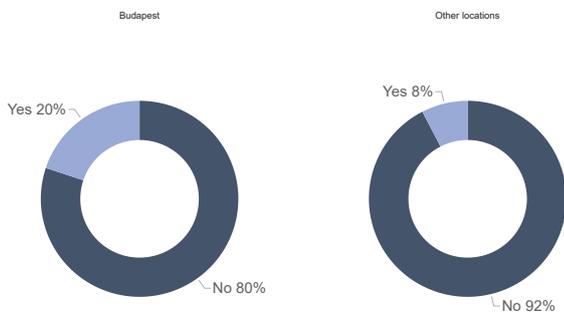
GRAPH 29: ACCOMMODATION TYPE BY LOCATION



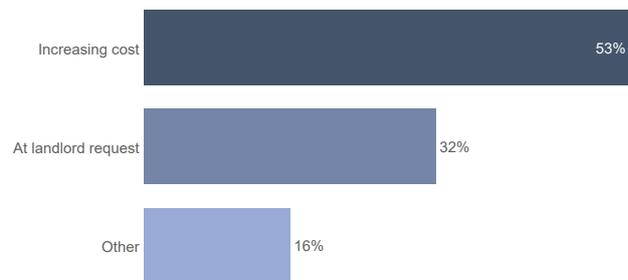
GRAPH 30: PAYMENT FOR ACCOMMODATION BY LOCATION



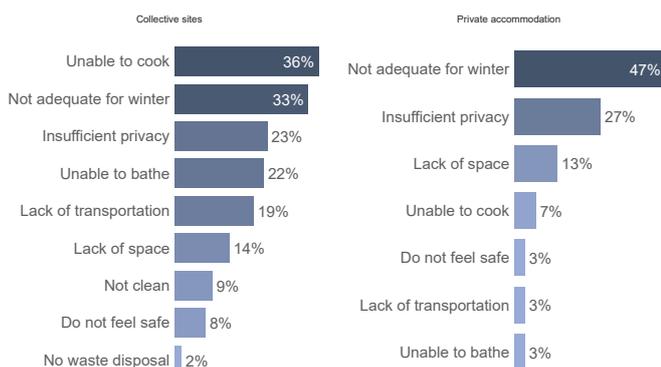
GRAPH 31: PRESSURE TO LEAVE BY LOCATION



GRAPH 32: REASONS FOR PRESSURE TO LEAVE (PAID/SUBSIDIZED ACCOMMODATION)



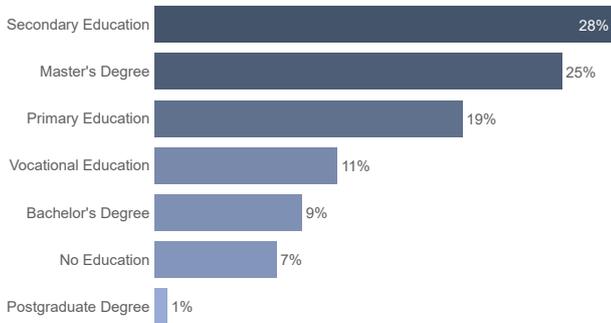
GRAPH 33: ACCOMMODATION ISSUES BY TYPE OF ACCOMMODATION



* Multiple responses were possible, so percentages can go over 100% when added

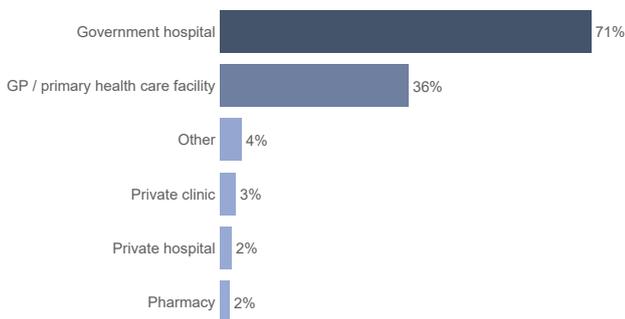
Education

GRAPH 34: HIGHEST LEVEL OF EDUCATION ACHIEVED



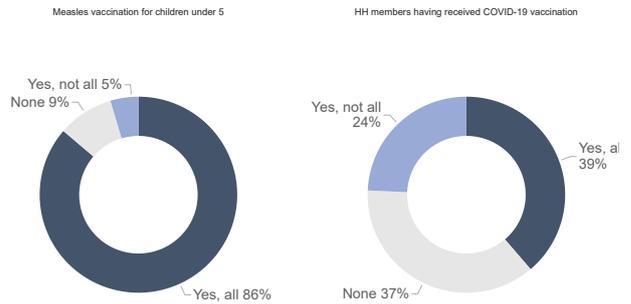
Health

GRAPH 35: TYPE OF SERVICE PROVIDERS USED



* Multiple responses were possible, so percentages can go over 100% when added

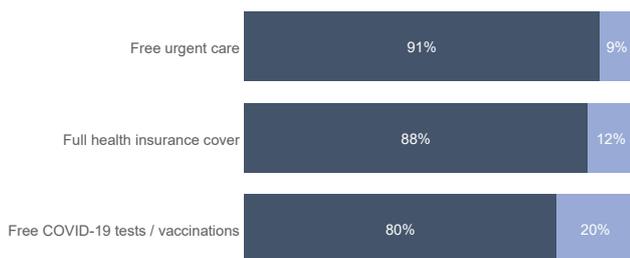
GRAPH 36: VACCINATION STATUS BY TYPE OF VACCINE



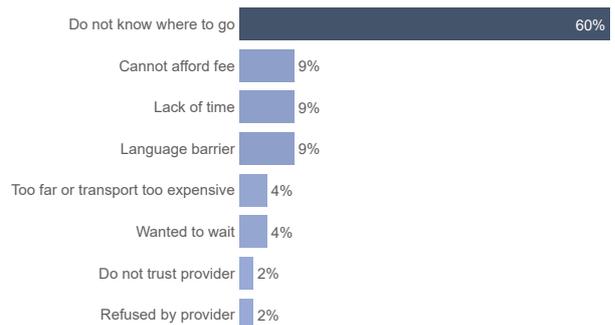
MHPSS

GRAPH 37: AWARENESS ABOUT ENTITLEMENTS

• Yes • No

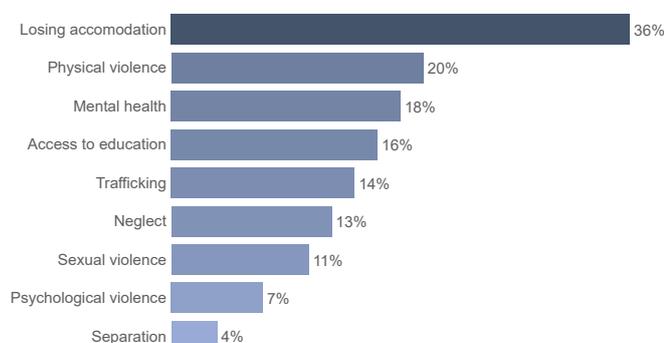


GRAPH 38: MAIN REASON FOR NOT ACCESSING SUPPORT



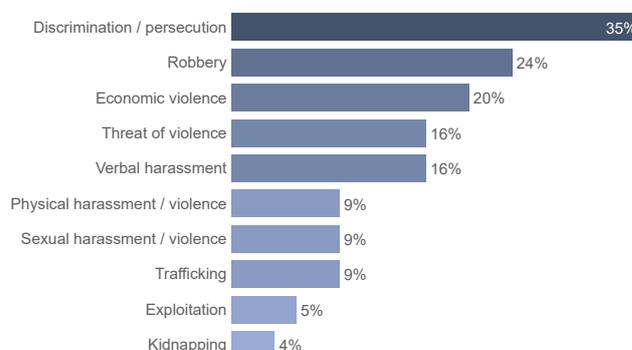
Protection

GRAPH 39: PROTECTION CONCERNS FOR CHILDREN



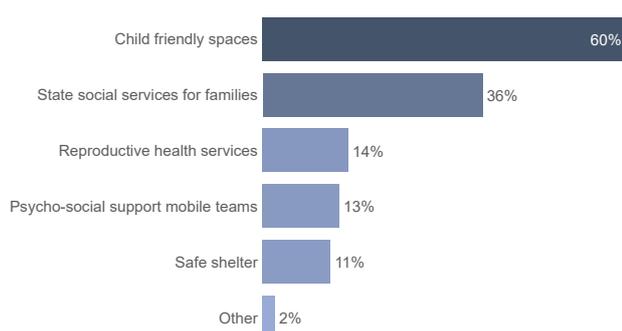
* Multiple responses were possible, so percentages can go over 100% when added

GRAPH 40: PROTECTION CONCERNS FOR WOMEN



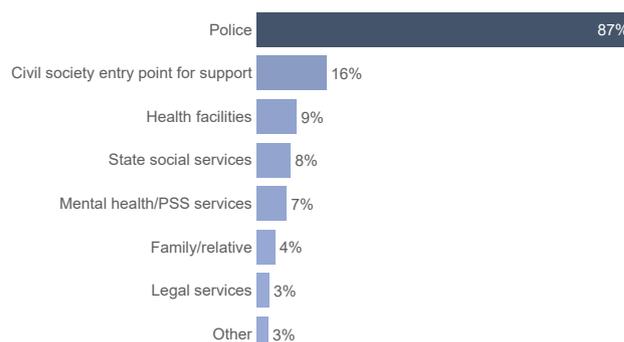
* Multiple responses were possible, so percentages can go over 100% when added

GRAPH 41: AWARENESS OF AVAILABLE CHILD PROTECTION SERVICES



* Multiple responses were possible, so percentages can go over 100% when added

GRAPH 42: PREFERRED REFERRAL POINT(S) FOR SURVIVORS OF GBV



* Multiple responses were possible, so percentages can go over 100% when added

Coping Mechanisms and Resilience

GRAPH 43: OCCUPATION TYPE(S) BY LOCATION

Occupation type	Collective sites	Other locations	Average
Formal work Hungary	62%	66%	65%
Informal labour	19%	15%	17%
Formal work other country	3%	9%	6%
Freelance	5%	4%	5%
Retired	6%	2%	4%
Student	5%	3%	4%

* Multiple responses were possible, so percentages can go over 100% when added

GRAPH 44: SECTOR(S) OF PREVIOUS WORK EXPERIENCE BY LOCATION (1%>)

Sector	Collective sites	Other locations	Average
Financial and insurance activities	11%	16%	14%
Domestic work	19%	8%	13%
Education	7%	10%	9%
Manufacturing	8%	9%	9%
Agriculture	10%	6%	8%
Construction	10%	6%	8%
Trade	9%	6%	7%
Medical activities	5%	6%	5%
Accommodation services	4%	4%	4%
Administrative and support services	3%	5%	4%
Other sector	3%	4%	4%
Beauty	2%	4%	3%
Social work	2%	4%	3%
Professional, scientific and technical activities	1%	4%	3%
Government or civil services	2%	3%	2%
Artisanal production	3%	1%	2%
Transp storage	2%	2%	2%
Energy	1%	2%	2%

* Multiple responses were possible, so percentages can go over 100% when added

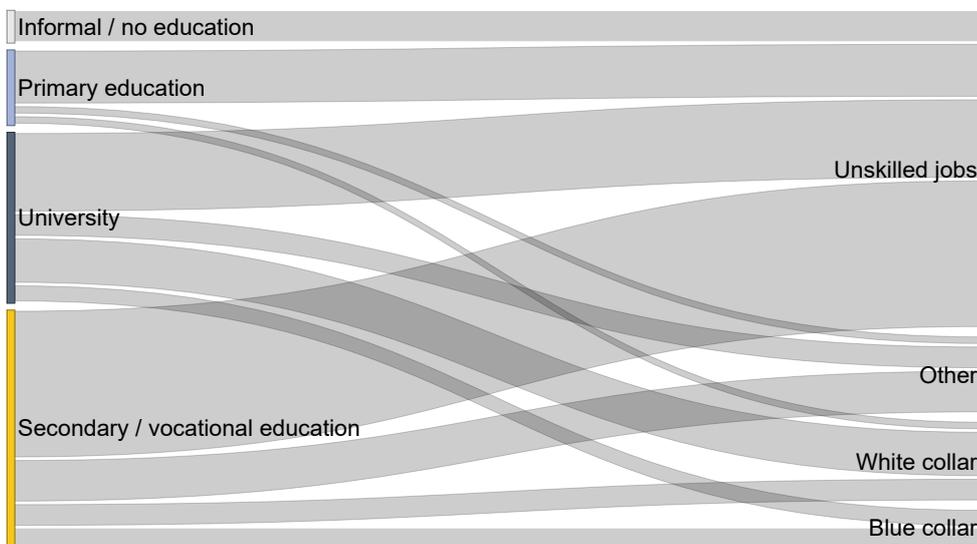
GRAPH 45: SECTOR(S) OF CURRENT WORK EXPERIENCE BY LOCATION (1%>) GRAPH 46: SOURCES OF INCOME BY LOCATION (1%>)

Sector	Collective sites	Other locations	Average
Manufacturing	33%	31%	32%
Domestic work	20%	14%	16%
Other sector	8%	19%	14%
Accommodation services	12%	10%	11%
Construction	13%	4%	8%
Administrative and support service activities		10%	6%
Agriculture	7%	2%	4%
Social work	3%	4%	4%
Trade	3%	4%	4%
Transportation and storage		4%	2%

Income source	Average	Collective sites	Other locations
Salaried work	60%	51%	65%
Daily labour	16%	22%	13%
Hungarian governmental social benefits / assistance	10%	13%	9%
Humanitarian help / charitable donations	5%	6%	4%
Remittances	4%	2%	5%
Ukrainian government social benefits / assistance	2%	3%	2%
Support from family / friends	2%	2%	2%

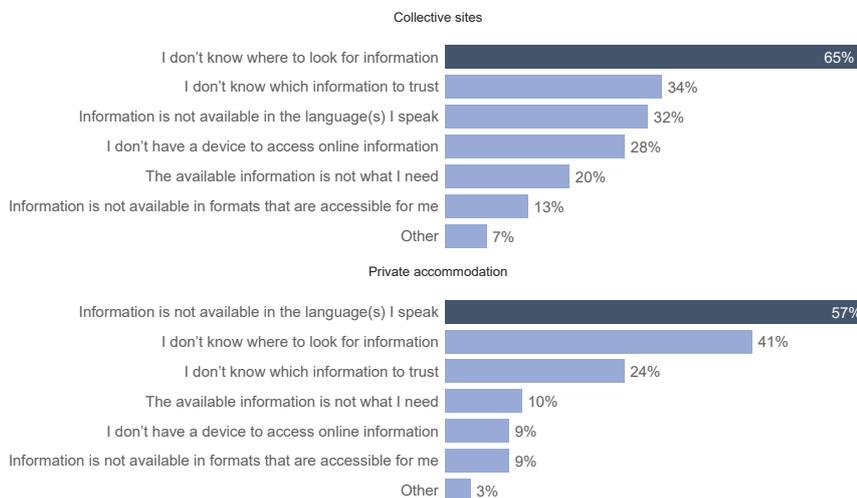
* Multiple responses were possible, so percentages can go over 100% when added

GRAPH 47: EDUCATION LEVEL VS. CURRENT SECTOR OF WORK



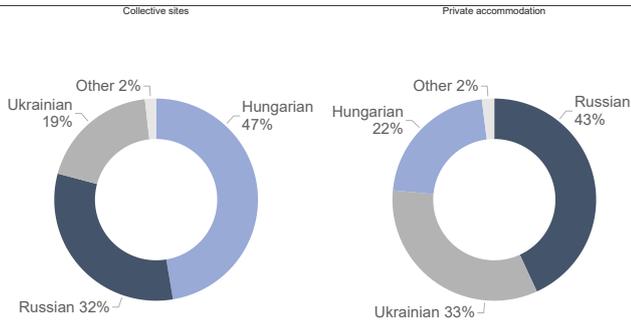
Accountability to Affected Population

GRAPH 48: CHALLENGES IN ACCESSING INFORMATION BY TYPE OF ACCOMMODATION

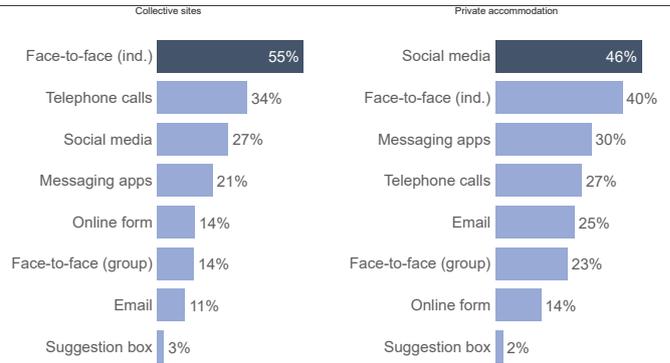


* Multiple responses were possible, so percentages can go over 100% when added

GRAPH 49: MAIN LANGUAGE SPOKEN IN THE HOUSEHOLD BY TYPE OF ACCOMMODATION

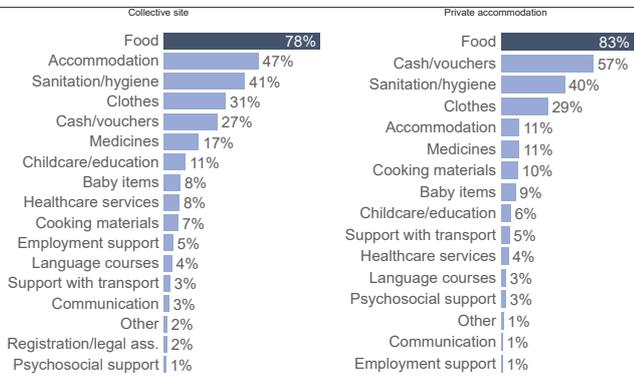


GRAPH 50: PREFERRED FEEDBACK CHANNEL BY TYPE OF ACCOMMODATION



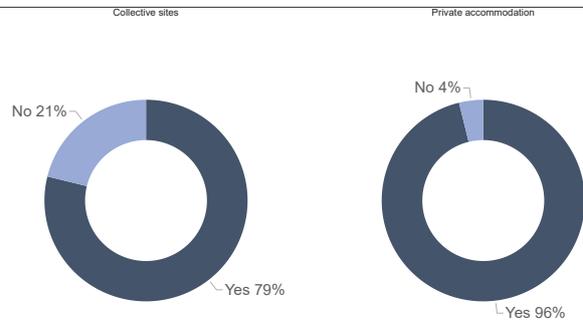
* Multiple responses were possible, so percentages can go over 100% when added

GRAPH 51: TYPE OF ASSISTANCE RECEIVED BY TYPE OF ACCOMMODATION



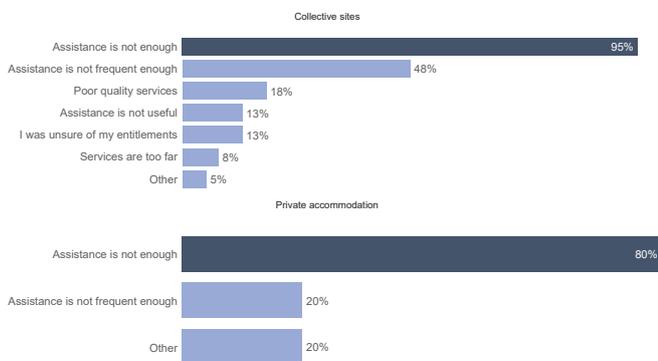
* Multiple responses were possible, so percentages can go over 100% when added

GRAPH 52: SATISFACTION WITH ASSISTANCE RECEIVED BY TYPE OF ACCOMMODATION



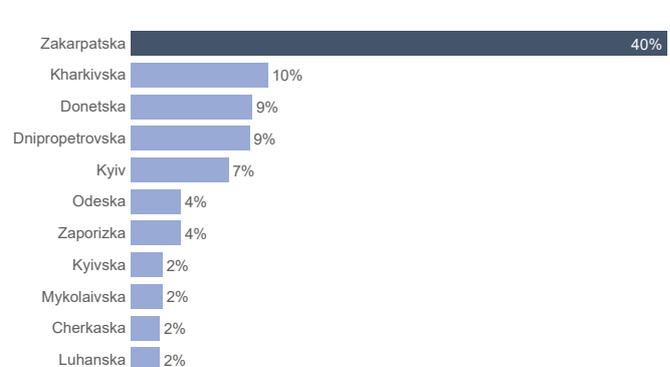
Respondent Profile

GRAPH 53: REASONS FOR DISSATISFACTION WITH AID RECEIVED



* Multiple responses were possible, so percentages can go over 100% when added

GRAPH 54: TOP 10 OBLASTS OF ORIGIN





Regional Refugee Response
for the Ukraine Situation

MULTI - SECTORAL NEEDS ASSESSMENT

November 2022

