

6 Counties
8 Municipalities
14 Enumerators

13,185 Interviews

81% female **19% male**

Starting 24 February 2022, the war in Ukraine triggered an unprecedented humanitarian crisis and generated large scale displacement both within Ukraine and to the neighbouring countries. As of 22 February 2023, over 8 million persons were internally displaced in Ukraine,¹ and starting 19 February 2023, over 113,000 individuals from Ukraine were recorded in Romania.²

This report is based on two different surveys, one conducted between 25 March and 10 October 2022 (Displacement Patterns, Needs and Intentions Survey), and one conducted between 1 August 2022 and 7 February 2023 (Urban Inclusion Survey). Both surveys were collected by IOM's Displacement Tracking Matrix (DTM) in Romania with adult refugees from Ukraine. First survey, Displacement Patterns, Needs and Intentions Survey, had 8,222 valid surveys and Urban Inclusion survey had 4,963 valid surveys. The report explores the challenges encountered by Ukrainian nationals since the end of March, considering the monthly changes, and focusing on inclusion needs, services and benefits, and labour.

Please note that this is not yet a representative sample and results should be taken as indicative.

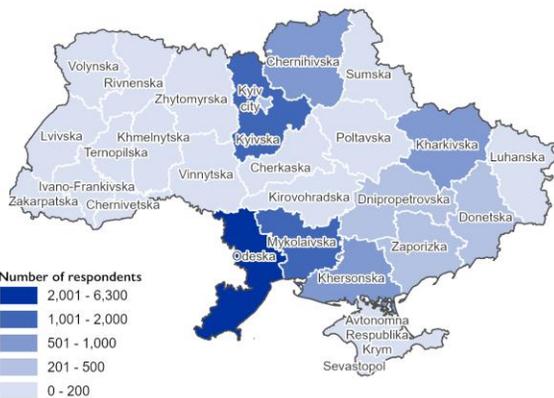
¹ UNHCR Individual refugees from Ukraine

² UNHCR Individual refugees from Ukraine recorded in Romania: [Ukraine Refugee Situation \(unhcr.org\)](https://www.unhcr.org/ukraine-refugee-situation)

SOCIO-DEMOGRAPHIC PROFILE

The report is based on 13,192 interviews conducted by IOM Romania between 25 March 2022 and 7 February 2023 mainly at collective centres, transit centres, bus stations, train stations, accommodation spaces, and other public places (schools, parks, shopping centres, event venues, etc.), with Ukrainian citizens living in Romania. Counties where interviews have taken place included Bucharest, Constanta, Tulcea, Iasi, Galati, and Suceava. The main five origin oblasts from which the respondents originated were Odessa (48%), Mykolaiv (13%), Kyiv (8%), Kherson (7%), and Kharkiv (4%).

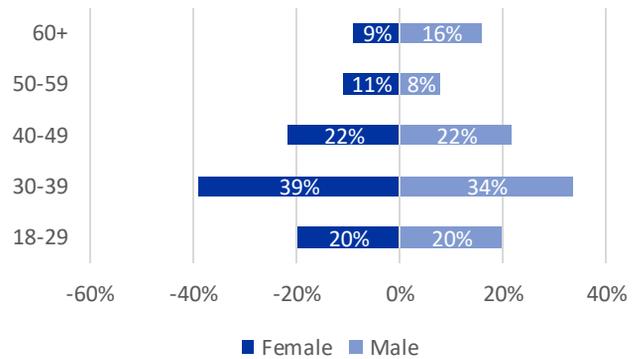
Fig. 1 Region of origin of respondents



This map is for illustration purposes only. The boundaries and names shown, and the designations used on this map, do not imply official endorsement or acceptance by the International Organization for Migration.

Women represented 81 per cent of responses. By age groups, the biggest group of the respondents were aged 30-39 (39%), while 9% were aged 60 or above. The percentage of incoming men, at the beginning of the humanitarian crisis was low (17%), but saw an increase in August (25%), starting November, the percentage of incoming male population lowered to 17%, decreasing one or two percent every month until February 2023.

Fig. 2 Gender and age disaggregation of respondents (%)



More than half of the respondents had higher education (58%), followed by 22% who had technical and vocational training, and 19% who had secondary education.

Tab. 1 Education level of respondents (%)

Primary education or lower	1%
Secondary education	19%
Technical and vocational training	22%
Higher education	58%

Of the total number of respondents, 84% said they were travelling in a group (with family, friends, relatives, or acquaintances). 75% reported at least one child in the group, whilst 45% stated they were travelling with at least one elderly person.

75% reported at least 1 child in the group

45% travelling with at least 1 elderly person (60+ years)

84% travelling as a group
10% travelling alone

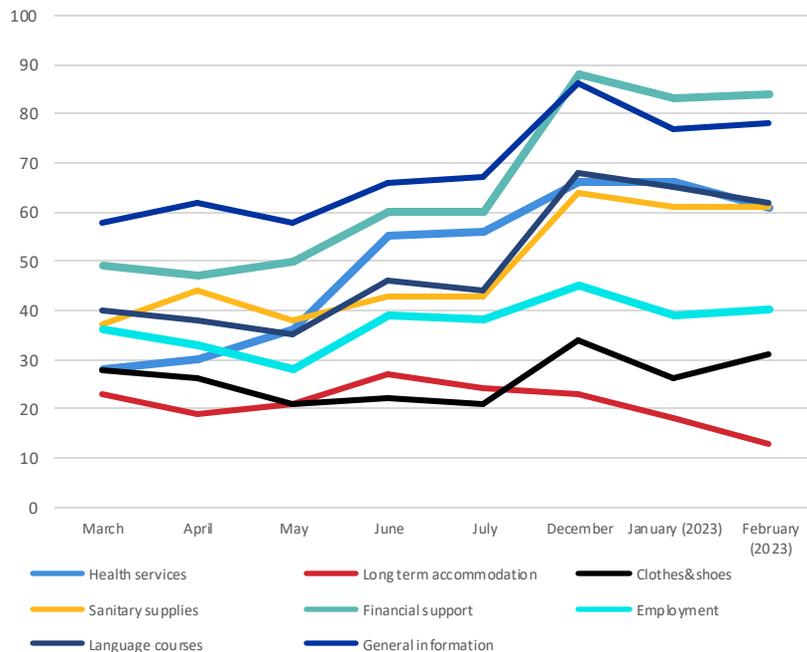
NEEDS BASED INCLUSION

The 'Urban Inclusion Survey' explores Ukrainian refugees' integration challenges in Romania, focusing on their own evaluation of the difficulties encountered. As a year has passed since the start of the war in Ukraine, this report was designed with the purpose of finding out if respondents' most essential needs were met (e.g., access to medical services, housing, social benefits, etc.), how various challenges were evaluated over time, but also to understand if Ukrainian refugees were actively participating to the social life.

The trend of basic needs displays significant variation across domains. One of the main changes shown by the data in Figure 3 relates to the hierarchy of needs in the past three months. From March to July 2022, most respondents mentioned the need for general information, placing it as the top need. However, since December 2022, it has been replaced by the need for financial assistance. With time spent in Romania, the financial resources available to the Ukrainian nationals went down, and the need for financial support went up.

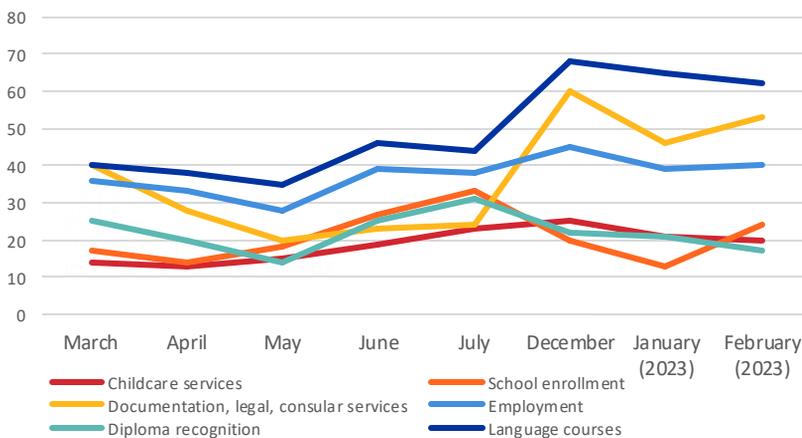
Due to the support of the wider humanitarian response, the need for long term accommodation never exceeded 25% of answers, and went down from June 2022. The needs for clothes and shoes grew from July 2022, as the combined outcome of the change of seasons and the extended stay in Romania. However, no more than 30% of those who answered to the survey mentioned it.

Fig. 3 Trends on basic needs March 2022 to February 2023 (%)



The data shows that, since July 2022, some of the basic needs have increased such as sanitary supplies, health services and financial support, while other went down, such as long-term accommodation, food supply, medicines. As for the decrease in the need for long-term accommodation was the outcome of the wider humanitarian response in Romania, 85% of the respondents reported to have stayed in rent-free accommodation, such as host families, friends or family, already paid for accommodation, or collective centers. An analysis on ease to find housing shows an increasing in find accommodation of over 21% from August 2022 to February 2023.

Fig. 4 Trends on integration needs March 2022 to February 2023 (%)



Among the needs related to social inclusion, the one for language courses has grown since May 2022, as the Ukrainians began to settle down in Romania and the need to acquire language skills grew in line with the time spent here. Over the same period, the need to get legal and consular support grew too. A constant increase was visible in case of employment, the share of those needing support to find employment growing with the time spent in Romania and with the reduction of financial resources available when they came from Ukraine. In spite of constant growth, the percentage of those needing support for finding a job did not go far beyond 40%.

ACCESS TO SERVICES AND BENEFITS

The ready access to services and benefits helps Ukrainian nationals in Romania to meet their needs and provides opportunities for successful social inclusion. The humanitarian response in Romania consists in a wide range of services and benefits, such as accommodation, food, clothing, language courses, livelihood support, and employment opportunities.

According to the data in Figure 5, the Ukrainians who responded to the surveys found the greatest challenges with support for finding jobs (17%), followed by medical services (16%).

When analysing access to services and benefits, one can notice two groups, services that are easily available to respondents, such as housing, legal status and residency, social benefits, medical services and cultural events, more than half of those interviewed reporting easy access.

The second group consist of services that are considered as redundant by most of respondents (answers “not applicable to me”), such as university education, diploma recognition, schooling for children, jobs and opportunities for lifetime learning. This cluster reflect the expectations of the respondents that their stay in Romania would be short term only and they would not need to do access services required for social inclusion in the host society, like diploma recognition required for entering the labour market or enrolling their children in the Romanian educational system.

Fig. 5 Access to services and benefits August 2022 to February 2023(%)

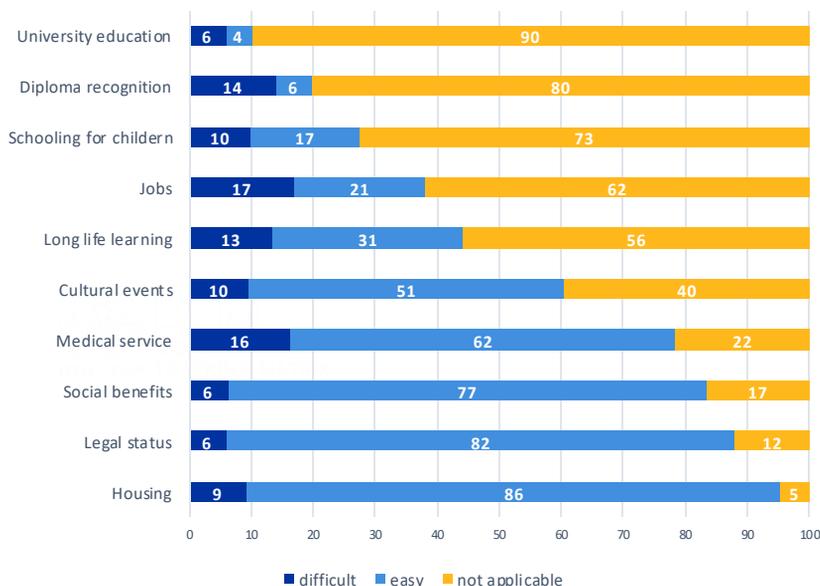


Fig. 6 Challenges in accessing benefits August 2022 to February 2023 (%)

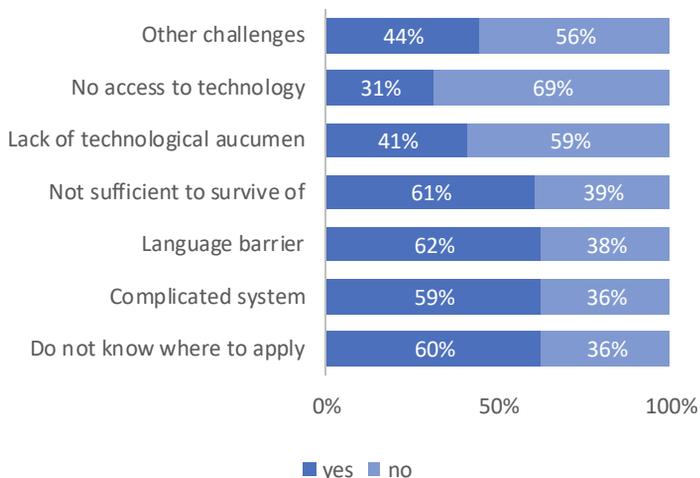


Figure 6 presents the main challenges experienced in accessing basic benefits, from August 2022 until February 2023.

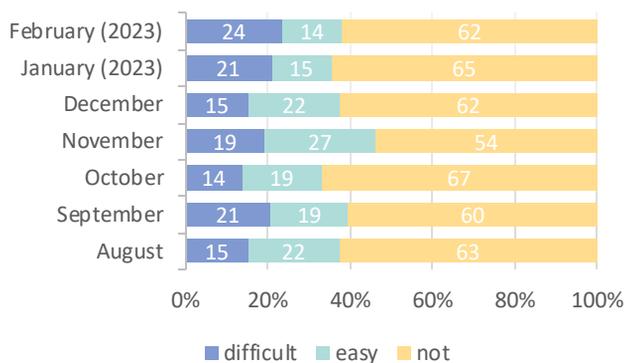
Language barrier was mentioned by the 62% of those answering the survey as the main challenge in accessing benefits, while 61% consider that the benefits provided were not enough to cover their needs. A similar share of respondents mentioned reasons related to lack of information regarding the benefits they were entitled to, such as the complexity of the system, or having no knowledge on how to apply.

Among the other challenges encountered by the refugees, the most frequent one mentioned was the lack of humanitarian hubs outside Bucharest. Long distances, expensive road trips, or difficulty to travel due to family reasons, were most often put forward as challenges in accessing benefits. Aside from that, other challenges cited were the long waiting periods to receive financial aid.

ACCESS TO LABOUR MARKET

According to the data, 34% of the Ukrainians interviewed had a job, while 24% had applied for one. Figure 7 presents respondents' assessment of how difficult the access to jobs had been, depending on the month of data collection. For most of the respondents, finding a job was neither easy, nor difficult, but 'not applicable', as they declared it. The percentage of those who said that finding a job is not one of their needs varied around 60% all over the reporting period. However, the share of those assessing access to job as easy went down from 24% in August 2022 to 14% in February 2023. At the same time, the share of those considering difficult to find a job grew from 15% to 22% over the same period.

Fig. 7 Difficult to find a job August 2022 to February 2023 (%)



The main challenge in finding a job reported was the language barrier, being mentioned by 85% of respondents. The second most frequent challenge was the lack of information regarding where to find a job (73%), while no jobs in the field of competence was in third place (62%). Thus, the lack of language skills and of information are the main barriers, and addressing these would be crucial for ensuring the access of Ukrainian nationals to the labour market in Romania.

Fig. 8 Challenges in finding a job (%)

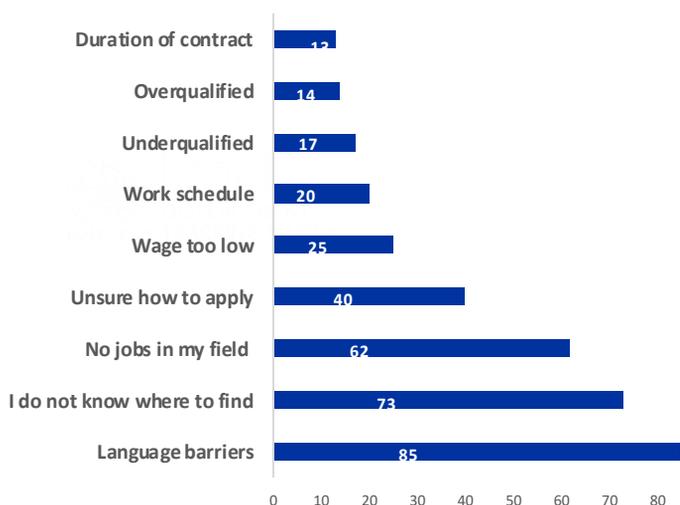
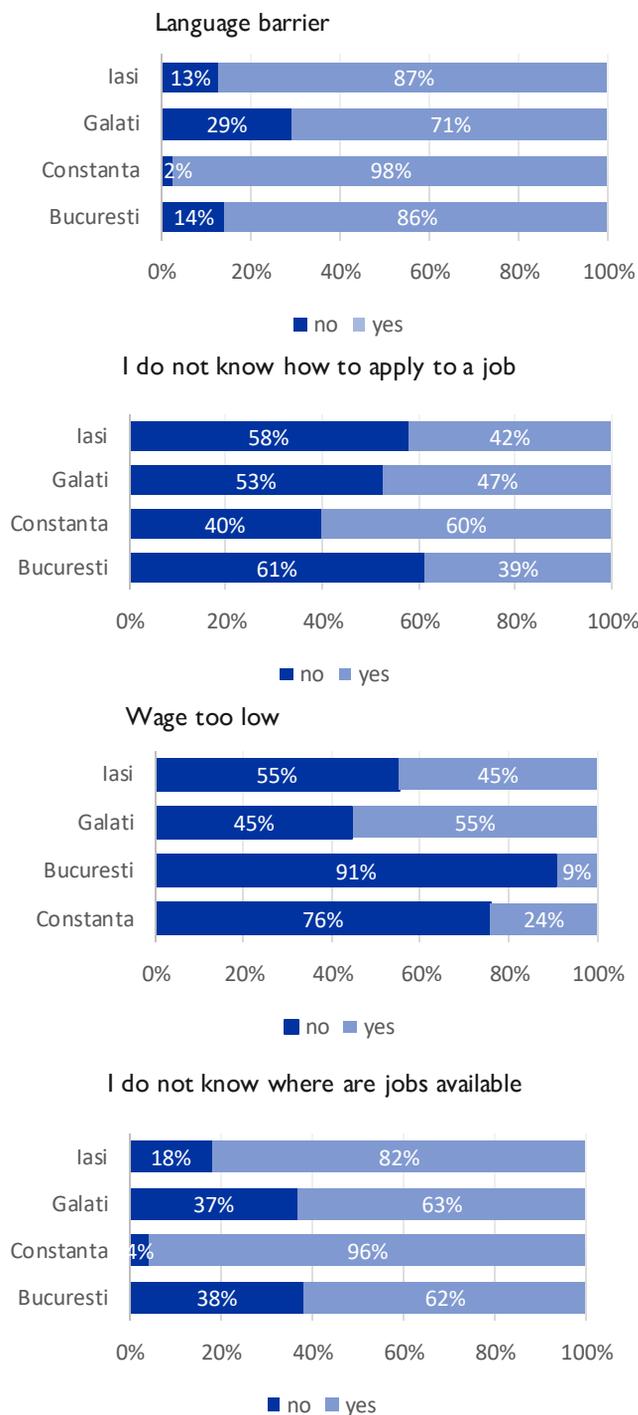


Fig. 9 Challenges in finding a job by county



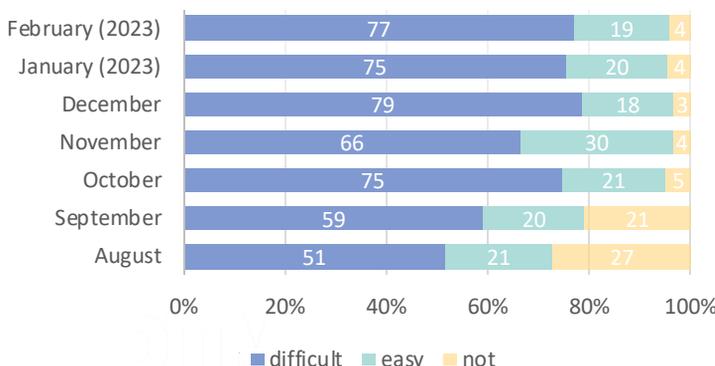
While the language barrier impedes labour market inclusion everywhere, there was high variability among the four main cities hosting Ukrainians. In Constanta, the majority of respondents declared they lacked information about how to apply or where to find a job. In Galati, 55% assessed wages as too low to be attractive, while in Iasi 82% did not know where to find a job. In Bucharest, information regarding labour market was better received and wages were more attractive for most respondents.

SOCIAL INCLUSION

As the language barrier seems to be the most important factor impeding access to the labour market, as well as access to benefits, the percentage of those who had taken language classes since their arrival in Romania is about 43%, out of which 31% took classes in Romanian language and 12% in English. However, 88% of respondents assessed their knowledge of Romanian as poor or very poor.

Moreover, as time goes by, the assessment of language's difficulty grew, as shown in Figure 10. The major change between August 2022 and February 2023 was in the shift from considering speaking Romanian as not applicable to their own situation, to assessing Romanian as being a challenge. The share of those assessing Romanian as difficult went up from 51% to 77%, while the one of those who consider Romanian as not relevant for them decreased from 27% to 4%.

Fig.10 Challenging to speak Romanian (%)



Real life social networks are one of the main components of social inclusion, indicating how well the Ukrainian nationals connect with their home and host countries. According to the data in Figure 11, the share of those considering the separation from their social network in Ukraine as challenging went down from 51% in August 2022 to 42% in February 2023, while the share of those who found it easy grew from 21% to 52%. At the same time, the percentage of those finding easy to make friends in Romania doubled over the past six months, from 36% to 74%. (see Figure 12) The data points to better social inclusion as time spent in Romania increased.

Fig. 11 Challenging to be separated from the social network in Ukraine (%)

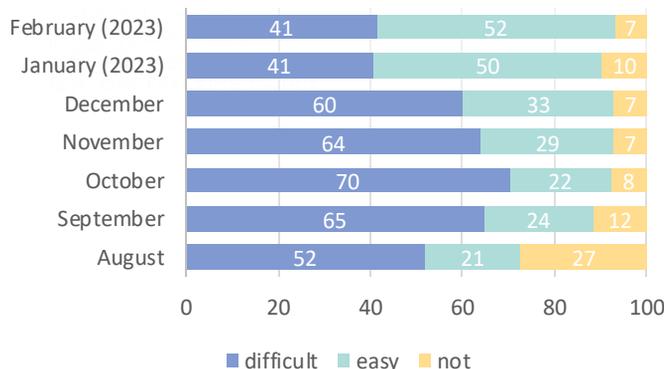
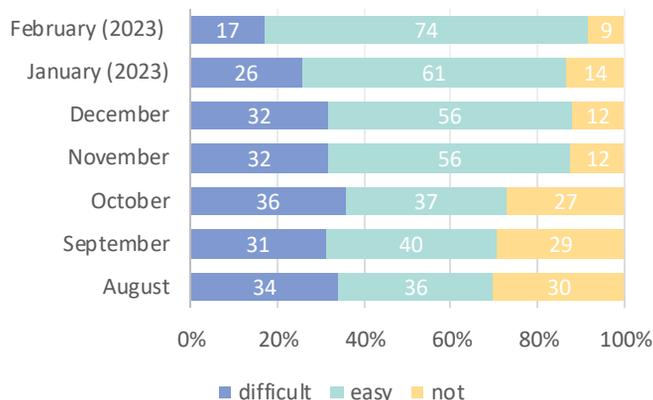
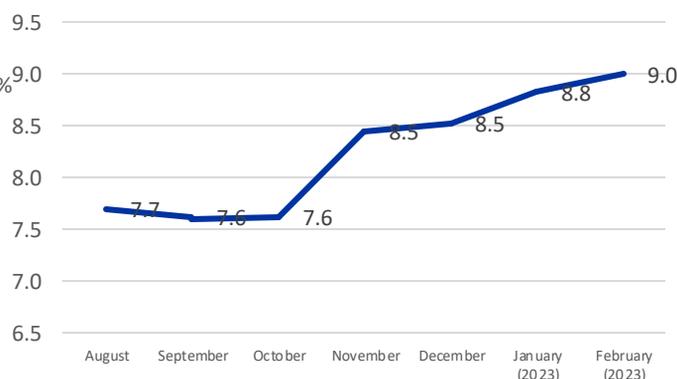


Fig. 12 Challenging to make friends (%)



Over the past six months, the individual wellbeing of Ukrainians in Romania went up constantly growing from the average of 7.7 to 9 on a 10-point scale. The constant growth of feeling comfortable points to constant progress in social inclusion in Romania, as shown in Figure 13.

Fig.13 Personal wellbeing (average on 10-point scale)



CONCLUDING REMARKS

Over the past year the process of social inclusion of Ukrainian nationals progressed in Romania. Although there are needs that are not met and challenges that require considerations, the Ukrainians interviewed by DTM enumerators generally had their basic needs met, such as accommodation, access to social benefits, and good connections with the local population. Consequently, their level of individual wellbeing grew constantly over time.

At the same time, the language barrier remained the biggest challenge for inclusion in the labour market, access to social benefits, and access to the healthcare system. As their financial resources diminished considerably with the time spent in Romania, additional support for learning Romanian and finding jobs would help the progress of social inclusion furthermore.

METHODOLOGY

Out of a total of 13,185 of interviews, 13,192 were considered valid and were used in this report. They were collected enumerators deployed in six counties in Romania: Bucharest, Constanta, Iasi, Suceava, Tulcea, and Galati. Over the entire period of time, 218 other interviews were conducted in other counties like Botosani, Brasov, Cluj, Maramures, and Mures. The majority of the interviews were held with respondents in Bucharest (36%) and Tulcea (22%). Enumerators included a mix of Ukrainian, Romanian, and Moldovan nationalities. They spoke Russian and/or Ukrainian, or English. All enumerators were trained on the ethics of data collection and provision of information. All of the active enumerators received training in protection, concerns and safer referrals as well as prevention of sexual exploitation and abuse, with further trainings scheduled. The questionnaire was available in Romanian, English, Russian, and Ukrainian and the preferred language of questioning was determined by the respondent.

Tab. 2 County in which the interview was conducted

County	Number
Bucuresti	4,783
Tulcea	2,847
Constanta	1,948
Suceava (Radauti, Siret, Suceava)	1,265
Iasi	1,075
Galati	1,056
Other	218

Closer to today's date, the main data collecting counties are Bucuresti, followed by Constanta, Tulcea, Iasi, and Galati. The data collected in Bucuresti includes respondents from the entire country, while the data in the other counties represent mainly respondents residing in the respective county.

Tab. 3 Type of location in which the interview was conducted

Location type	Number
Collective centre	20,911
Transit centre	1,685
Other	413
Train station	274
Bus station	191
School (i.e., language or public schools)	168
Local offices	56
NGOs	56
Refugee centres	36

Of the main location types in which the interviews were conducted, collective centres represented the majority of the total (33%). During

the first period of data collection, interviews were conducted at border crossing points (21%), followed by transit centres (16%). Closer to today's date, the main data gathering locations are collective centres (42%) and transit centres (34%). Other locations included public places in which respondents could be found, such as schools, bus and train stations, parks, accommodation spaces, shopping centres, event venues, refugee centres, NGOs, local offices, etc. The data is presented in Table 3.

LIMITATIONS

The sampling framework was not based on verified figures of Ukrainian refugees and TCNs staying in various counties or cities across Romania. This was due to the limited availability of baseline information. The geographic spread of enumerators deployed and locations targeted captures most of the key regions and locations in Romania. Whilst results cannot be deemed representative, the internal consistency within the data suggests that the findings of the current sampling framework have practical value.

Aside from a few cases, most interviews were conducted in settings specific to Ukrainians already residing in Romania and participating in daily life activities such as going to language classes, cultural centres, or local NGO's. As a result, the interviews were conducted in various location types, based on availability, in a less organised form.

Another important limitation to mention is the data from February 2023. Data collection for this report stopped on the 7 February 2023, further information from 8 February onwards will be included in the next report.

This report contains data from two surveys, one conducted since March 2022 until July 2022, with part of the questions reused starting December 2022 (Profiles and Inclusion), and one conducted since August 2022 until the first week of February 2023 (Urban Inclusion Survey). Even if this is the case, the data presented does not lack consistency and represents the main needs Ukrainian refugees encounter in Romania.

Since the start of the survey, we have conducted 13,192 interviews, with more survey completed close to the start of the humanitarian crisis, after which, the number of surveys completed every month reaching a plateau, as can be seen in Table 4.

Tab. 4 Number of interviews per month

Month	Number of interviews
March	371
April	2,266
May	2,153
June	1,423
July	1,919
August	972
September	794
October	736
November	690
December	734
January (2023)	804
February (2023)	330
Total	13,192