

RAPID NEEDS ASSESSMENT

Republic of Moldova

People in Need, Moldova CP, July August, 2022

Rapid Needs Assessment
Republic of Moldova



m e m b e r o f

Alliance 2015

towards the eradication of poverty

Table of Content

I. EXECUTIVE SUMMARY	3
II. INTRODUCTION	5
III. METHODOLOGY	6
IV. PROFILE OF SURVEYED POPULATIONS	8
1. Vulnerable Moldovan households	8
2. Ukrainian refugee households	8
3. Refugee-hosting households	9
V. NEEDS OVERVIEW	10
1. Shelter	10
2. Livelihoods and food security.....	13
3. Education	20
4. Assistance	21
VI. MARKET SURVEY	22

I. EXECUTIVE SUMMARY

The following report outlines the main findings of the rapid needs and market assessment that PIN conducted at the turn of May and June in 11 localities in six raions of Southern Moldova, including: Basarabia; Cahul; Ceadir-Lunga; Comrat; Taraclia; and Vulcanesti. The objective was to get a better understanding of the needs of Ukrainian refugee households (HH), Moldovan hosting HH and vulnerable HH to inform PIN’s humanitarian programming in light with the Ukrainian Refugee Response Plan and the overall impact of various crises the Moldovan population have been exposed to. The assessment concentrated on PIN’s main sectors of intervention, i.e. Shelter/NFI and Food Security and Livelihoods which to date is responded to via Multi Purpose Cash Assistance (MPCA). A market survey was included to inform the MPCA approach. Education and Protection related questions were included to inform future assessment needs for PIN’s further development of the programming given the reportedly high protection needs and PIN’s global expertise in Education in Emergencies.

As the majority of Ukrainian refugees (around 95%) live with Moldovan families for PIN the identification of the needs for both the refugee and host population is critical to respond principledly. In addition, in light with the Do No Harm principle and social cohesion the needs of vulnerable Moldovan HH irrespective of the status as “hosting HH” were assessed to inform a coherent response for the coming and especially winter months.

Following the assessment findings key general recommendations are:

- To review the methodology of humanitarian financial assistance to ensure it meets the affected population groups’ needs.
- To provide financial assistance to vulnerable Moldovan HH in addition to hosting and refugee HH.
- To provide assistance to affected population groups during cold winter months into 2023.

PRIORITY NEEDS	
SHELTER / ACCOMMODATION	<p><u>ACCOMMODATION</u></p> <ul style="list-style-type: none"> • The majority of surveyed vulnerable and hosting HH own their homes (respectively 95% and 98%), the remainder uses accommodation free of rent. • Two thirds of refugees stay in private accommodation (67%) and equally (16% and 16.5%) in collective shelters and shared flats, almost none pay rent or utilities bills. • 90% of hosting HH accommodate refugees in their own homes – and over 60% of them report overcrowding as an issue. However, overcrowding is not reported on the same level by refugees hosted in shared flats (reported by 39%). • Regardless of the status of the surveyed HH, accommodation concerns revolve primarily around <ol style="list-style-type: none"> 1) Inability to pay utilities for 88% vulnerable HH, 75% hosting HH, and 71% of refugees staying in private or shared flats. 2) Obsolescence and needs for rehabilitation for 80% of vulnerable HH, 69% of hosting HH, 71% of refugees. 3) Lack of adequate WASH facilities for 52.5% vulnerable HH, for 52% hosting HH and for 38% of refugees staying in collective shelters.
	<p><u>UTILITIES/ENERGY NEEDS</u></p> <ul style="list-style-type: none"> • Utility bills cut down a significant proportion of the HH income and is hence a significant challenge for any HH regardless of status: <ol style="list-style-type: none"> 1) 88% of vulnerable HH struggle to cover utilities: average cost during warm months = 1,226 MDL/month: average cost during winter months = 2,733 MDL/month. 2) 75% of hosting HH struggle to pay utilities that increased by two thirds since they started hosting refugees: average costs during warm months = 2,208 MDL/month; average cost during winter month = 3,891 MDL/month. In 31% of cases, hosted refugees do not pay any contribution. 3) 88% of refugees staying in shared flats consider the inability to pay utilities as a critical issue – 38% of them also fear the risk of eviction, a fear reported by only 3% of refugees staying in private flats and none in collective shelters.

	<p style="text-align: center;">PRIORITY FOR RESPONSE</p> <ul style="list-style-type: none"> • Review the methodology of humanitarian financial assistance to ensure it meets real needs, i.e. revise the amount and frequency of the assistance provided. • Provide financial assistance to vulnerable HH in addition to hosting and refugee HH. • Provide this assistance during cold winter months into 2023. • Identify opportunities for alternative accommodation for refugees, and support refugee HHs in finding a source of living. • Immediately start prepositioning financial and material resources for the winterization assistance.
<p>FOOD SECURITY & LIVELIHOODS</p>	<p style="text-align: center;">PRIORITY NEEDS</p> <p><u>SOURCES OF LIVING</u></p> <ul style="list-style-type: none"> • Social subsidies represent the main source of living for vulnerable and hosting HH, respectively at 44% and 38% as a primary source of living and 32% and 23% as secondary. Employment is only second in ranking and agriculture represents more a complementary source, especially for vulnerable HH. • Refugee HH are unequivocally highly dependent on external assistance – 70% rely on humanitarian aid or charity. • Nearly 50% of vulnerable and hosting HH have debts (48% and 46%), almost none has savings (5% and 8%). • In comparison, less than a third or 28.5% of refugees have contracted debts since the arrival in Moldova. 88% arrived with savings. 67% indicated having spent 75% or more of their savings. <p><u>INCOME AND EXPENSES</u></p> <ul style="list-style-type: none"> • The average monthly income is similar between vulnerable and hosting HH at respectively 5,137 MDL/month and 5,871MDL/month, but income level varies with the type of primary source of living and number of workers/employers in the HH: HH relying on agriculture as a primary source of living have a significantly lower monthly income than those relying on employment or small businesses. • Hosting HH report significantly higher monthly expenses than vulnerable households, respectively 5,167 MDL/month compared to 3,698 MDL/month. In both cases food represents the largest expense. Expenses are reported to not vary significantly per season. <p><u>SOURCES OF FOOD</u></p> <ul style="list-style-type: none"> • Local markets are the main source of food for 75% of vulnerable and 83% of hosting HH. • Humanitarian assistance or charity is the main source of food for 75% refugee HH. • Main challenges to access food for all surveyed HH are lack of money and increased prices of commodities. Additionally, for hosting HH increased expenses due to hosting refugees.
	<p style="text-align: center;">PRIORITY FOR RESPONSE</p> <ul style="list-style-type: none"> • Review the methodology of humanitarian financial assistance to ensure it meets real needs, i.e. revise the amount and frequency of the assistance provided. • Expand targeting and provide support not only to refugees and hosting HH but also to vulnerable HH. • Conduct regular market monitoring to timely reflect inflation. • Improve access to markets by rehabilitating/planning of roads to improve access to remote, isolated localities. • Identify opportunities for diversifying the sources of the living of the local population while including the integration of refugees.

EDUCATION	PRIORITY NEEDS
	<ul style="list-style-type: none"> • Education material needs were expressed by all HH. Expressed needs included: the need for a computer (40%), 15% requested textbooks in Ukrainian and 5% requested stationary in refugee HHs; funds for education (25%), computer for online learning (21%), access to education for children with disabilities (7%) for vulnerable HH; and a computer for online learning (19%), and school supplies (5%) for hosting HH. • Internet connectivity was also listed as a barrier to access to education by 30% of the refugee HH respondents.
	PRIORITY FOR RESPONSE
	<ul style="list-style-type: none"> • Understand the reasoning behind continued online education via the Ukrainian Ministry of Education for refugee children as opposed to integration in Moldovan schools. • Support online learning for refugee children who are attending classes through the Ukrainian Ministry of Education. • Mitigate the financial barriers to education for refugee and vulnerable Moldovan HHs including the provision of laptops/PCs, school supplies, school uniforms, etc.

*Questions can be directed to PIN Moldova Head of Emergency Response
Andrea Quaden: andrea.quaden@peopleinneed.net*

II. INTRODUCTION

More than 30 years after gaining its independence from the Soviet Union, the Republic of Moldova remains one of the poorest countries in Europe. The transition to the market economy in the 1990s was marked by a harsh economic collapse exceeding that of any other former Soviet republic. Since then, and although small progress was reached in a few areas, combined factors have contributed to maintaining the country low on the ladder of economic development. These include an over-reliance on unproductive agriculture, lack of adequate investments in the sector and low industrialization, rampant corruption, weak public institutions, and continuous brain drain - especially among the youth and specialized labour seeking better work and life options in other countries (as much as 15% of the country's GDP, or 1.2 billion USD, comes from remittances alone¹).

In the past two years, the country has been hit by a string of crises which further exacerbated the population's vulnerabilities. This began with the COVID-19 pandemic which led to a severe socio-economic crisis that saw the ratio of people living under the poverty line jump from 7.8% in 2018 to 14.2% in 2020. It continued with the "energy crisis" during the winter of 2021/22 marked by the steep rise in gas and electricity prices, to the galloping inflation worldwide in 2022 which reached almost 32% by June 2022². The Russian war in Ukraine has brought an additional burden to the small country, forced to accommodate almost 87,000 Ukrainian refugees³ among an exhausted population and with limited public resources. Only around 5% of the refugee population resides in government provided Refugee Accommodation Centers (RAC) while the majority resides with the host community.

The humanitarian community rapidly mobilized to provide support to conflict-affected populations following the February 2022 invasion. Yet, population groups are affected differently by the various crises affecting the country, but little information is available publicly about the various levels and types of vulnerability and needs among them. For this reason, and in order to collect data that would allow adjusting future emergency and recovery programs, PIN conducted a rapid assessment in the southern raions of Moldova in May 2022, among vulnerable populations, including vulnerable resident households, refugee-hosting households as well as refugee (Ukrainian) households.

PIN has been operating in Moldova since 2003, focusing on supporting local civil society organisations. Since December 2021, PIN Moldova has been implementing a project utilising multipurpose cash assistance to 40,000 households to mitigate the Moldovan energy crisis. From the onset of the conflict in Ukraine in February 2022, PIN has started to set up operations in Moldova to respond both to the needs of the refugees and to hosting communities. Being present in country since 2003, PIN has access and in-depth understanding of the situation at the local level, being able to connect with several local actors in the first months of the refugee crisis to assess the situation within the communities and their needs for support. In this regard, PIN has offered financial support to 27 local organizations working with refugees and has prioritized support to households hosting refugees (host-HH) to support access to decent living conditions for refugees and mitigate the socio-economic impact resulted from another crisis hitting Moldova.

III. METHODOLOGY

The assessment was carried out by PIN Moldova MEAL unit and PIN Global Humanitarian Advisor during the month of May 2022 in Southern Moldova. The South region of Moldova was selected as it is reportedly the poorest region of the country. The assessment was based on a multi-sectoral approach and considered factors such as type of location, presence of refugees, accessibility and remoteness.

The assessment was conducted in 11 localities in six raions, including: Basarabia; Cahul; Ceadir-Lunga; Comrat; Taraclia; and Vulcanesti. In order to ensure that data reflects the various realities of the people and that PIN gets a comprehensive understanding of capacities and needs in different contexts, the survey considered both rural and urban localities and both remote and non-remote areas – where remoteness was defined based on accessibility and proximity to main paved road.

¹ <https://www.cia.gov/the-world-factbook/countries/moldova/#economy>

² [https://www.bnm.md/en/content/inflation, projected to reach 40 % by end of the year](https://www.bnm.md/en/content/inflation,projected%20to%20reach%2040%20%20by%20end%20of%20the%20year)

³ <https://data.unhcr.org/en/situations/ukraine/location/10784> (last update 25.7.2022)

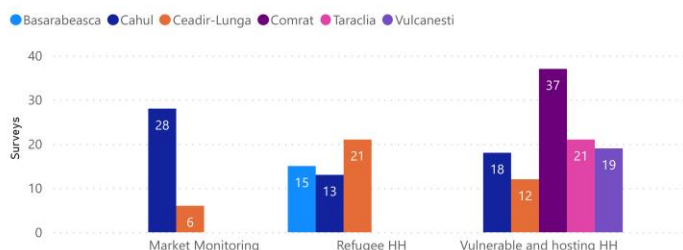
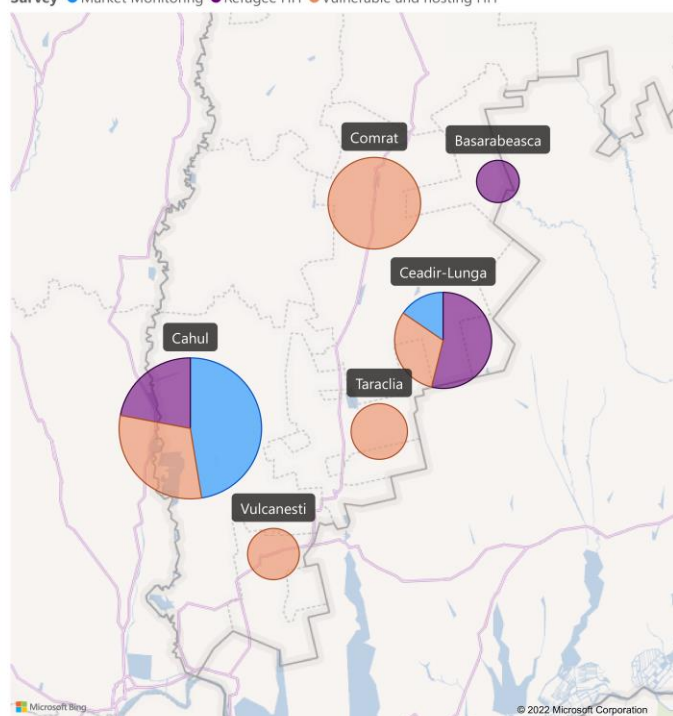
The methodology for data collection was based on HH surveys with vulnerable HH, refugee-hosting HH and Ukrainian refugee HH, as well as a market survey including interviews with vendors.

The breakdown of surveys per localities is shown in the table below:

		Refugee HHs	Hosting HHs	Vulnerable HHs	Vendors
Rural	Remote	20	17	20	11
Rural	Non-remote	8	7	11	5
Urban	Non-remote	21	24	28	15
Total		49	48	59	31

Household Assessments

Survey ● Market Monitoring ● Refugee HH ● Vulnerable and hosting HH



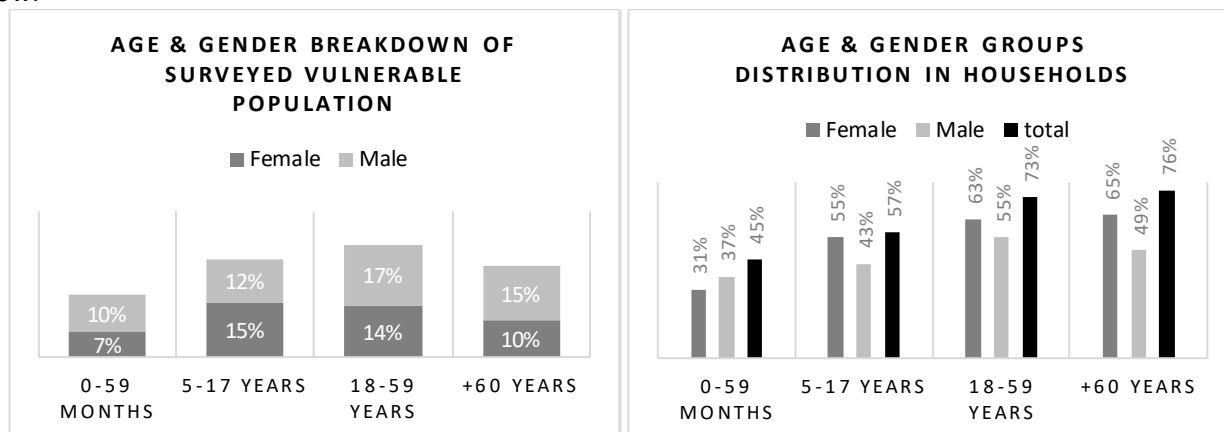
Rayon	Market Monitoring	Refugee HH	Vulnerable and hosting HH	Total
Basarabasca		15		15
Basarabasca		15		15
Cahul	28	13		59
Alexandru Ioan Cuza		13	8	21
Bucuria	10			10
Cahul	18			18
Lebedenco			10	10
Ceadir-Lunga	6	21		39
Basarabasca		3		3
Besghioz		18		18
Ceadir-Lunga	6		12	18
Comrat			37	37
Comrat			19	19
Congaz			18	18
Taraclia			21	21
Lebedenco			3	3
Valea Perjei			18	18
Vulcanesti			19	19
Vulcanesti			19	19
Total	34	49	107	190

The survey methodology was developed by PIN Global Humanitarian Advisor, and was then transferred into KOBO by PIN Moldova’s Database Specialist. Data was collected electronically by four enumerators, split in two teams. Prior to the data collection phase, PIN Moldova MEAL Manager spent two days training the enumerators on the questionnaires, including on-the-job.

IV. PROFILE OF SURVEYED POPULATIONS

1. Vulnerable Moldovan households

On average, surveyed vulnerable HH were comprised of 3.7 members. The age and gender breakdown of the surveyed vulnerable population, and the distribution of age groups in households is detailed in the two tables below.

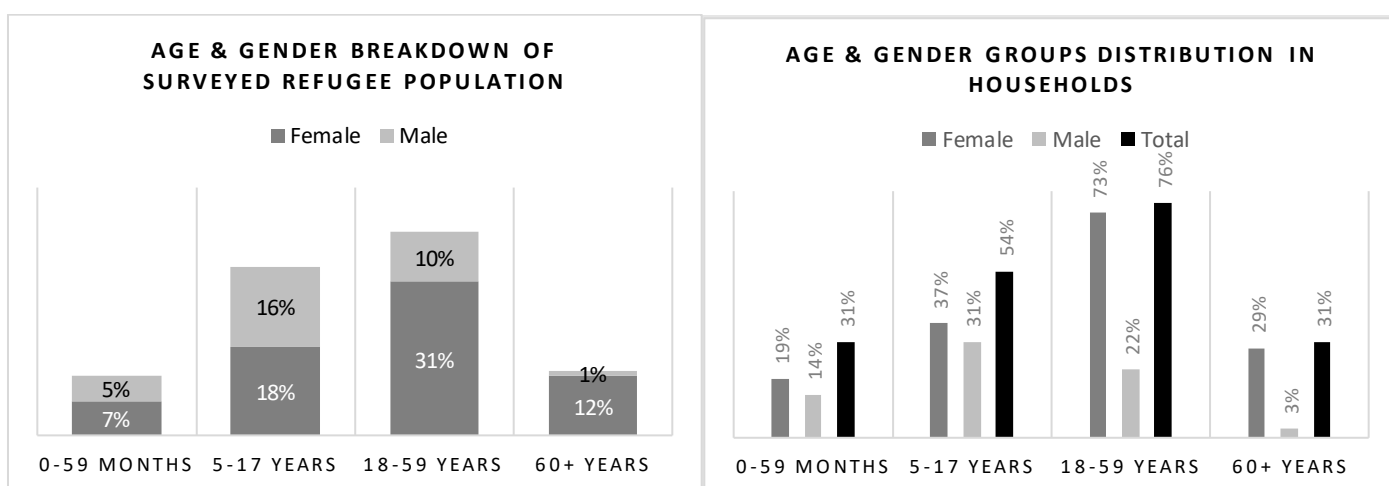


- In 73% of cases (36 households), there was at least one adult under 60 years old with no particular discrepancies between men and women. All other households have at least one adult over 60 years old. No child headed HH was identified.
- **Nearly half of all surveyed vulnerable HH (45%) have infants or children under 5 years old**, and among them 15% (9 households) have two or more children.
- 7 HH reported pregnant or lactating women, but **39 HH reported one (28 HH) or two (11 HH) chronically sick or disabled persons.**

2. Ukrainian refugee households

Demographic profile

On average, the surveyed refugee HH were comprised of approximately 3.1 persons. The age and gender breakdown of the surveyed vulnerable population, and the distribution of age groups in the HH is detailed in the two tables below.



- **Nearly 75% of surveyed refugee HH (36 out of 49 HH) have an adult man aged 18 to 59 years present in the location.** In general, an adult woman aged 18-59 years (in all but 4 households) is a HH member. Up to 58% of those 36 HH reported that the husband and/or father stays in Ukraine.

- Where an adult man under 60 years was present, it was generally in the HH that had 2 to 3 adults under 60 years – roughly one third of the cases. In HH where there was only 1 adult under 60 years present in the location, it was almost always a woman (27 out of 29 HH).
- **Elderly men (60 years or older) were notably underrepresented**, with only 2 out of the 49 HH reporting a man over 60 years in their HH compared to 18 HH reporting a woman over 60 years in their HH in the location. However, the available data does not allow inferring that elderly men would stay in Ukraine more than elderly women.
- Among all surveyed HH, one case of a child-headed HH was identified.
- As many as 39% of HH had an infant or young child with them at the time of the survey, and 65% had children between 5 and 17 years of age – boys and girls relatively equally represented, respectively 37% and 45%.
- 4 HH reported pregnant or lactating women, half (24 HH) reported one (22 HH) or two (2 HH) chronically sick or disabled members.

Displacement patterns

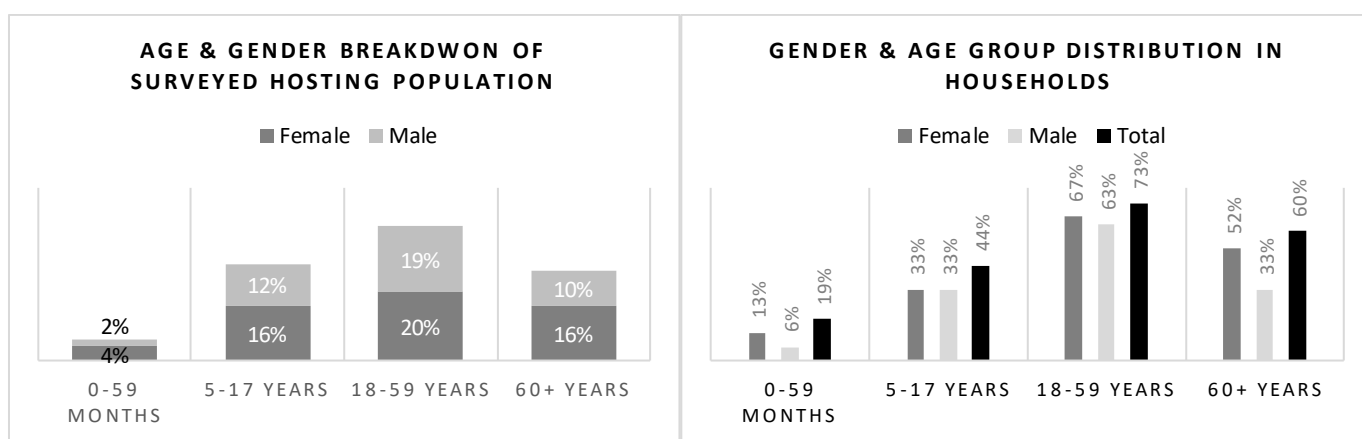
The vast majority of surveyed refugee HH came originally from the following oblasts: Odessa (63%, 31 HH), Nikolaev (16%, 8 HH) and Dnipropetrovsk (8%, 4HHs).

The majority of HH (81%) left Ukraine in February and March 2022. Some left in April or May confirming that the displacement movement continued at the time of data collection. For nearly 80% it took less than a week to reach their current location. For the remainder it took between 18 days and 3 months to reach their current location. This is not linked to distance or the fact they would come from remote Ukrainian oblasts (many who took up to 3 months came actually from the Odessa oblast) but rather that they stayed elsewhere on the way.

The majority, 69%, chose their destination to join friends or relatives. 16% were directed there by humanitarian actors or Moldovan authorities. 16 HH reported planning to move to another location with the majority (14) planning to return to Ukraine. However, they were not able to indicate the time for the return.

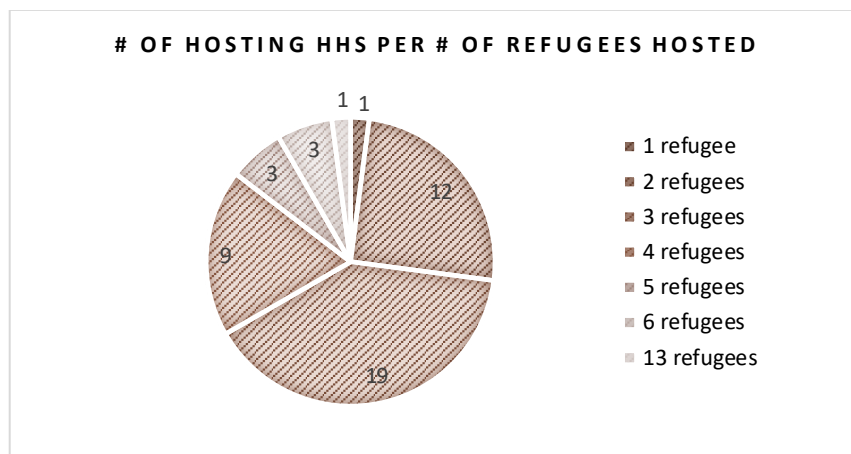
3. Refugee-hosting households

On average, the hosting HH were comprised of 3.5 members. The age and gender breakdown of the surveyed vulnerable population, and the distribution of age groups in households is detailed in the two tables below.



The composition of hosting households is very similar to that of vulnerable households. Yet they have notably fewer children under 5 years old (in 19% of surveyed HH only compared to 45% of vulnerable HH), as well as fewer children under 18 years (44% of hosting HH compared to 57% of vulnerable HH) or adults over 60 (60% of hosting HH compared to 76% of vulnerable HH). This may explain partially their greater ability to host additional persons, compared to the vulnerable HH. None reported pregnant or lactating women and 23 reported one (16 HH) or two (7 HH) persons with a chronic disease or disability.

On average, a hosting HH shelters 3.4 refugees, with the majority hosting 2 to 3 refugees (one HH reported hosting up to 13 persons).



The hosting duration varies with no specific pattern identified during this assessment, though the majority of hosting HH (21) started hosting the current refugees in March, while other HH host since either February (11), April (12) or May (4). The majority (38 HH) report not knowing how much longer they will be able to host refugees. 4 HH stated they could continue hosting for 2-3 months and 5 for 1 more month.

The majority (43) hosts refugees in their own homes, another four HH host refugees in a different house that is owned by them, and one HH host them in a house that is not owned by them.

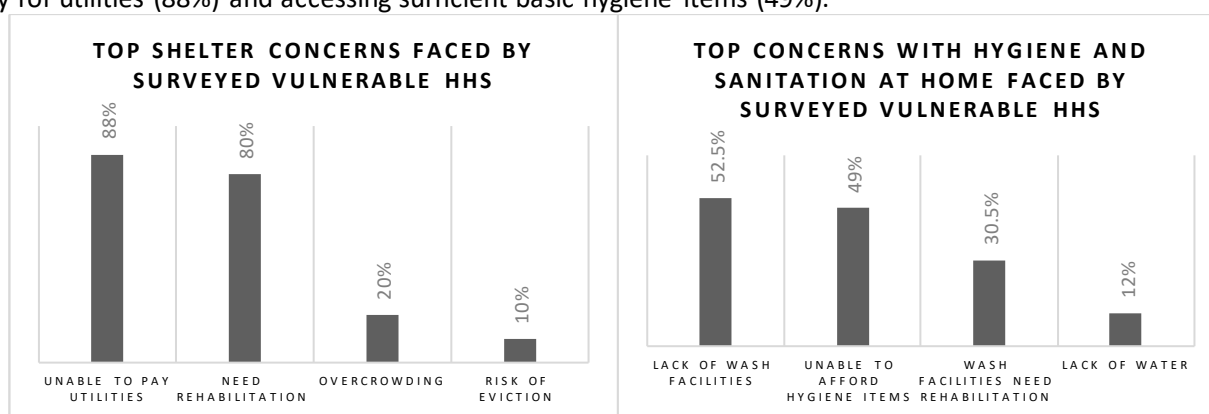
V. NEEDS OVERVIEW

1. SHELTER

Vulnerable households

The vast majority of HH own their own homes – 56 out of 59 surveyed HH (95%). The remaining three are either using a house free of charge (1) or renting (2) but those are also stating they currently pay no rent.

Vulnerable HH often live in old homes that are damaged or need rehabilitation (80%), and often also lack adequate hygiene and sanitation facilities (52,5%). Surveyed vulnerable households also reported struggling to pay for utilities (88%) and accessing sufficient basic hygiene items (49%).



Vulnerable HH reported paying substantial amounts for electricity, gas and running water, which significantly vary between colder and warmer seasons especially for gas, as can be seen in Table 1 below:

Table 1: Average utility bills of vulnerable households, per month in Moldovan Lei

	# of reporting HHS (out of 59 surveyed)	Summer months	Winter months	Variation summer/winter
Gas	58	691	2,109	+205%
Electricity	59	396	487	+23%
Running water	52	139	137	-1.5%
<i>Total</i>		<i>1,226</i>	<i>2,733</i>	<i>+123%</i>

Out of the 59 households, 13 (22%) reported purchasing additional heating material in winter months, worth on average 1,123 MDL. However, their monthly gas bill is notably lower than for HH who have not reported purchasing additional heating material during winter months, eventually cancelling out the differences in expenses, as can be seen in Table 2 below:

Table 2: Average winter bills of vulnerable households using or not using heating material, in Moldovan Lei

	HHs using only gas/electricity	HHs using gas, electricity and additional heating material
Gas	2,343	1,118
Electricity	457	592
Heating material	0	1,123
<i>Total</i>	<i>2,800</i>	<i>2,833</i>

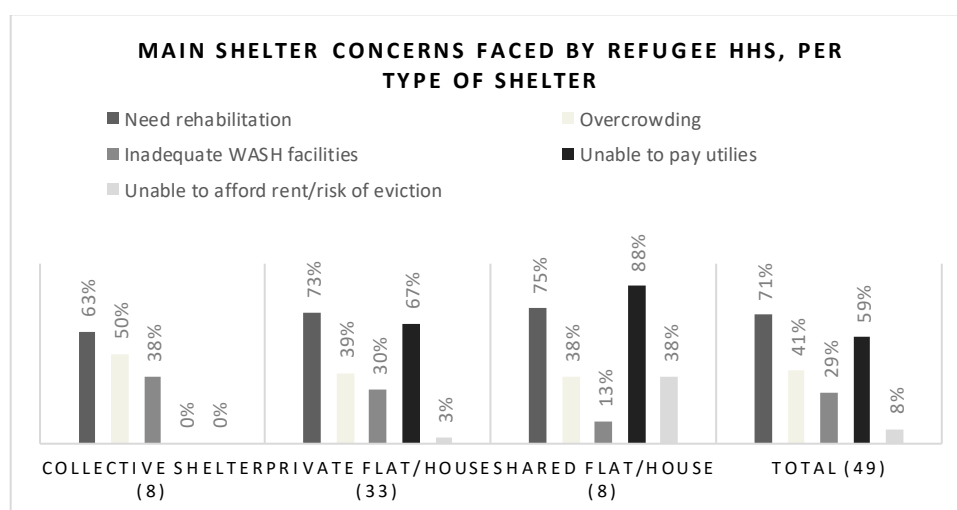
Regardless of the type of energy used, **energy expenses represent a sizeable portion of the HH’s monthly income:**

- On average, surveyed vulnerable households reported that their income amounted to 5,137 MDL in the month preceding the survey. This means that on average, **24% of the monthly income is spent on energy expenses in the warmer season.**
- Considering that, as will be seen in a later section on livelihoods, the majority of surveyed HH rely on relatively stable sources of income not dependent of seasonal variations (i.e. social subsidies, employment), it can be assumed that a HH’s income does not significantly vary with seasons. This means that **in winter months, more than 50% of the monthly income can be spent on energy expenses.**

Refugee households

Unlike vulnerable HH, surveyed refugee HH stay in a variety of settings, however the majority (67%) stay in private flats or houses, while the remaining third stays equally in shared flats/houses or in RAC (approx. 16.5% each). There appears to be no correlation between the type of accommodation and the type of locality (urban or rural, remote or not remote) refugees are staying in.

The type of challenges they face with their shelter are similar, though their importance varies depending on the type of shelter, as can be seen in the chart below.



While the risk of eviction remains low in private homes and inexistent in RAC, it is proportionally elevated in the cases where refugees are hosted in a shared home. The risk is reported by 3 out of 8 HH. This seems not necessarily linked to overcrowding, but to the refugee HH’s inability to support the hosting household by paying utilities.

Shelter-related expenses that refugee HH pay depend very much on the type of shelter they stay in:

- Refugees staying in Refugee Accommodation Centres do not pay any rent or utility bills.

- The majority (7 out of 8 HH) of refugee HH staying in shared homes do not pay rent or utilities.
- Approximately half (18 out of 33 HH) of refugees staying in private homes pay rent or utilities.

Table 3: Average bills of refugee households in private homes, per warm month, in Moldovan Lei

	HHS in private home
Gas	516
Electricity	375
Running water	140
<i>Total</i>	<i>1,031</i>

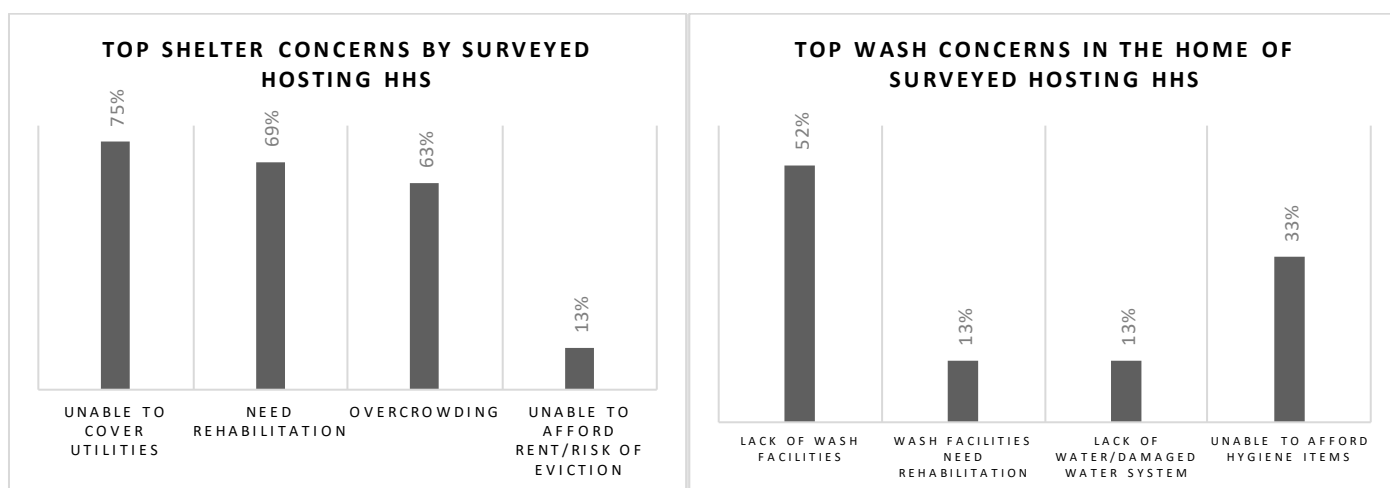
The amounts paid by refugees in private homes are relatively similar to those paid by vulnerable HH in the same period (warmer months). However, out of the 18 HH five reported not earning any income in the month preceding the survey, and four reported having spent 50% or more of their savings since their arrival in Moldova (one HH reported coming with no savings). The remaining 13 HH reported an average income of 4,215 MDL in the month preceding the survey – but also reported having spent 50% or more of their savings (one HH reported coming with no savings).

It is not possible to draw conclusions about the expenses spent by HH in shared homes considering that there is only one respondent – for this reason it is not considered in the report.

Refugee-hosting households

Practically all (47 out of 48) surveyed refugee-hosting HH own their homes – the only one not owning their home reported using it free of charge.

Hosting HH often live in an accommodation that is damaged or needs rehabilitation (69%), and as vulnerable HH, also lacks adequate hygiene and sanitation facilities (52%). They also suffer from overcrowding in their homes, which is likely related to them hosting refugees since the majority (43) host refugees directly in their own home (see IV. Profile of surveyed populations). Surveyed hosting HH also reported struggling to pay for utilities (75%).



Utility bills represent a high expense for hosting HH, as can be seen in Table 4 below. The hosting HH reported that

- bills jump up by more than two thirds when they host refugees. Expenses for gas, electricity and running water all increase more or less in the same way;
- bills jump by over three quarters in winter months. In winter months, it is essentially the gas bill that skyrockets (gas is largely used for heating).

Table 4: Average utility bills of hosting households, per month in Moldovan Lei

	# of reporting HHs (out of 48)	Warm months while hosting	Warm months not hosting	Variation hosting/not hosting warm months	Winter months	Variation summer/winter
Gas	47	1214	772	+57%	2,895	+138%
Electricity	48	689	347	+96%	707	+2.5%
Running water	44	305	169	+80%	289	-5.5%
Total		2,208	1,288	+71%	3,891	+76%

Out of the 48 HH, about a third (14 HH) reported purchasing additional heating material in winter months, worth on average 3,075 MDL. Unlike vulnerable HH though, while their monthly gas bill is notably lower than households who have not reported purchasing additional heating material in winter months, their total bills are notably higher (by approximately 35%) than those not using heating material, as can be seen in Table 5 below:

Table 5: Average winter bills of hosting households using or not using heating material in winter months, in Moldovan Lei

	HHs using only gas/electricity	HHs using gas, electricity and additional heating material
Gas	3,143	1,482
Electricity	717	682
Heating material	0	3,075
Total	3,860	5,239

Overall, **energy expenses in the HH consume a large portion of the reported HH monthly income:**

- On average, surveyed hosting HH reported an income averaging 5,871 MDL in the month preceding the survey. This means that on average, **38% of their monthly income is spent on energy expenses in the warmer season.**
- Considering that, as will be seen in a later section on livelihoods, the majority of surveyed HH rely on relatively sources of income not dependent on seasonal variations, it can be assumed that a household's income does not significantly vary with seasons. This means that **in winter months, more than 60% of the monthly income can be spent on energy expenses.**

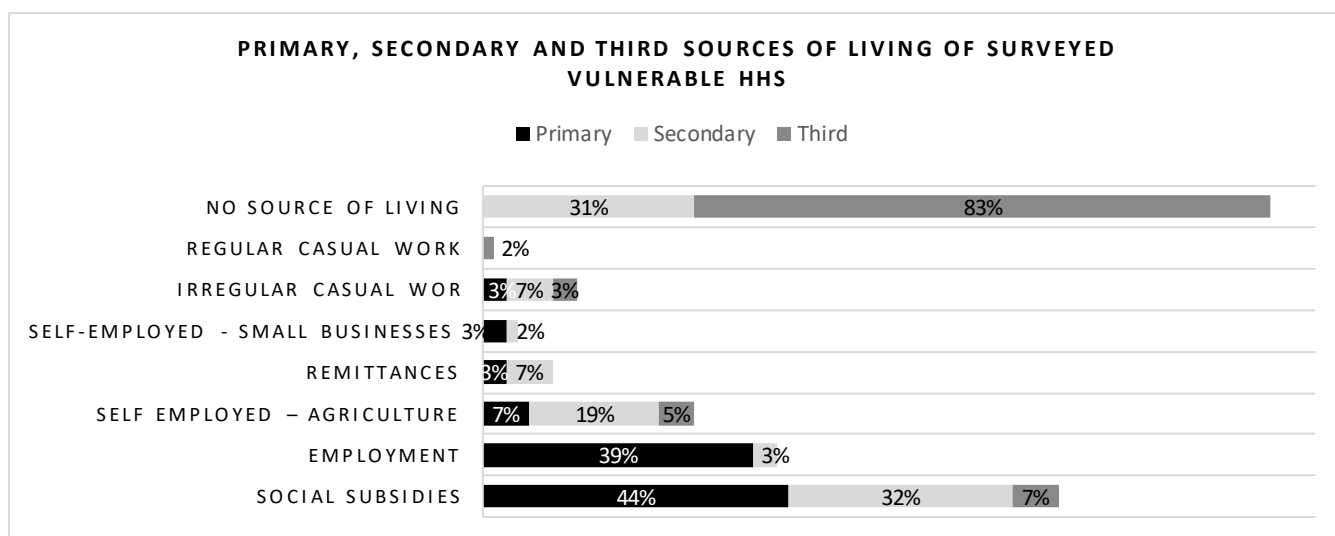
2. LIVELIHOODS AND FOOD SECURITY

Vulnerable households

Sources of living

The review of the sources of living of surveyed vulnerable HH does not offer a varied picture.

- **Unequivocally, social subsidies represent the main source of living** among surveyed HH, either as a primary (for 44% HH) or secondary (for 32% HH) source of living.
- **Employment is the second most important source of living**, essentially as a primary source (for 39% HH), either by the state or in private companies.
- **Agriculture represents only a complementary source of living** for 24% of the surveyed population, and the primary source of living for just about 7% of them (four HH, including one living in an urban setting). This can be linked to the decisions of former Moldovan government to chop up agricultural lands after the fall of the communist regime, which created an unsustainable and unproductive agricultural system in a country otherwise characterized by its rurality and availability of land.



Among the surveyed HH, about a third reported relying on a single source of living (18 HH) while over two thirds (41 HH) reported more than one source of living – 31 HH reported relying on two sources of living and 10 HH relying on three sources of living. The number of reported sources of living however appears to have only a slim link with the number of persons reported to be earning a living in the HH: 87% of surveyed HH report one (53%) or two (34%) working family members – only 5% (3 HH) reported more working family members, and 8% (5 HH) reported none.

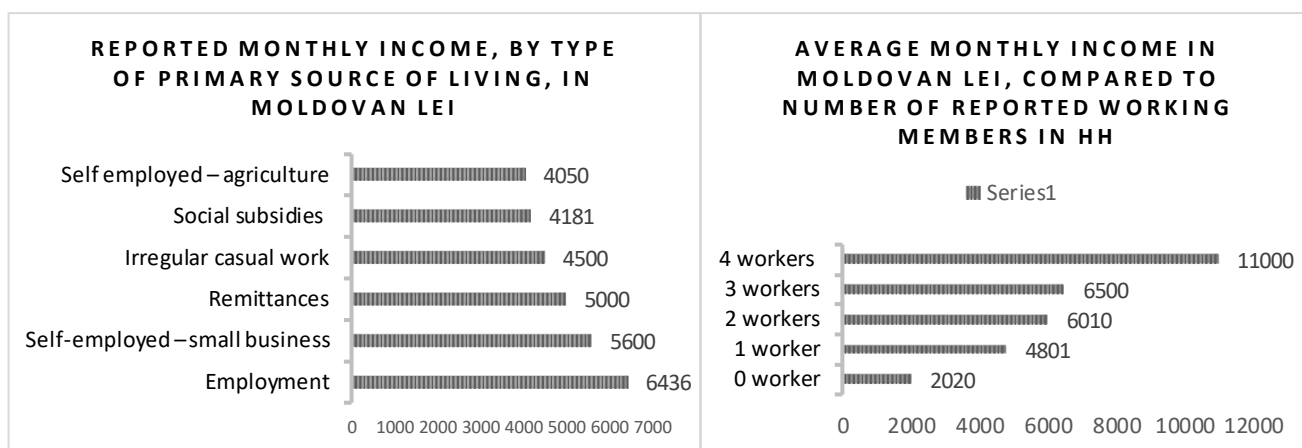
Table 6: Average number of working HH member per number of reported sources of living

Reported number of sources of living	Average number of working persons as reported by respondents
1	1.28
2	1.35
3	1.63

Income & Expenses

On average, surveyed HH reported earning **5,137 MDL** in the month preceding the survey. Findings underline that:

- **The average monthly income level seems linked to the type of primary source of living:** HH reporting agriculture as their primary source of living report an income significantly lower (by a third on average) than HH reporting employment or self-employment in private businesses as their primary source.
- **The more working members are reported in the HH, the higher the monthly income.**
- **For the majority income had either not changed (41%) or actually increased (44%) in the past 6 months prior to the survey.** For those who reported an increase, all indicated that the increase was due to an increase in pension level or them newly becoming a pension recipient. 2/3 reported social subsidies as their primary source of living. Only seven HH reported a decrease in income, due to falling wages, loss of work or loss of pension. However, there seems to be no correlation with their primary source of living.
- Only **5% reported having some savings** (three out of 59 HH), but **48% reported having debts** (28 out of 59 HH), and the majority (25 out of 28 HH) considered these debts as medium to high.



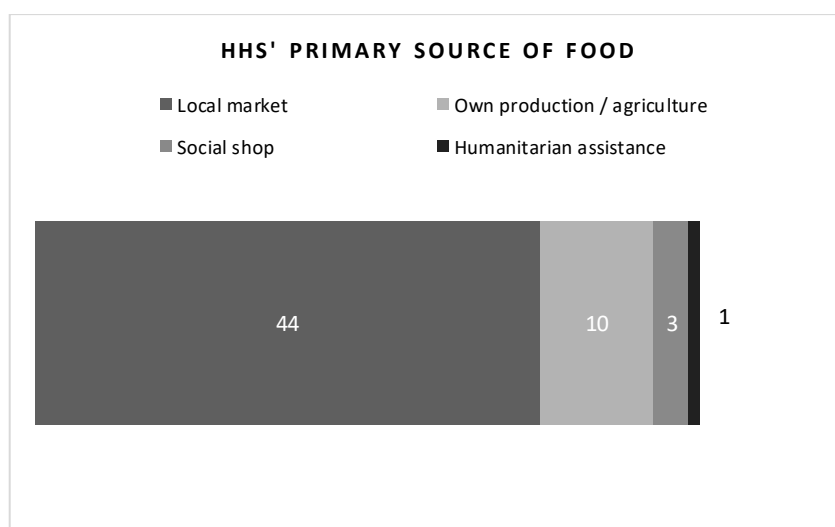
Compared to the average monthly income of 5,137 MDL surveyed HH reported basic expenses of on average **3,698 MDL per month** during warm months, with no significant changes in cold months at an average 3,965 MDL per month – excluding the cost of utilities described in section V.1. above. Food expenses represent the largest expense for all HH. Reimbursing debts also cuts down largely into the income. However, this expense only concerns about a third of surveyed HH.

Table 8: Overview of average HH monthly basic expenses

Expense category	Average expenses per warm month		Average expenses per winter month	
	% surveyed HHs responding	MDL/month/HH	% surveyed HHs responding	MDL/month/HH
Food	100%	MDL 2,156	100%	MDL 2,327
Health	90%	MDL 699	98%	MDL 750
Transportation	54%	MDL 232	58%	MDL 280
Debts reimbursement	29%	MDL 1,876	32%	MDL 1,760
Education	27%	MDL 381	29%	MDL 600

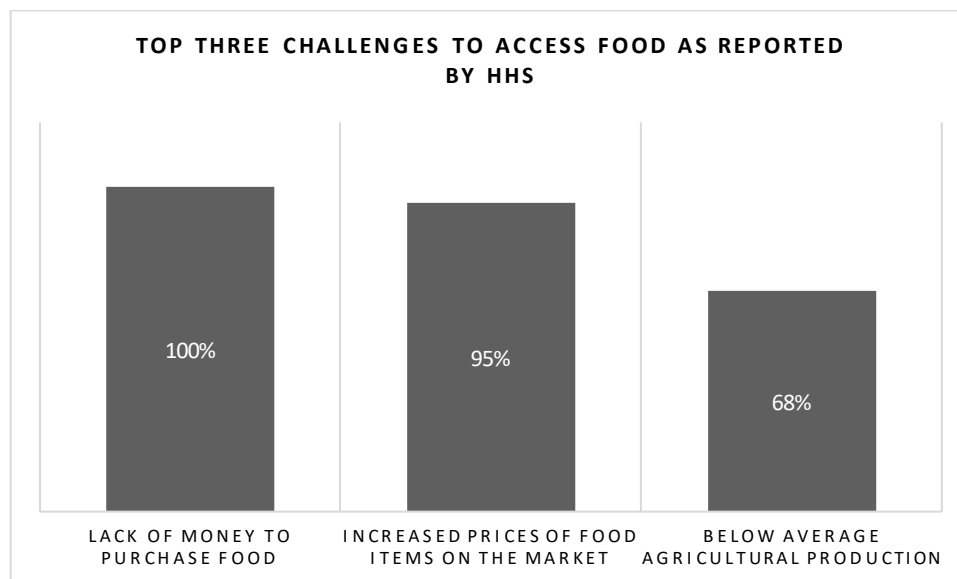
Access to food

The main source of food for vulnerable HH is purchase on the local market, practically none has received any external assistance.



The main challenges to access food lie essentially in the imbalance between prices of basic commodities and level of income. Yet a significant number of respondents (40 out of 59) also noted the **below average agricultural production** as a key issue. Even though only a minority among them (3 out of 40) reported relying on agriculture

as primary source of living, the below average production may have impacted availability of certain locally produced/supplied food commodities in local markets, affecting access to food on the markets which are the main source of food for the surveyed population.



Refugee households
Sources of living

Most (73%) of the surveyed refugee HH used to be employed in Ukraine. In Moldova **the vast majority (70%) rely on external assistance**: humanitarian assistance (41%) or the charity of neighbors or the community (29%).

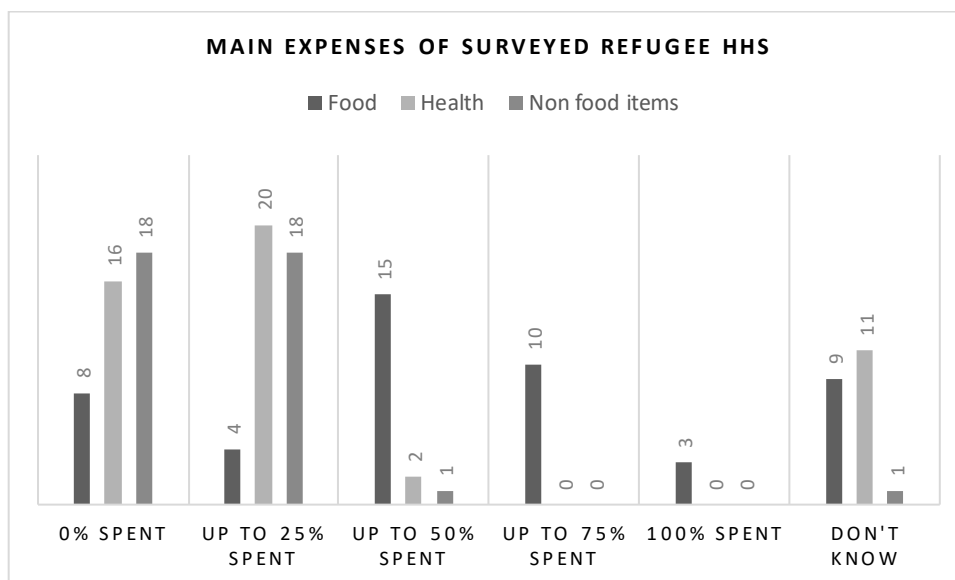


While only one HH reported savings as their main source of living in Moldova, a sizeable proportion reported having had to use their savings to complement other income sources and be able to cover their basic needs. Of the 49 surveyed HH, 43 reported arriving in Moldova with savings. Among them, **67% indicated having spent 75% or more of their savings** (84% reported having spent at least half of their savings).

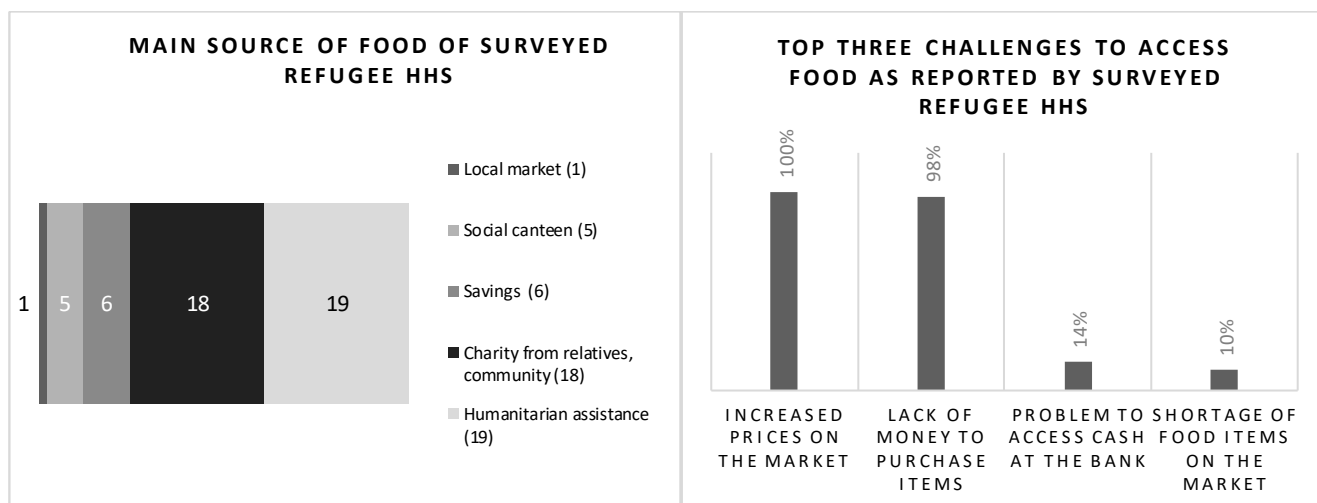
On the other hand, of the 49 HH 28.5% (**14 HH**) reported contracting debts since arriving in Moldova, considered as medium (70%) or high (30%). There is no link between existence of savings, and existence of debts: most of the HH who came with no savings also contracted no debts (only one out of 6 HH who reported no savings has contracted debts). A fraction of those who reported having spent all their savings reported contracting debts 5 out of 21 HH who reported spending 100% of their savings have contracted debts).

Expenses & Access to food

On average, the bulk of income or financial resource refugees obtain or own is spent on food expenses.



However, the vast majority of refugee HH rely on external assistance to cover their food needs (only one surveyed refugee HH reported the local market as their primary source of food). The main challenges for them to access food is related to their lack of financial resources and income.

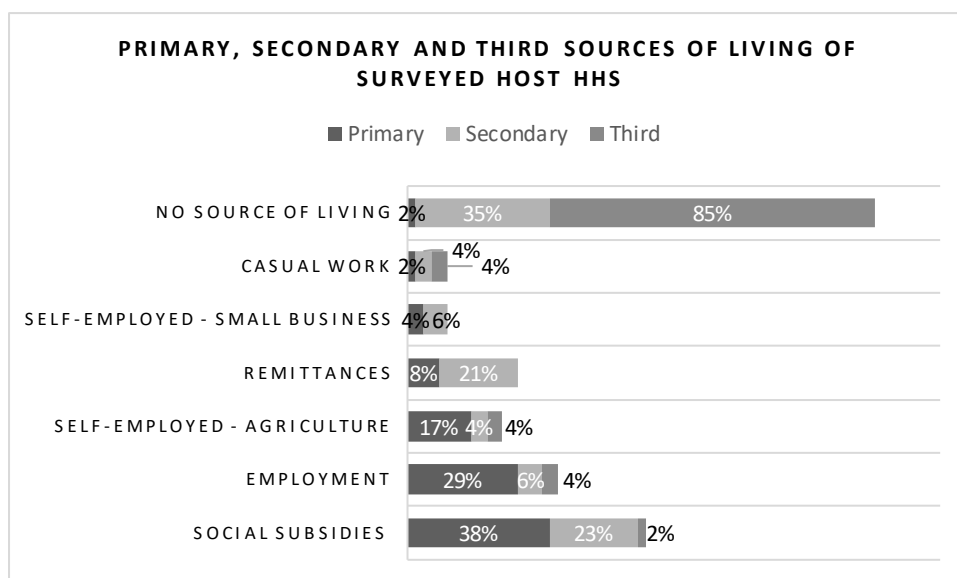


Refugee-hosting households

Sources of living

There are no significant differences in the livelihood status of hosting HH compared to vulnerable HH:

- **Hosting HH rely primarily on social subsidies** as a primary (for 38%) or secondary (23%) source of living
- **Employment represents the second most important source**, for 29% as a primary source and for 6% as a secondary source
- Hosting HH however seem to rely more on agriculture as a primary source (17%) compared to vulnerable households (7%)
- **Hosting HH rely more on remittances** than vulnerable HH, with 29% having reported remittances compared to just 10% of vulnerable households.



Among the surveyed HH, just over a third (35%) reported relying on a single source of living (17 HH) while just under two thirds (31 HH) reported more than one source of living – 24 HH reported relying on two sources of living and 7 relying on three sources of living. Of the surveyed HH, 89% report one (29%) or two (60%) working members in the HH – 6% (3 HH) report more working members, and 4% (2 HH) reported none. Compared to vulnerable HH, the number of reported sources of living appears to have a certain link with the number of persons reported to be earning a living in the HH, as can be seen in the table below:

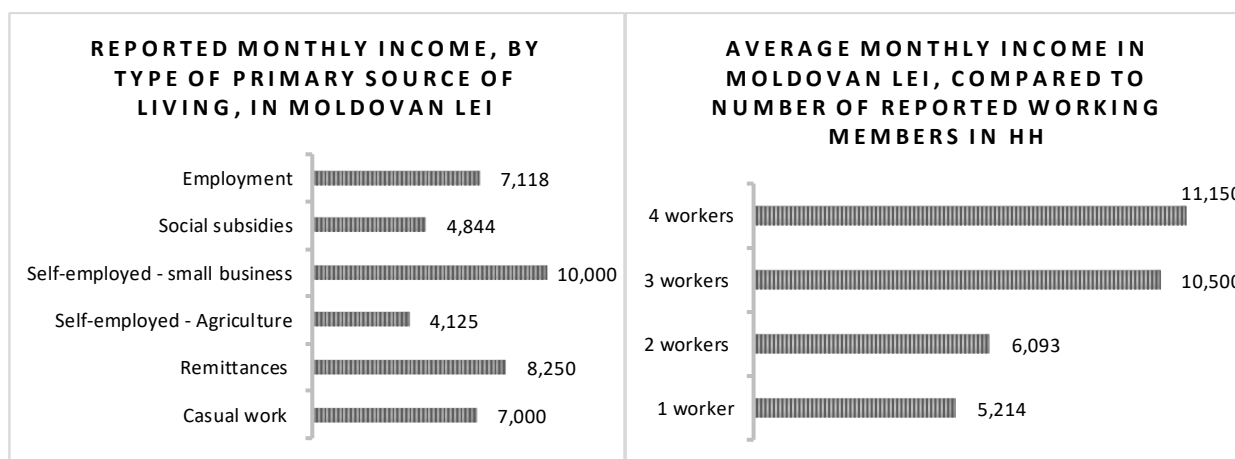
Table 9: Average number of working HH member per number of reported sources of living

Reported number of sources of living	Average number of working persons as reported by respondents
1	1.53
2	1.67
3	2.26

Income & Expenses

On average, surveyed HH reported earning **5,871 MDL** in the month preceding the survey, slightly but not significantly higher compared to vulnerable HH (5,137 MDL). Findings underline that:

- Similarly, as vulnerable HH, **the average monthly income level is linked to the type of primary source of living**: HH reporting agriculture as their primary source of living report an income significantly lower (by 60% on average) than HH reporting self-employment in private businesses as their primary source. Remittances represent the second highest primary income after businesses.
- **The more working members are reported in the HH, the higher the monthly income.**
- **For the majority, income had either not changed (50%) or actually increased (33%) in the last 6 months prior to the survey.** For those who reported an increase, the majority (13 HH) indicated that the increase was due to an increase in pension level or them newly becoming a pension recipient, while two HH mentioned receiving assistance and one HH reported the increase is due to increased work in the HH. Only four HH reported a decrease in income, due to loss of work or loss of pension - there seems to be no correlation with their primary source of living however.
- Only **8% reported having some savings** (four out of 48 HH), but **46% reported having debts** (22 out of 48 HH), and the majority (21 out of 22 HH) considered these debts as medium to high. Debts were contracted in majority for coping with the increased energy costs of the previous winter (19 out of 22 HH) or to cope with the additional expenses linked with hosting refugees (15 out of 22 HH).



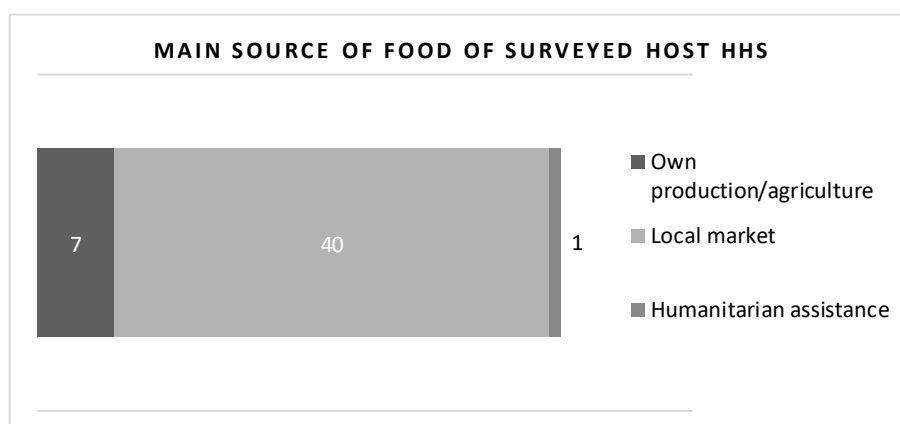
Compared to the average monthly income of 5,871 MDL, surveyed HH reported basic expenses of on average **5,167 MDL** monthly during warm months, with no significant changes during cold months at an average 5,270 MDL – excluding the cost of utilities described in section V.1. above. **Food expenses represent the largest expense** for all HH. Reimbursing debts also cuts down largely into the income especially in the winter, however this expense only concerns about a fourth of surveyed HH households.

Table 10: Overview of average HH monthly basic expenses

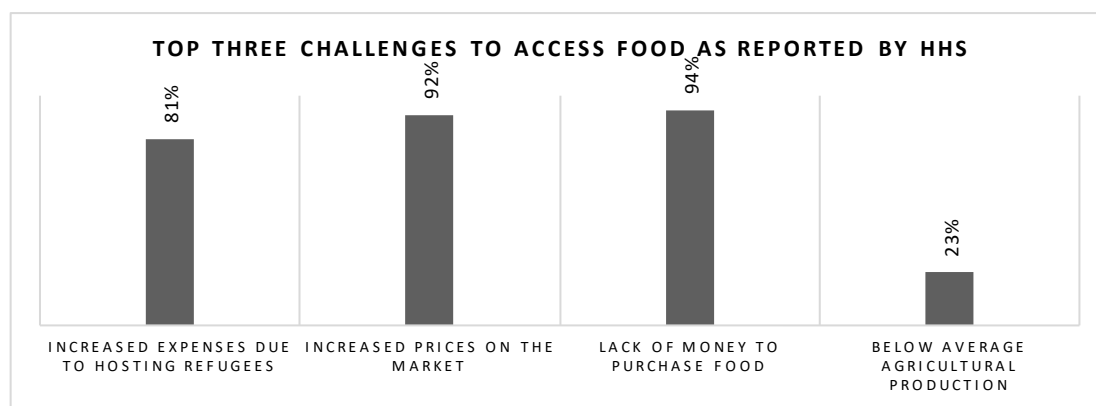
Expense category	Average expenses per warm month		Average expenses per winter month	
	% surveyed HHs responding	MDL/month/HH	% surveyed HHs responding	MDL/month/HH
Food	100%	MDL 3,273	100%	MDL 2,815
Health	94%	MDL 702	98%	MDL 764
Transportation	63%	MDL 773	63%	MDL 580
Debts reimbursement	27%	MDL 2,354	33%	MDL 3,941
Education	19%	MDL 283	17%	MDL 175

Access to food

For hosting HH also, local markets are the main source of food, only a fraction relies on agriculture production.



The main challenges they face in accessing food are again related to limited income/high prices of food items on the market, but also to the increased expenses linked to hosting additional persons in their HH.



3. EDUCATION

Vulnerable households

57% of the vulnerable HH surveyed (28) had school-aged children of which 2% listed education as their top priority, 0% as their second priority and 8% as their third priority. When asked about barriers to access education 29% reported no barriers and 29% did not respond.

The following challenges to accessing education were reported by the rest:

- 25% a lack of funds for education (11% lack of school supplies, 7% general education expenses, 7% for school clothes)
- 21% no computer for online learning
- 7% access to education for children with disabilities
- 4% (1 respondent) no time to purchase school clothes

The average expenditures of households with school aged children is 5% of the total expenditure at present, and is expected to remain the same in the winter.

Refugee Households

As outlined above 34% of the surveyed refugee population are children aged 5-17 (16% male and 18% female. Based on this assessment refugee HH do not prioritizing education (0% first priority, 2% second priority, 8% third priority) despite 41% of the surveyed HH (20) have school aged children. However, 90% of those children are reported to be following (online) education through the Ministry of Education of Ukraine.

The following needs were expressed:

- 40% need a computer
- 15% requested textbooks in Ukrainian
- 5% requested stationary.

When asked what barriers faced their children, 30% said a weak internet connection, 20% the availability of a computer for the online learning programme, 5% (1 respondent) mentioned a lack of textbooks.

Refugee-hosting Households

44% of the surveyed hosting households (21) have school-aged children. None of the HH listed education as their top or second priority. 2% listed education as their third priority. The following challenges to accessing education were identified by the HH:

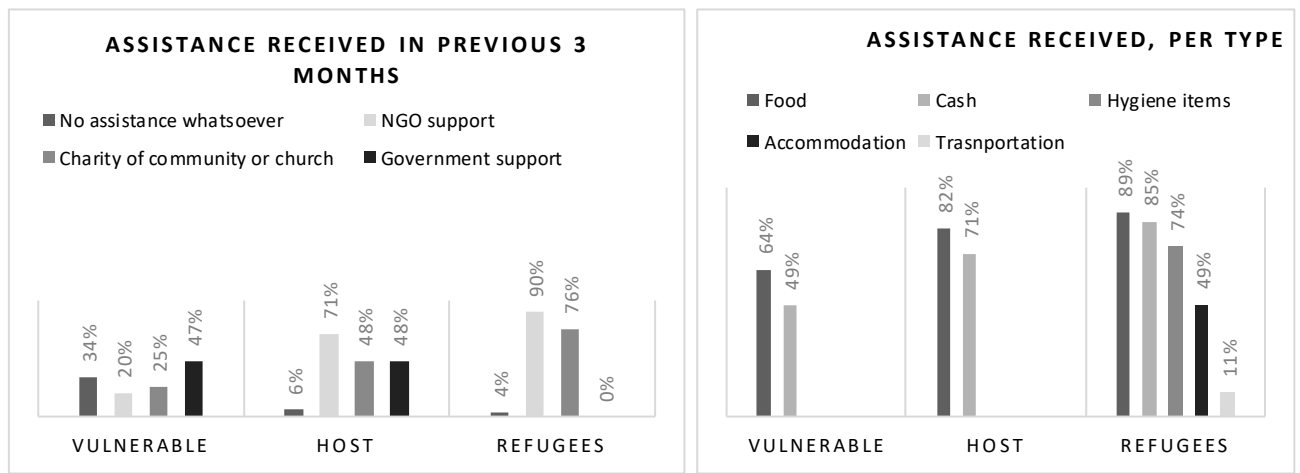
- 19% needed a PC for online learning
- 5% said school supplies
- 19% said there is no need

However, more than half of the HH, namely 57% did not respond to the respective question.

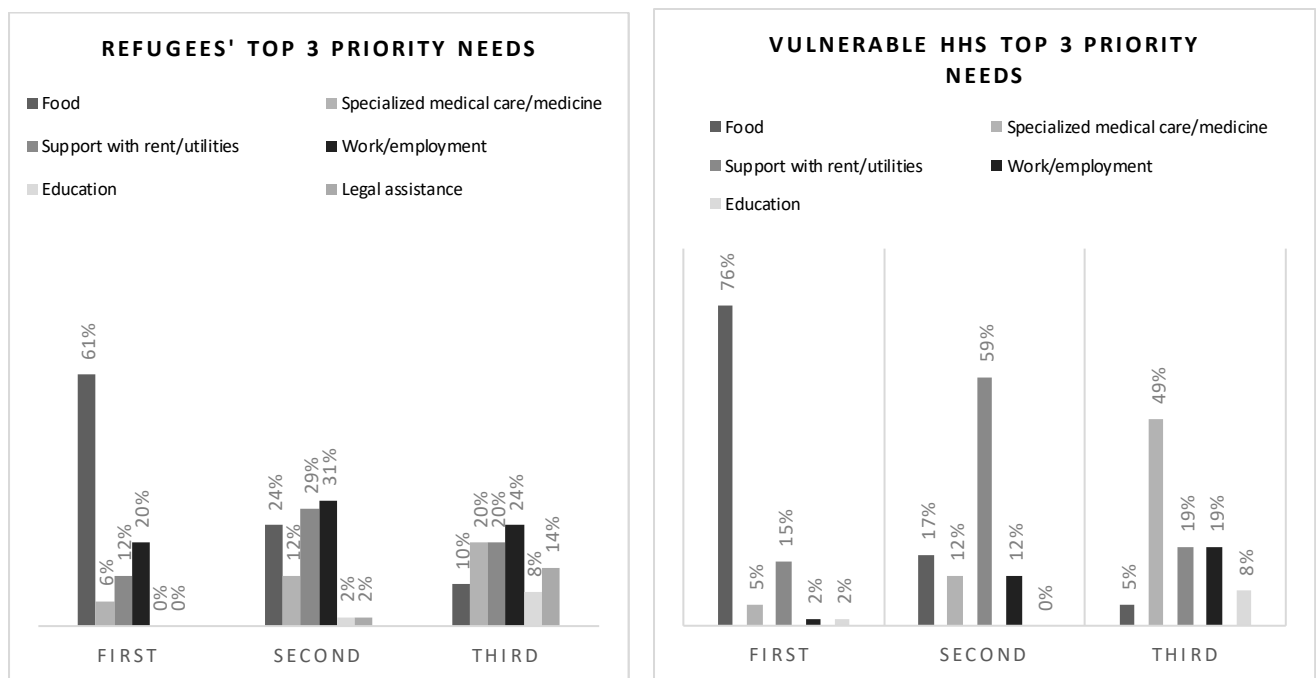
The average expenditure of HH with school aged children in education is 1% of the total expenditure at present, and is expected to decrease to 0.5% in the winter.

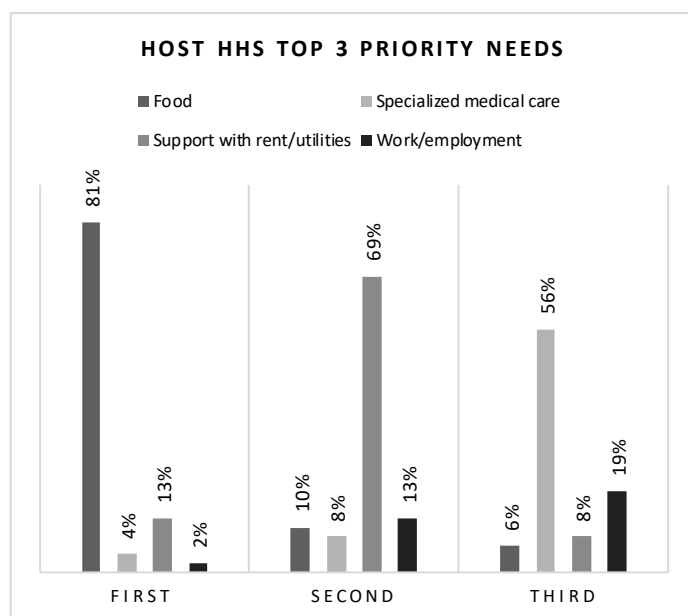
4. ASSISTANCE

The reports of the surveyed population indicate that **assistance has largely prioritized the war-affected populations** i.e. refugee-hosting HH and refugees themselves - leaving out otherwise vulnerable HH affected by other shocks including the socio-economic impact of the pandemic, the rise in energy prices in the winter 2021/2022, and the current and continuing inflation. Vulnerable HH appear to be left out of humanitarian assistance both by non-government organizations and by communities and churches, unlike refugees and host HH who have largely benefitted from local support systems in addition to I/NGO assistance. For those who received assistance (other than governmental support), it was mainly in the form of food or cash.



Priority needs for all surveyed households regardless of status are unequivocally food, health and livelihoods.





5. PROTECTION CONCERNS

Access to legal documentation: Of the 49 surveyed refugee HH, 11 reported that not everyone had their passport with them and had to cross the border with other IDs, in general birth or marriage certificate (in 4 cases individuals had no other ID with them).

VI. MARKET SURVEY

1. OVERALL MARKET CONTEXT IN SURVEYED AREAS

Overall, surveyed shop managers or owners reported that there was no change in the market size in the months preceding the survey. The only two cases where changes were reported are

- Besghioz, a remote rural locality where the number of shops was reported as decreasing,
- Ceadir-Lunga, an urban locality where the number of shops was reported as increasing due to growing demand.

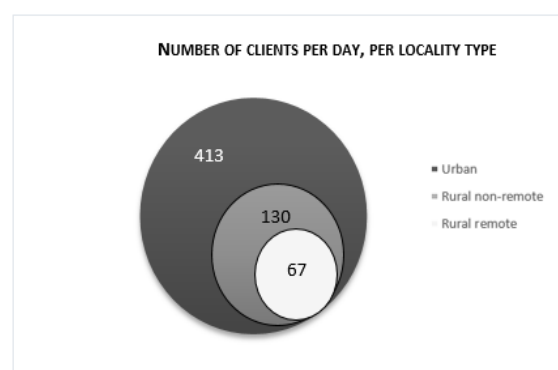
All basic food and non-food commodities are generally reported as fully or partially available in the markets surveyed—however, the imbalance between the prices of essential commodities and the level of income that caused by the increased demands, price inflation, and the decreasing agricultural production to below-average level hinders the vulnerable households from accessing and fulfilling their needs. The exception is Ceadir-Lunga where two out of three vendors surveyed reported that not all basic dairy products and hygiene products are available.

Refugees are served in all of the surveyed markets. As can be seen from the below table, the challenges they are reported to face on the markets are not significantly different from those faced by local customers, essentially around lack of money to purchase goods on the market – which goes in line with what surveyed households have indicated in section V, 2. Food Security & Livelihoods.

	Local customers		Refugee customers	
	Lack of money	Market too far	Lack of money	Market too far
Alexandru Ioan Cuza	!		!	
Basarabeasca				
Besghioz			!	
Bucuria	!		!	
Cahul				
Ceadir-Lunga	!		!	
Comrat	!			
Congaz	!			
Lebedenco			!	
Valea Perjei		!		!
Vulcanesti	!		!	

The surveyed localities are served by a variety of money transfer systems, with the main ones (as reported by vendors) indicated in the table below.

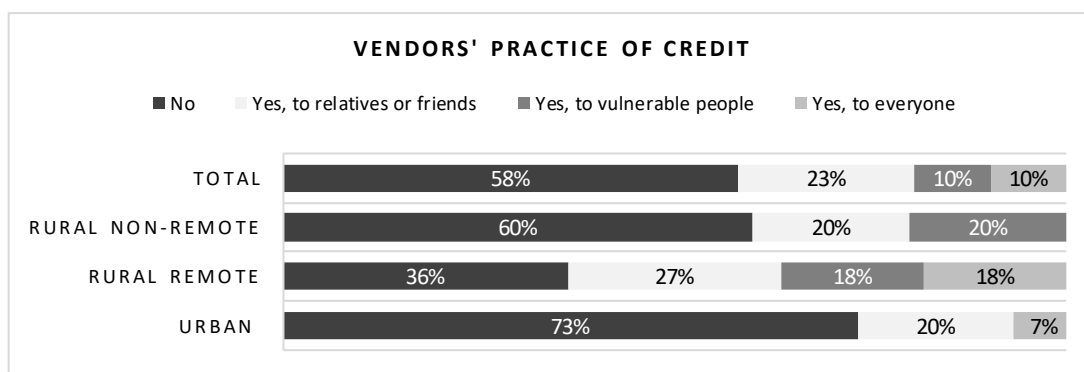
	Moldova Post	Western Union	Agroindbank	Moldindcombank	Victoria Bank	Fincombank	Energ Bank
Alexandru Ioan Cuza	✓						
Basarabeasca		✓	✓			✓	
Besghioz	✓						
Bucuria	✓						
Cahul			✓	✓	✓		
Ceadir-Lunga				✓	✓		
Comrat			✓	✓		✓	
Congaz				✓		✓	✓
Lebedenco	✓						
Valea Perjei	✓						
Vulcanesti	✓						



2. SHOP AND SALE PRACTICES

Typically, surveyed shops in remote areas are significantly smaller in size and capacity than shops in urban or non-remote areas. Regardless of the type of locality, 33% of urban vendors reported an increase of clients in the previous 6 months, but **the majority of vendors reported a decrease in number of clients in the 6 months preceding the survey** (61% of vendors overall). This can be understood in light of the reports of both vendors (Section VI.1 of this report) and surveyed households (section V. 2.) alike that one of the top challenges for people to access markets is lack of money to purchase commodities and increased prices on the market.

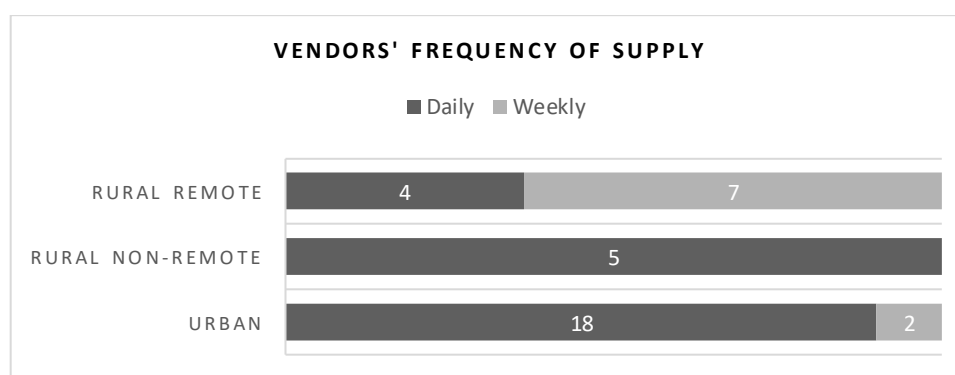
Whether a vendor sells on credit or not, and to whom, also varies with the type of locality – vendors in rural areas tend to be more willing to sell on credit than urban vendors, which is likely due to them being knowing their clients personally in comparison to larger, urban settings.



3. SUPPLY PRACTICES

The vast majority of vendors reported setting prices of goods they sell themselves, **based either on demand (42%) or availability of goods on the market (48%)**. Only three vendors reported setting prices based on the prices they themselves purchase commodities, and one vendor reported that prices are set by their head office in Chisinau. Consequently, **vendors change prices frequently**: daily for 61% of them, weekly for 36%.

The frequency with which vendors resupply their shops is very much linked to the remoteness of the localities they are located in: **urban vendors tend to resupply more frequently than rural remote vendors**.

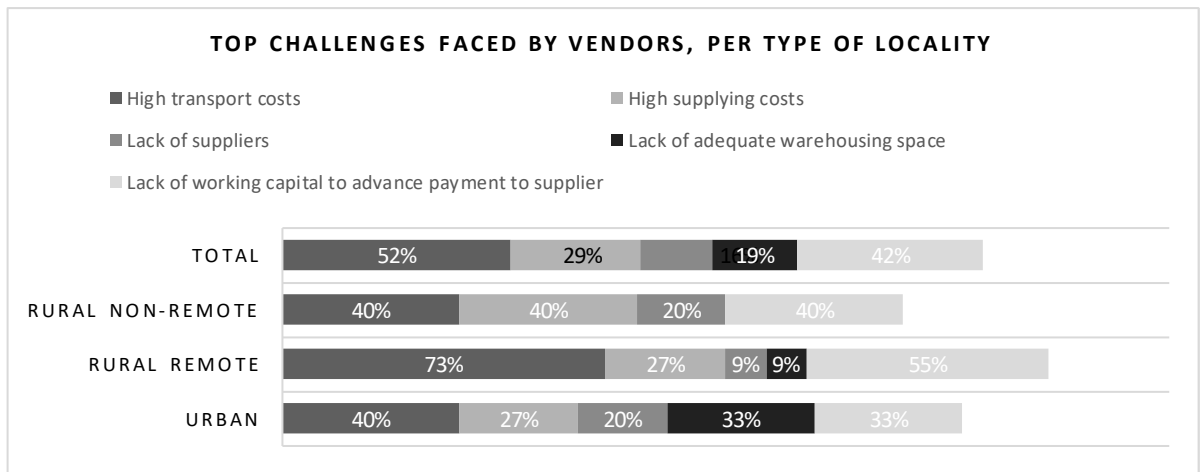


Similarly, the source of supply also varies with the type of localities considered. Yet regardless of the origin of the supply, all vendors reported that the supply arrives to their shop within 3 days of being ordered.

- **80% of urban vendors supply themselves primarily among national wholesalers**, and secondarily among local wholesalers – only one vendor reported importing fresh produce (meat and vegetables) from Romanian and Russian suppliers
- **63% of rural vendors in remote areas resupply themselves primarily among local wholesalers**, otherwise among national wholesalers – only one vendor reported using their personal production to resupply their shop
- Rural vendors in non-remote areas resupply equally among local and national wholesalers

Vendors face similar types of supply challenges, but at varying levels depending on the type of location they are set in:

- **High transport costs are a significant challenge for remote rural vendors** compared to urban and non-remote vendors: this is because they are located away from main access (paved) roads, and access for trucks is more challenging and lengthier and thus costs more
- **Advance payment to suppliers is also significantly more challenging for remote rural vendors**: this may be because they are typically smaller and thus have a reduced activity and lower turnover than their counterparts in urban or non-remote settings,
- **Urban vendors struggle more with warehousing** compared to rural vendors.



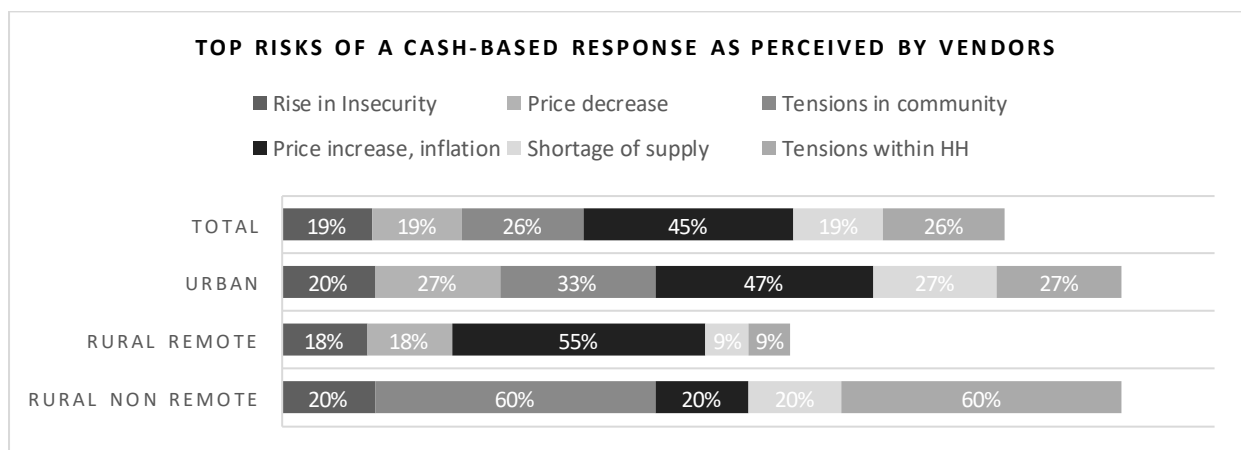
Regardless of these challenges and of the type of localities they are set in, **almost all vendors indicated they would be able to increase their supply within 1-2 days if demand increased** (28 out of 31 vendors) or at the minimum within 1 week (remaining three vendors). However, **55% of all vendors would not be able to increase their supply without down payment.**

4. PERCEIVED RISKS OF FINANCIAL ASSISTANCE IN AREA

Out of all surveyed vendors, **seven (23%) vendors indicated that they do not think financial assistance in the form of cash or vouchers would create any risk or negative impact in the area** – they are split evenly between urban, rural and remote vendors.

For the remaining 24 vendors, the main risk of financial assistance would unequivocally be an increase in prices, followed by tensions in the community or within the household. However, this perception differs depending on the type of vendor, as can be seen in the chart below.

- **Price increases are most expected by remote and urban vendors:** this can be explained by the fact that the majority of vendors reported setting prices based on demand or availability (see Section VI.3). For remote vendors in addition, this may also be explained by the fact that they face little to no competition where they operate.
- **Tensions between people are particularly feared by rural non-remote vendors**



5. CONCLUSIONS AND RECOMMENDATIONS

The recent eruption of the war in Ukraine and consequent influx of refugees in Moldova has accentuated a context that was already profoundly weakened by a deeply anchored poverty, the impact of the pandemic and the rapid rise in the price of basic commodities. The rapid assessment underlines that the majority of the local population in the surveyed region relies on government subsidies as a primary source of living and struggles to cope with the rapidly increasing cost of living. At the same time, data suggests that assistance so far has primarily targeted war-affected populations only, leaving otherwise vulnerable populations struggling to make ends meet. In order to ensure humanitarian needs are met regardless of the type of crisis that provoked them, **humanitarian actors ought to respond considering vulnerability rather than status** of the people they serve. It is also essential to revise the methodologies adopted, especially for financial assistance, to ensure that assistance reflects needs.

SHELTER / ACCOMMODATION

- **Review the methodology of the humanitarian financial assistance** to ensure the assistance meets real needs and has a positive impact on the target population. In particular, a) review the amount provided monthly to better reflect the real needs of the people, and b) provide regular monthly assistance to create a sense of stability.
- **Provide financial assistance to vulnerable HH** in addition to hosting and refugee HH, to cover utilities and rent – especially during cold winter months into 2023 -, linking the assistance to existing social protection systems.
- **Identify opportunities for alternative accommodation for refugees** to relieve hosting HH, and support refugee HH in finding a source of living enabling them to cover shelter-related expenses i.e. rent or utilities.
- **Immediately start repositioning resources for the winterization assistance** – especially financial resources for covering utilities; and/or
- **Assess the option of in-kind provision** of heating material (wood, briquettes, coal) – either via stockpiling or by establishing framework contracts with extra-reliable suppliers, considering the reduced importing opportunities (i.e. no more imports from Russia and to a certain extent, Ukraine as well).

FOOD SECURITY & LIVELIHOODS

- **Review the methodology of the humanitarian financial assistance** to ensure the assistance meets real needs (see Shelter/Accommodation).
- **Provide financial support to all population in need including host, refugee and vulnerable HH**, to enable them to meet their essential needs including food, health, hygiene and education, and reduce debt levels. Where possible, link the assistance with existing social protection systems.
- **Conduct regular market monitoring** to reflect timely the changes brought by the inflation on financial assistance.
- **Support the revival and diversification of income-generating activities among local populations while integrating refugees**, including by encouraging the development of agricultural income-generating activities.
- **Improve access to markets** by rehabilitating/planning of roads to improve access to remote, isolated localities.
- Support the market to maintain reasonable availability of commodities and prices.

EDUCATION

- **Understand the reasoning behind continued online education** via the Ukrainian Ministry of Education for refugee children as opposed to integration in Moldovan schools.
- **Support online learning** for refugee children who are attending classes through the Ukrainian Ministry of Education.
- **Mitigate the financial barriers to education** for refugee and vulnerable Moldovan HHs including the provision of laptops/PCs, school supplies, school uniforms, etc.

PROTECTION

- **Legal support to refugees** to ensure they have access to documentation



peopleinneed.cz