

**NATIONAL REPORT ON HOUSING FOR UKRAINIAN REFUGEES:
MARKET ANALYSIS AND GOOD PRACTICES**

**Romania
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SMART UA

**Scaling the successful social inclusion and integration of
Ukrainian refugees in Hungary, Romania and Slovakia through
an innovative multi-stakeholder cooperation**



SMART UA

Authors

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PART I – HOUSING MARKET ANALYSIS

1. Introduction

This national report is part of WP2 – Housing Market Analysis and Identification of Good Practices within the project *Scaling the successful social inclusion and integration of Ukrainian refugees in Hungary, Romania and Slovakia through an innovative multi-stakeholder cooperation* (Acronym SMART UA)

(Project number: ESF-SI-2024-UA-01-0074) and is designed as part of a three-country analysis (Romania, Hungary, and Slovakia), under Work Package 2, following a common methodology and a standardized format.

The objective is to analyze how the housing market in Romania responds to the needs of Ukrainian refugees, as well as to identify effective and replicable practices supporting access to housing. The report is based on a mixed-methods approach, combining quantitative and qualitative data, and aims to provide a structured overview of housing demand and supply, access barriers, existing support mechanisms, and the relevant policy framework.

Starting in February 2022, Romania became both a transit country and a country of temporary or long-term stay for a significant number of people displaced from Ukraine. This development has placed additional pressure on the housing market, particularly in large urban areas, where the availability of affordable housing was already limited. In this context, understanding housing market dynamics and existing support mechanisms is essential for informing sustainable and inclusive interventions.

The report seeks to address the following research questions: what are the main barriers faced by Ukrainian refugees in accessing and maintaining adequate housing; how do public, private, and civil society actors respond to these challenges; and which support models can be considered good practices with potential for replication.

The analysis is situated in the context of the activation of Directive 2001/55/EC on temporary protection, which granted beneficiaries from Ukraine the right of residence and access to housing in European Union Member States. However, during the period 2023–2025, most EU Member States, including Romania, limited the scope and duration of public housing support, shifting pressure toward the private market.

In this report, the term “Ukrainian refugees” is used in a broad analytical sense. When discussing rights, policies, and support mechanisms, the legal term “beneficiaries of temporary protection” is used, in line with EU legislation and the applicable national framework in Romania.

1.1 Methodology and data sources

The methodology includes a desk review of the legislative framework and relevant initiatives in the housing sector, the administration of a questionnaire addressed to Ukrainian refugees, and the organization of a focus group with institutional actors involved in supporting access to housing.

Questionnaire (quantitative component)

The questionnaire was administered by JRS Romania between 26 and 30 September 2025 to a total of 44 Ukrainian refugees residing in Romania. The research instrument was translated into and administered in Ukrainian to ensure better understanding of the questions and more inclusive participation. The questionnaire collected information on respondents' socio-demographic profile, their current housing situation, difficulties encountered in accessing and maintaining housing, types of support received, and perceived current needs.

Focus group (qualitative component)

The qualitative component of the research included a focus group organized on 26 September 2025 at the premises of JRS Romania, with six participants representing key institutions and organizations involved in the housing of Ukrainian refugees. The focus group included two representatives of UNHCR, two representatives of the General Directorate of Social Assistance of the Municipality of Bucharest, one representative of Caritas Association, and one representative of JRS Romania. The discussion was moderated by a representative of JRS Romania, with co-moderation provided by an expert from the Association of Schools of Social Work in Romania.

The focus group aimed to explore institutional perspectives on systemic barriers, inter-institutional coordination mechanisms, the roles of different actors in supporting access to housing, and solutions considered effective or promising, in line with the WP2 guide.

Data analysis

Data analysis was carried out by integrating quantitative findings from the questionnaire with recurring themes identified in the focus group, with the aim of triangulating information and providing a housing market-oriented interpretation. The collected data are exploratory in nature and are not nationally

representative; however, they offer relevant insights into refugees' experiences and the ways in which existing systems respond to their needs.

The report is structured in two main parts. The first part is dedicated to housing market analysis and includes an analysis of demand and supply, identification of access barriers, presentation of existing support schemes, a SWOT analysis, and a review of the policy and regulatory framework. The second part is dedicated to documenting good practices, based on three interviews conducted with relevant actors, and aims to highlight intervention models that may contribute to the development of more sustainable and inclusive housing solutions for Ukrainian refugees in Romania.

In accordance with the WP2 framework, the analysis focuses on understanding housing market dynamics and functional support mechanisms, rather than evaluating impact or formulating quantitative projections.

1.2 Ethical considerations

The research was conducted in accordance with the ethical principles of the SMART UA project, with the objective of protecting the rights, safety, and dignity of all participants involved in the data collection process.

Participation in the research activities was voluntary, and informed consent was obtained from all participants prior to their involvement in the questionnaire, focus group, or interviews. Participants were clearly informed about the purpose of the research, the type of activity, the estimated duration, the nature of the questions, and the use of the collected data. Consent was expressed in written or verbal form, depending on the context and type of activity carried out.

The research did not involve the provision of services, goods, or financial support to participants. The sole purpose of the activities was to collect information that could contribute to improving housing-related policies and support programs for Ukrainian refugees.

Confidentiality and the protection of personal data were ensured throughout the research process. Collected data were anonymized, and any information that could lead to the direct or indirect identification of participants was removed during the analysis and reporting stages. Access to data was limited to members of the research team, and data storage was carried out securely, in compliance with applicable data protection legislation (GDPR).

Data collection involving refugees was carried out with heightened attention to the specific vulnerabilities of this group. Research instruments were linguistically adapted, including through the translation and administration of the questionnaire in Ukrainian, to facilitate understanding and informed participation. Participants were given the option to skip questions or withdraw from participation at any time, without any consequences.

In the case of the focus group and interviews, participants were informed in advance about the recording of discussions and the exclusive use of recordings for research purposes. Activities were facilitated in a safe, respectful environment, sensitive to gender and cultural context, to encourage the free expression of views.

By adhering to these principles, the research ensures a balance between the need to obtain relevant data for housing market analysis and the ethical obligation to protect participants, particularly refugees, throughout the entire research process.

1.3 Respondent profile

The description below is based on 44 questionnaires completed by Ukrainian refugees residing in Romania. The questionnaire was administered in Ukrainian, and all analyzed data derive from respondents' self-reporting.

The age structure indicates a predominant participation of working-age adults. The distribution of respondents by age group is as follows:

- 35–44 years: 17 respondents (38.6%)
- 45–54 years: 10 respondents (22.7%)
- 65 years and over: 8 respondents (18.2%)
- 55–64 years: 7 respondents (15.9%)
- 25–34 years: 2 respondents (4.5%)

No responses were recorded from the 18–24 age group. The data thus indicate a concentration of respondents in middle-aged and older age segments.

From a gender perspective, the sample is predominantly composed of women:

- 39 respondents are women (88.6%)
- 5 respondents are men (11.4%)

No responses were recorded for the options “other” or “prefer not to answer.”

With regard to length of stay in Romania, most respondents report a prolonged presence in the country:

- more than 3 years (arrived after 24 February 2022): 26 respondents (59.1%)
- 2–3 years: 12 respondents (27.3%)
- 6–12 months: 3 respondents (6.8%)
- 1–2 years: 2 respondents (4.5%)
- less than 3 months: 1 respondent (2.3%)

Thus, 38 out of 44 respondents (86.4%) have been in Romania for at least two years, indicating a population predominantly in a stabilized phase of stay.

Table 1. Respondent profile (summary)

Characteristic	Categories	N	%
Gender	Women	39	88,6
	Men	5	11,4
Age group	35–44	17	38,6
	45–54	10	22,7
	65+	8	18,2
	55–64	7	15,9
	25–34	2	4,5
Length of stay	≥2 ani	38	86,4

The family situation of respondents reflects a diversity of configurations:

- married, with partner present in Romania: 23 respondents (52.3%)
- divorced / separated: 8 respondents (18.2%)
- married, with partner absent from Romania: 7 respondents (15.9%)
- widowed: 5 respondents (11.4%)
- single (never married): 1 respondent (2.3%)

The data reflect varied family realities, characteristic of the context of forced migration and family separation.

Household size varies considerably:

- 3 persons: 13 respondents (29.5%)
- 2 persons: 11 respondents (25.0%)
- 4 persons: 10 respondents (22.7%)
- 1 person: 6 respondents (13.6%)
- 6 persons: 3 respondents (6.8%)
- 5 persons: 1 respondent (2.3%)

Overall, 38 respondents (86.4%) live in households composed of two or more persons. In multi-member households, co-residence with children is frequently reported, with respondents indicating children in different age groups, from young children to adolescents.

With regard to health status, responses indicate the following distribution:

- 22 respondents report having health problems that limit daily activities (50.0%)
- 20 respondents report no such problems (45.5%)
- 2 respondents chose the option “prefer not to answer” (4.5%)

Among those reporting health problems, both physical difficulties and mental health issues are mentioned. In addition, some respondents living in multi-member households report providing daily support to other household members with health problems.

Education

level

The education level of respondents is predominantly medium and higher. The most frequently reported levels are upper secondary education and higher education (bachelor’s and master’s degrees). A smaller number of respondents report lower levels of education or doctoral studies.

The distribution of respondents by highest completed education level is as follows:

- ISCED 7 – master’s degree (MA or equivalent): 19 respondents (43.2%)
- ISCED 3 – upper secondary education (general or vocational high school): 8 respondents (18.2%)
- ISCED 5–6 – bachelor’s degree (BA or equivalent): 8 respondents (18.2%)
- ISCED 4 – post-secondary non-tertiary education: 5 respondents (11.4%)
- ISCED 8 – doctoral studies (PhD or equivalent): 4 respondents (9.1%)

No responses were recorded for ISCED levels 0–2 (primary or lower secondary education).

Labour market status

With regard to labour market status, respondents are in diverse situations. Some report being employed or self-employed, while others are unemployed and seeking work, on maternity leave, retired, or students. Self-assessed financial situations range from significant difficulties in covering monthly expenses to households reporting that they are managing relatively well, without major financial problems.

The distribution of respondents by current labour market status is as follows:

- unemployed, seeking a job: 10 respondents (22.7%)
- other inactive status: 9 respondents (20.5%)
- retired: 9 respondents (20.5%)
- employed / entrepreneurs: 8 respondents (18.2%)
- on maternity leave: 6 respondents (13.6%)
- employed full-time: 1 respondent (2.3%)
- students: 1 respondent (2.3%)

Overall, the respondent profile reflects the experiences of Ukrainian refugees who have been in Romania for a relatively long period, predominantly women of working age, with medium and high levels of education, facing diverse family and economic situations. These characteristics provide relevant context for interpreting the findings regarding access to housing, encountered barriers, and support needs identified in the following chapters.

This socio-demographic profile provides the necessary framework for interpreting the results related to housing demand, access barriers, and support needs analyzed in the following chapters.

2. Housing demand analysis

2.1 Pressures related to availability and financial affordability

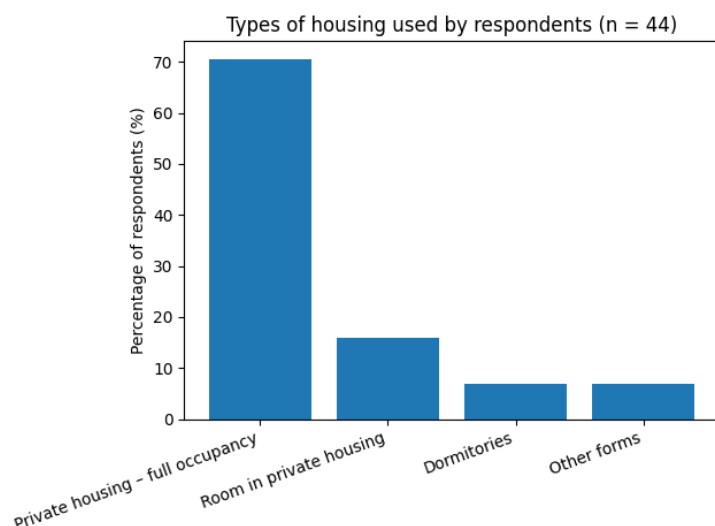
Data from the questionnaire indicate a housing demand almost exclusively concentrated on the private market, generating pressures both on housing availability and on financial affordability.

Out of the total 44 respondents, 38 persons (86.4%) live in private housing (apartments or houses), either occupying the entire dwelling (31 respondents – 70.5%) or living in a room within a private dwelling (7 respondents – 15.9%). Only 6 respondents (13.6%) use alternative forms of housing, such as dormitories or other collective solutions. This distribution reflects limited availability of non-private solutions and a high dependence on the private housing stock.

Table 2. Types of housing used

Type of housing	N	%
Private apartment/house – full occupancy	31	70,5
Room in a private dwelling	7	15,9
Dormitories (workers/students)	3	6,8
Other forms	3	6,8

Figure 1. Types of housing used by respondents (n = 44)



Note: Distribution of housing types reported by respondents at the time of data collection.

Pressures related to financial affordability are highlighted by the high level of respondents' own contribution to housing costs. A total of 34 respondents (77.3%) report that they fully cover accommodation costs, while an additional 4 respondents (9.1%) cover them partially. Overall, 38 respondents (86.4%) directly bear housing-related costs. Only 5 respondents (11.4%) report that they do not pay for accommodation, and 1 respondent (2.3%) is in a specific contractual situation.

These data indicate a housing demand that is strongly conditioned by households' own financial resources, with a relatively limited role played by support mechanisms aimed at reducing cost pressures.

Focus group participants confirmed that financial pressure remains central, both due to rent levels and the instability of resources/income among vulnerable individuals, which directly affects access to and retention of housing.

The issue of seasonal variability in rents in certain localities (e.g. Constanța) was also explicitly mentioned, reducing cost predictability and potentially generating eviction risks.

2.2 Sectoral and territorial disparities (national level)

The analysis of housing demand indicates the existence of sectoral disparities, reflected in differences between the types of housing accessed. Demand is clearly concentrated in the private rental sector, while public, social, or institutional housing accounts for a very small share among respondents.

With regard to territorial disparities, questionnaire data include information on respondents' place of residence (Q3); however, the small and non-representative sample does not allow for a robust comparative analysis across different areas of the country. Nevertheless, the concentration of demand in urban settings, particularly in large cities, is suggested by the reported housing types (private apartments, rooms in private dwellings), which are characteristic of urban rental markets.

As a result, the analyzed demand mainly reflects pressures specific to local urban markets, where competition for affordable housing is higher and alternative housing options are limited.

During the focus group, examples emerged of local differences in practices and administrative requirements related to access to social benefits (depending on county/city), which may amplify territorial disparities beyond housing market dynamics alone.

Although the data do not allow for a robust territorial comparative analysis, the reported housing types suggest that the pressures analyzed are primarily characteristic of urban rental markets.

2.3 Anticipated trends based on available data

Although the collected data do not include a longitudinal component, certain trends can be inferred from current demand characteristics, without formulating speculative projections.

First, the length of respondents' stay in Romania indicates a relatively stabilized housing demand. A total of 38 out of 44 respondents (86.4%) have been in Romania for at least two years, suggesting a transition from temporary solutions toward medium- or long-term housing arrangements, predominantly on the private market.

Second, the high level of direct payment of accommodation costs indicates a trend toward self-sustained demand, but also increased vulnerability to fluctuations in rental costs and income instability. In the absence of predictable support mechanisms, this trend may amplify risks of housing insecurity.

Overall, the data suggest that housing demand among Ukrainian refugees in Romania is oriented toward private, longer-term solutions, but remains exposed to financial pressures and structural limitations of the market, which are further detailed in the chapter on access barriers.

Within the focus group, institutional actors emphasized the need for more stable long-term solutions and for reducing the “discontinuity” of support measures as a key element for integration and medium-term planning.

3. Housing supply analysis

3.1 Profile of the available housing stock

The analysis of housing supply is based on the types of dwellings in which respondents report currently living, offering insight into the housing stock that is effectively available and accessible to Ukrainian refugees within the analyzed sample.

The data indicate that the housing supply used by respondents is dominated by the private housing stock, particularly rented apartments and houses. Out of the 44 respondents:

- 31 persons (70.5%) live in a private apartment or house occupied in full;
- 7 persons (15.9%) live in a room within a private apartment or house.

In total, 38 respondents (86.4%) use housing in private spaces, indicating that the housing stock available to this group is predominantly composed of private properties made available on the rental market or through similar arrangements.

A small number of respondents access other types of housing:

- 2 respondents (4.5%) live in workers’ dormitories;
- 1 respondent (2.3%) lives in a student dormitory;
- 3 respondents (6.8%) reported other forms of housing on an individual basis.

These data suggest a limited supply of collective, public, or semi-public housing solutions compared to private housing options.

The analysis reflects the housing stock effectively accessed by respondents, rather than the total existing stock, thus highlighting the gap between theoretical availability and practical accessibility.

3.2 Types of housing solutions: temporary housing, rental housing, NGO-provided housing, and private arrangements

Temporary housing is weakly represented among respondents at the time of data collection. The low proportion of individuals living in dormitories or other collective forms suggests that these solutions are used mainly as transitional measures rather than as medium- or long-term housing options.

Housing rented on the private market represents the main form of housing reported. Both full occupancy of a private dwelling and renting a room in a private dwelling indicate a supply concentrated in the private segment of the market, with differentiated access depending on households' available resources.

With regard to housing provided or facilitated by non-governmental organizations, questionnaire data do not allow for direct identification of their share within the housing stock. However, the reported housing types suggest that the role of this segment is quantitatively limited and does not constitute a major component of the supply used by respondents.

Private and informal arrangements, such as living in a room within a private dwelling or other individually reported solutions, account for 15.9% of housing situations (7 respondents). These arrangements indicate the existence of flexible but potentially less stable solutions that complement the formal private rental supply.

Overall, the analysis of supply based on questionnaire data shows that the housing stock available to Ukrainian refugees in the sample is dominated by the private rental market, with a low share of temporary, collective, or institutional solutions. The supply is fragmented and dependent on private landlords' availability and individual arrangements, factors that directly influence housing access and stability, as analyzed in the following chapter on access barriers.

Role of institutions

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The focus group shows that “accessible supply” for refugees is conditioned not only by the housing stock itself, but also by landlords’ willingness and the level of formalization of rental arrangements. The following were mentioned:

- landlords’ reluctance to rent to Ukrainians;
- differentiated price increases (“+100–200 euros” when landlords learn that the tenant is Ukrainian);
- eviction risks in the context of informal agreements and the lack of registered contracts.

UNHCR also described activities related to assessing emergency accommodation capacity (site assessments) in collaboration with the Department for Emergency Situations (DSU), in order to identify available temporary solutions at national level for high-risk cases or new arrivals.

4. Barriers to access to housing

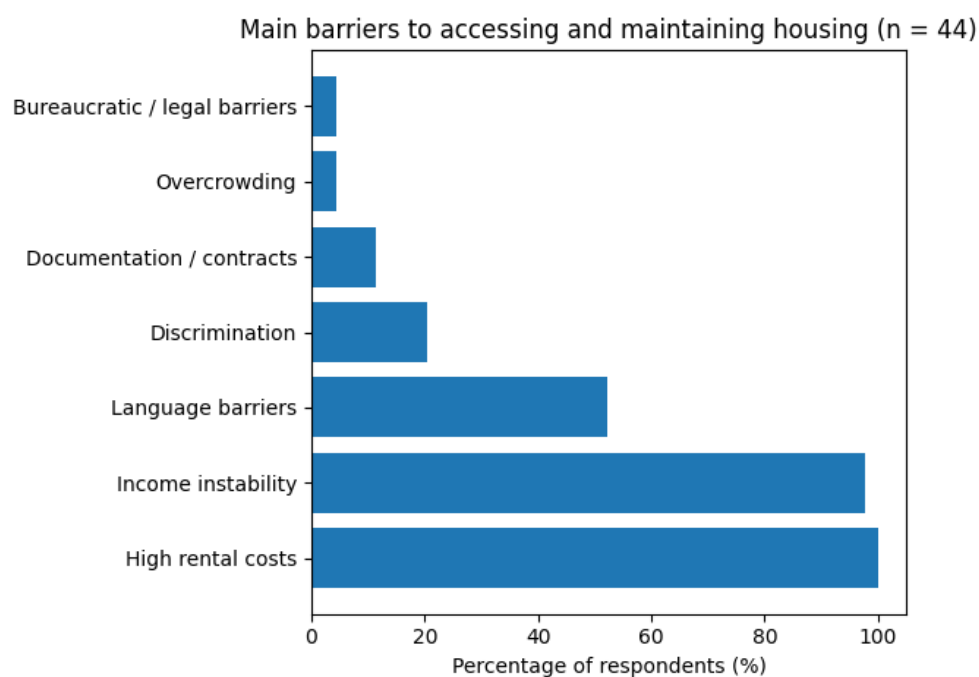
The analysis of access barriers is based on difficulties reported by respondents both in finding housing (Q14) and in maintaining housing (Q15). Respondents were able to select three barriers, in order of importance, for each of the two situations.

Table 3. Main barriers in accessing and maintaining housing

Barrier	N	%
High rental costs	44	100
Lack / instability of income	43	97,7
Language barriers	23	52,3
Discrimination	9	20,5

Barrier	N	%
Documentation / contract issues	5	11,4
Overcrowding	2	4,5
Bureaucratic / legal barriers	2	4,5

Figure 2. Main barriers to accessing and maintaining housing (n = 44)



Note: Percentage of respondents who mentioned each barrier at least once in questions Q14 and Q15. Respondents were able to select multiple options.

4.1 Accesibilitate financiară

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Financial affordability represents the most frequently reported barrier, both in the process of finding housing and in maintaining it.

- High rental costs were mentioned by all 44 respondents (100%) at least once in Q14 or Q15.
- Lack of income or employment instability was mentioned by 39 respondents (88.6%) in relation to finding housing and by 43 respondents (97.7%) in relation to maintaining housing.

These data indicate that financial pressures are a determining factor of housing insecurity, affecting both initial access to housing and the ability to retain it over the longer term.

Focus group participants confirm that the lack of financial resources and rising market prices remain central issues; large variations were also mentioned in certain cities (e.g. Constanța, seasonality), affecting the ability to maintain housing.

4.2 Documentation and contracts

Difficulties related to documentation and the formalization of rental relationships are reported to a lesser extent, but remain relevant:

- The lack of rental contracts or required documentation was mentioned by 5 respondents (11.4%).

This barrier particularly affects housing stability and access to related rights (e.g. access to services or public support).

In the focus group, this barrier emerged as a systemic one: the requirement for an address/contract registered with the tax authority (ANAF) in order to update temporary protection data and to access benefits (e.g. school enrollment, allowances) creates the need for a formal contract, while some landlords refuse registration in order to avoid taxes or bureaucracy.

4.3 Discrimination

Discrimination by landlords or other actors on the housing market is reported by a share of respondents:

- Discrimination by landlords was mentioned by 9 respondents (20.5%).

Although it is not the most frequently reported barrier, discrimination contributes to limiting available housing options and may amplify existing vulnerabilities.

Within the focus group, differentiated rent increases were described when landlords learn that the applicant is Ukrainian, as well as the need for awareness-raising and non-discrimination messaging targeted at the general public and landlords.

4.4 Language barriers

Communication barriers represent a significant difficulty in the process of accessing housing:

- Language barriers were mentioned by 23 respondents (52.3%).

These affect interactions with landlords, understanding of contracts, and navigation of administrative processes related to housing.

Within the focus group, it was noted that language barriers increase the burden on organizations providing counseling, interpretation, and mediation services. Public institutions are not uniformly equipped with interpretation services, which complicates communication between beneficiaries of temporary protection and authorities or landlords. This situation affects access to social benefits and administrative procedures and generates confusion within the community, including through the circulation of incomplete or incorrect information via informal communication channels.

4.5 Overcrowding

Overcrowding is reported by a small proportion of respondents, but indicates the existence of suboptimal housing solutions:

- Overcrowding was mentioned by 2 respondents (4.5%).

4.6 Bureaucratic and legal barriers

Bureaucratic and legal barriers are reported sporadically:

- Bureaucratic or legal problems were mentioned by 2 respondents (4.5%).

Although infrequent, these barriers may have a disproportionate impact on the individuals affected.

Focus group participants also discussed the difficulty of long-term planning associated with temporary protection status (implications for integration prospects), as a background factor influencing housing decisions.

4.7 Barriers for vulnerable groups

The questionnaire indicates limited and non-separately quantifiable mentions: in open-ended responses and multiple selections, a small number of respondents indicated specific difficulties associated with individual or family vulnerabilities (e.g. disability, presence of children), but these mentions cannot be quantified as a distinct category based on the structure of the questionnaire. In the focus group, vulnerability was linked to landlords' perceptions regarding financial stability (doubts about rent payment and the risk of "sudden departure"), which may limit access to housing for vulnerable individuals.

Conclusions

Overall, questionnaire data indicate that financial barriers (high rental costs and income instability) represent the main obstacle to accessing and maintaining housing for Ukrainian refugees in the sample. These are followed by language barriers and, to a lesser extent, discrimination and documentation-related issues. Bureaucratic and legal barriers and overcrowding are reported less frequently, but contribute to the complexity of housing experiences.

Financial barriers remain central. The focus group explains the underlying mechanisms: high and volatile prices, landlords' reluctance, informality of contracts, conditioning access to benefits on the existence of an address/contract, and the linguistic pressure placed on organizations.

5. Housing support schemes

The analysis of support schemes is based on information reported by respondents regarding the support actually received in the housing domain, as well as current needs and suggestions regarding required support.

5.1 Public support

According to questionnaire responses, public support in the housing domain is reported by a relatively small number of respondents. In Q16, some respondents indicated local public authorities or public housing providers as sources of support for different types of assistance (e.g. counseling, mediation, or other forms of targeted support).

However, the questionnaire data do not allow for an exact and distinct quantification of each type of public support by service category, as Q16 was formulated as a matrix question with the possibility of selecting multiple providers for different types of support. Overall, public support appears less frequent compared to other forms of support reported by respondents.

5.2 NGO initiatives and mixed initiatives

Initiatives implemented by non-governmental organizations and faith-based organizations represent an important component of the support reported by respondents. In Q16, NGOs are repeatedly mentioned as providers of various types of housing-related assistance, including counseling, mediation with landlords, material support, or social support.

In addition, some respondents indicate mixed initiatives involving collaboration between NGOs, informal networks (friends, family), and, in some cases, employers. These forms of support reflect a fragmented intervention model based on the combination of multiple available resources.

5.3 Support received (Q16)

At an aggregate level, the data indicate the following situation regarding support received:

- 34 respondents (77.3%) report having received at least one form of housing-related support;
- 10 respondents (22.7%) report having received no type of support.

Reported support includes contributions from NGOs, local authorities, employers, or informal networks (friends, family). The structure of the questionnaire does not allow for a complete disaggregation of the frequency of each type of support by provider; however, the data indicate that informal support and NGO-provided support play an important role in complementing households' own resources.

Table 4. Support received and priority needs

Indicator	N	%
Received at least one form of support	34	77,3
Did not receive support	10	22,7
High need for financial support	—	—

Indicator	N	%
High need for mediation / counseling	—	—

5.4 Needs and suggestions (Q17–Q18)

Question Q17 assessed the level of need for different types of housing-related support, on a scale ranging from “not needed at all” to “extremely needed.” The responses indicate the existence of high levels of need in several areas, particularly with regard to:

- support for identifying housing;
- subsidies or financial support for housing costs;
- mediation with landlords;
- legal counseling regarding contracts and housing rights;
- information and orientation services.

The open-ended responses to Q18 highlight recurring suggestions related to:

- reducing rental costs or supporting rent payments;
- increasing the availability of clear and accessible information about housing;
- facilitating communication with landlords and authorities;
- developing more stable housing solutions over the medium and long term.

5.5 Capacity, coordination, and constraints of support schemes (focus group)

The focus group shows that housing support is affected by:

- funding/budget reductions and the closure of certain financial support components (cash assistance), including the mention of the termination of a program in 2025 (July);
- an increased workload for organizations (counseling, interpretation, mediation with landlords), in the context of limited resources, including human resources;
- fragmentation and lack of coordination between databases, with risks of overlap among beneficiaries across different actors;

- the transition from previous support mechanisms (e.g. “50-20”) to a more limited framework focused on “new arrivals,” perceived as difficult to implement in practice.

Conclusions

Questionnaire data show that, although most respondents have benefited from certain forms of support, this support is often fragmented and insufficient to counterbalance the financial and structural pressures of the housing market. NGOs and informal networks play a central role in providing support, while public schemes are less visible in respondents’ reported experiences. The needs expressed by respondents indicate a clear demand for more consistent, predictable measures focused on financial affordability and housing stability.

Support exists, but it is fragmented and insufficient. The focus group explains the structural pressures: reduced funding, increased burden on NGOs, imperfect coordination, and the volatility of support mechanisms.

Overall, housing support appears fragmented and project-dependent, with a low level of medium-term predictability.

6. SWOT analysis of the housing market

Strengths

- High level of stabilization of housing demand: The majority of respondents (86.4%) have been in Romania for at least two years, indicating a transition from temporary solutions toward medium- and long-term housing arrangements.
- Partial capacity for self-sufficiency: A significant proportion of respondents (86.4%) fully or partially cover housing costs, reflecting a certain level of economic autonomy.
- Active role of NGOs and international actors: Questionnaire and focus group data indicate the existence of functional support mechanisms (counseling, mediation, targeted financial assistance) implemented by NGOs and international organizations.
- Existing basic legal framework: Beneficiaries of temporary protection have legal access to the private housing market and to essential public services, based on residence documents issued by the General Inspectorate for Immigration (IGI).

Weaknesses

- Structural dependence on the private rental market: Both housing demand and supply are

concentrated almost exclusively in the private sector, in the absence of significant public or social alternatives.

- Low financial affordability: High rental costs and income instability are reported as major barriers, affecting both access to and retention of housing.
- Contractual informality: The lack of registered rental contracts limits housing stability and access to related rights and benefits.
- Fragmentation of support schemes: Existing support is often temporary, dependent on external funding, and insufficiently coordinated among actors.
- Limited administrative capacity: Language and procedural barriers increase the burden on NGOs and local institutions.

Opportunities

- Development of predictable support mechanisms: The data indicate a clear need for more stable financial support or mediation instruments within the housing market.
- Strengthening interinstitutional coordination: The focus group highlights the potential for improving information exchange and harmonizing interventions between public and non-governmental actors.
- Capitalizing on existing good practices: Identified intervention models can be expanded or replicated in other local contexts.
- Integrating housing into integration policies: Linking access to housing with employment and social services can contribute to more sustainable solutions.

Threats

- Continued increase in rental costs: Market developments may amplify the risk of housing insecurity for households with limited resources.
- Reduction or interruption of funding: Dependence on external funding makes support schemes vulnerable to shifts in priorities.
- Discrimination and landlord reluctance: Discriminatory practices and refusals to rent to refugees limit access to available housing stock.
- Long-term uncertainty of legal status: The temporary nature of protection may affect long-term planning for both actors and beneficiaries.

7. Analysis of the policy and regulatory framework

This section analyzes the legislative and public policy framework relevant to access to housing for beneficiaries of temporary protection from Ukraine in Romania, in the context of developments

between September 2025 and January 2026. The analysis is based on national legislative documents as well as recent reports and operational updates from UNHCR, the International Organization for Migration (IOM), and partner organizations, including JRS Romania.

7.1 Housing legislation

In Romania, the right to housing is recognized for persons benefiting from a form of protection, including beneficiaries of temporary protection and beneficiaries of international protection, through the existing legislative framework. Law No. 122/2006 on asylum in Romania establishes the protection regime and the rights of persons who apply for or are granted international protection, including the possibility of accommodation in centers administered by public authorities when they lack sufficient material resources (Asylum Information Database [AIDA], 2025).

In the case of persons displaced from Ukraine, the majority are legally classified as beneficiaries of temporary protection, in accordance with Council Directive 2001/55/EC and the implementation decisions adopted at EU level starting in March 2022. Temporary protection provides a legal residence status and access to fundamental rights, without requiring the individual asylum procedure (UNHCR, 2025a).

In Romania, temporary protection is administered by the General Inspectorate for Immigration (IGI), which issues residence documents and a personal numerical code, required for access to public and private services, including renting housing. Beneficiaries of temporary protection have the right to establish residence in Romania and to access the private housing market under conditions similar to other legal residents, based on legal residence documents (UNHCR, 2025b).

In addition to access to the private market, the legislative framework also provides for temporary financial support measures to cover accommodation costs. According to Government Emergency Ordinance No. 96/2024, beneficiaries of temporary protection may receive a lump-sum financial allowance for accommodation expenses, of up to RON 750 per month for single persons and up to RON 2,000 per month for families, granted for a maximum of three consecutive months of stay in Romania. This measure was designed as a short-term support instrument to facilitate the transition toward autonomous housing solutions (UNHCR, 2025b; Dopomoha, 2025).

Overall, the Romanian legislative framework provides a legal basis for access to housing for beneficiaries of temporary protection. However, direct public support for accommodation costs is temporary and

limited, which in practice leads to a high level of dependence on the private housing market and on complementary support mechanisms.

7.2 Framework for social housing

Access to social housing in Romania is regulated by general housing legislation and is administered at local level by public local authorities. Beneficiaries of temporary protection may apply for social housing under the same legal conditions as Romanian citizens, depending on locally established eligibility criteria and the availability of the existing housing stock (UNHCR, 2025b).

However, recent reports show that the national stock of social housing is limited, while demand significantly exceeds supply, including among the local vulnerable population. This structural imbalance considerably reduces the effective access of beneficiaries of temporary protection to social housing, even when formal eligibility criteria are met (UNHCR, 2025a; JRS Romania, 2024).

In the context of refugees from Ukraine, the role of social housing in meeting housing needs is marginal, and medium- and long-term housing solutions rely predominantly on the private rental market. Recent national housing strategies emphasize the need to expand the social housing stock and to develop affordable housing solutions for vulnerable groups; however, the implementation of these measures is a long-term process with limited short-term impact on the situation of beneficiaries of temporary protection (UNHCR, 2025a).

7.3 Incentives for hosting beneficiaries of temporary protection

In Romania, there is no permanent system of structural incentives for hosting beneficiaries of temporary protection over the medium and long term. Support for hosting is provided through a combination of temporary governmental measures and programs implemented by international and non-governmental organizations, with a predominantly transitional character.

Romanian authorities have implemented, at different stages, lump-sum financial support schemes intended to partially cover accommodation costs and, in certain periods, food costs, for beneficiaries of temporary protection and, respectively, for host families. These measures have been limited in duration and adjusted over time, being designed as short-term support instruments rather than as stable mechanisms for rent subsidization or guaranteed access to housing (UNHCR, 2025b).

At the operational level, international organizations play a central role in providing housing-related support. UNHCR implements cash assistance programs, which may be used to cover housing costs

depending on identified needs, targeting in particular beneficiaries of temporary protection in vulnerable situations (UNHCR, 2025c). In addition, the International Organization for Migration (IOM) carries out housing and shelter interventions focused on access to safe and adequate housing, in collaboration with local authorities and non-governmental partners (IOM, 2025).

Non-governmental organizations, including JRS Romania, complement this framework by providing counseling services, mediation with landlords, social support, and by integrating housing support into broader integration programs. While these interventions contribute significantly to facilitating access to and retention of housing, they are dependent on external funding and have limited coverage capacity, and cannot substitute for the lack of structural public incentives for medium- and long-term hosting of beneficiaries of temporary protection (JRS Romania, 2024).

Overall, the current framework of incentives for hosting is characterized by fragmented and predominantly temporary measures, with a crucial role played by humanitarian actors and civil society, in the absence of structural housing policies dedicated to beneficiaries of temporary protection from Ukraine.

8. Conclusions – Part I

The analysis of the housing market for Ukrainian refugees in Romania highlights a relatively stabilized housing demand, oriented predominantly toward the private rental market, in the context of a prolonged stay for most respondents. Although a significant share of households manage to cover their housing costs, financial pressures remain the main source of vulnerability, exacerbated by rising rents and income instability.

The supply of affordable housing is limited and fragmented, with a low share of public, social, or institutional solutions. In this context, NGOs and international organizations play an essential role in facilitating access to housing through counseling, mediation, and targeted financial support. However, these interventions are often temporary and dependent on external funding, which limits their long-term sustainability.

The identified access barriers – financial, linguistic, administrative, and discriminatory – are confirmed by both quantitative data and the perspectives of institutional actors. The focus group highlighted the systemic mechanisms underlying these barriers, including contractual informality, landlords' reluctance, and administrative constraints.

Overall, the report underscores the need for more coherent and predictable interventions to reduce reliance on ad hoc solutions and to support the transition toward stable and affordable housing. Integrating the identified good practices and strengthening coordination among relevant actors represent key directions for improving the systemic response to the housing needs of Ukrainian refugees in Romania.

PART II – GOOD PRACTICES

9.

Introduction

This part of the report aims to identify and document good practices supporting access to housing among Ukrainian refugees in Romania, in line with the requirements of WP2 – Housing Market Analysis and Identification of Good Practices. The analysis focuses on examples in which the support received contributed to obtaining stable, safe, and dignified housing conditions, as well as to improving beneficiaries' well-being.

The data sources for this section are three in-depth qualitative interviews, conducted in Ukrainian, with Ukrainian refugees in different situations in terms of age, family composition, and professional trajectory. The interviews were selected based on the following criteria:

- the existence of a transition from temporary or unstable solutions toward more stable housing;
- the involvement of relevant support actors (non-governmental organizations, public programs, landlords);

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- the potential replicability of the support mechanisms described;
- relevance for different categories of vulnerability (families with children, older persons, persons with disabilities or health problems).

The interviews conducted by JRS Romania with members of the refugee community from Ukraine are:

- M.P., conducted on 14.10.2025
- O.A., conducted on 15.10.2025
- S.L., conducted on 05.11.2025

The analysis of the three good practices presented in this section shows that access to and retention of housing for Ukrainian refugees in Romania is based on a combination of personal resources, temporary support, and context-adapted interventions. In all documented cases, housing solutions are not the result of standardized or permanent institutional mechanisms, but of flexible arrangements built progressively, which made it possible to avoid losing housing and to maintain adequate living conditions in a context characterized by uncertainty and financial pressures.

The support analyzed in these good practices is time-limited and oriented toward stabilization, being provided at critical moments in beneficiaries' trajectories. It included targeted financial contributions to cover housing costs, support in identifying housing, mediation with landlords, as well as interpretation and counseling services. The interviews indicate that these interventions did not replace beneficiaries' capacity to sustain their housing in the long term, but functioned as support factors that reduced the risk of housing insecurity during a period of heightened vulnerability.

Transversally, the documented good practices highlight the central role of non-governmental organizations in facilitating access to housing, especially when language, administrative, or economic barriers limit refugees' direct interaction with the private rental market or with public institutions. NGOs appear as intermediary actors who fill gaps in the public system through flexible and tailored services, without, however, having structural instruments that would ensure permanent housing solutions.

At the same time, these good practices highlight the fragile nature of the housing stability achieved, which remains dependent on external factors such as income levels, access to the labor market, and landlords' willingness to maintain flexible contractual relationships. The documented experiences show that, in the absence of predictable public mechanisms in the medium term, housing stability is maintained through individual effort and complementary support, rather than through systemic solutions.

This section does not aim to present ideal or fully transferable models, but to document concrete mechanisms that work in practice under the current conditions of the housing market in Romania. The analysis of good practices thus provides an empirical basis for understanding how different actors contribute to supporting access to housing and for grounding reflections on the development of more coherent and more sustainable interventions in the future.

Good practices are not presented as universally replicable models, but as illustrative examples of mechanisms that function in the current context of the housing market.

9.1 Limitations of the good practices analysis

The analysis of good practices presented in this section is based on a limited number of three in-depth qualitative interviews conducted with Ukrainian refugees in different housing situations. This approach enables a detailed understanding of individual experiences, but does not provide a basis for generalizations to the entire population of beneficiaries of temporary protection in Romania.

The documented good practices reflect subjective, self-reported experiences, influenced by each interviewee's specific context, the timing of the interview, and the types of support accessed. The analysis does not aim to provide a comparative evaluation of the effectiveness of different programs or interventions and does not include the perspectives of landlords or of all institutional actors involved in each case.

In addition, the selection of good practices was oriented toward cases in which access to or retention of housing was possible, which may lead to an under-representation of situations where interventions did not achieve the desired results or where barriers could not be overcome. In this sense, good practices should not be interpreted as universally applicable solutions, but as illustrative examples of mechanisms that worked in specific contexts.

Despite these limitations, the analysis provides relevant exploratory insights, complementing the quantitative data and institutional analysis in Part I of the report and contributing to a more nuanced understanding of housing access dynamics for Ukrainian refugees in Romania.

10. Good practice 1 – Transition from informal hosting to stable housing through a combination of NGO support and personal resources

Actor profile

Beneficiary M.P. is a Ukrainian refugee with prior professional experience in air traffic control, who arrived in Romania together with his family. The household includes children and an older person with health problems, and one of the children was subsequently diagnosed with autism, which significantly influenced the integration pathway and access to public support.

Housing support was initially provided through informal professional networks (colleagues in the field), later through temporary public programs, and at a critical stage through financial assistance provided by JRS Romania for a limited period.

Accessibility and inclusion

Access to housing was facilitated through a combination of informal and institutional support. The NGO intervention made it possible to cover a transition period in which household income was insufficient to sustain the high rental costs, especially in the context of the need to rent two separate dwellings to meet the needs of the extended family.

This transition from informal hosting to autonomous renting is described by the beneficiary as follows: “At first we stayed in one of our colleagues’ apartments... and when I started earning money, I started renting an apartment.”

Support was adapted to the family’s specific situation, taking into account existing vulnerabilities and the loss of eligibility for certain public programs due to administrative criteria (for example, related to the child’s participation in educational services).

Sustainability and funding

The sustainability of the housing solution was based on the gradual increase of the beneficiary’s financial autonomy following labor market integration, with NGO support playing a clearly temporary and stabilizing role. The short-term financial assistance contributed to preventing a housing crisis at a time of heightened vulnerability.

The financial support provided by the NGO played a stabilizing role at a critical moment, as the beneficiary emphasizes:

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“I remember it was for three months... it was very helpful, because my income barely covered the rent for two apartments and living expenses.”

Involvement of refugees

The beneficiary was actively involved in identifying housing solutions and managing family resources. Decisions regarding relocation, proximity to the workplace, and care for vulnerable family members were made autonomously, with targeted support from the organizations involved.

Replicability

This good practice highlights the value of “bridge support” interventions—time-limited financial and social support that facilitates the transition to stable housing. The model is replicable in similar contexts, especially for families with multiple vulnerabilities, provided that flexible NGO support mechanisms and collaboration with informal or professional networks exist.

The stabilization of the housing situation is reflected in continuity over time: “For the past two years we have had the same apartment—it is quite comfortable... now we have stabilized and it is fine for us.”

This good practice shows that temporary financial support provided at a critical moment contributed to maintaining housing continuity and to avoiding a housing crisis. The beneficiary’s account indicates that the support received was time-limited and complemented the household’s own resources during a period when income barely covered basic housing costs.

Stabilization of the housing situation became possible in the context of labor market integration and the maintenance of the same dwelling over a longer period. The case indicates that transitional interventions can have a significant impact when they are aligned with beneficiaries’ subsequent capacity to sustain housing costs.

11. Good practice 2 – Retaining housing through the relationship with the landlord and targeted NGO support

Actor profile

Beneficiary O.A. is an older Ukrainian refugee with prior professional experience in the IT field, who arrived in Romania together with his family. Although he has high professional skills, he faces exclusion from the labor market due to age and has insufficient income to cover housing costs.

Accessibility and inclusion

Access to housing was made possible through direct rental from a private landlord who demonstrated a high level of flexibility and trust. In the absence of consistent public support, the landlord's tolerance toward the temporary accumulation of debt was a key factor in preventing eviction.

The retention of housing is closely linked to the relationship of trust with the landlord: "We have a very good landlord... even now we have a debt, but he says: don't worry, stay here."

The support provided by JRS Romania, in the form of a targeted financial contribution, helped stabilize the housing situation, even though it did not fully resolve the structural difficulties related to income and employment.

Sustainability and funding

The housing solution is financially fragile, but is maintained due to the relationship of trust with the landlord and the beneficiary's efforts to increase income through employment, even under conditions below his level of skills. This situation highlights the limits of sustainability in the absence of predictable public support mechanisms.

Exclusion from the labor market due to age directly influences the ability to sustain housing costs: "I am 57 years old... no one hires me because of my age... I found a simple job, with a small salary."

Involvement of refugees

The beneficiary is actively involved in maintaining housing by continuously seeking employment and communicating transparently with the landlord. He also reflects critically on his initial decisions, emphasizing the importance of preparedness for a long-term stay.

Replicability

Although individual relationships with landlords cannot be replicated as such, this case highlights the importance of mediation and building trust between refugee tenants and landlords. NGOs can play an essential role in facilitating such relationships and in preventing the loss of housing.

Even targeted financial support had a significant impact on housing stability: "I received support from JRS... it was 7,300 lei. And it helped. Of course it helped."

This good practice highlights the decisive role of the relationship with the landlord in retaining housing in a context of limited financial resources and difficulties in accessing the labor market. The interview indicates that the landlord's tolerance toward delayed rent payments was essential to avoiding the loss of housing.

The targeted financial support received from a non-governmental organization contributed to temporary stabilization, but did not eliminate structural vulnerabilities related to income. The case shows that, in the absence of predictable public support mechanisms, housing retention may depend to a large extent on individual arrangements with a high degree of fragility.

12. Good practice 3 – Mediation, language support, and counseling to facilitate access to housing for older persons

Actor profile

Beneficiary S.L. is an older refugee woman, a pensioner, who arrived in Romania after a period spent in another transit country. She faces multiple vulnerabilities: advanced age, limited financial resources, lack of language skills, and family separation.

Accessibility and inclusion

Access to housing was decisively facilitated through the direct intervention of JRS Romania, which provided support in identifying suitable housing, mediation with real estate agents and landlords, translation, and clarification of contractual documents. Without this support, the beneficiary states that she would not have been able to access or maintain housing under decent conditions.

For the beneficiary, access to housing is closely linked to a sense of safety: "The most important thing is that I feel safe and have my own place, even if it is temporary."

Sustainability and funding

NGO support was complemented by access to public financial support programs for rent, which enabled the stabilization of the housing situation in the medium term. Although the solution is not permanent, it provides an essential level of safety and predictability for the well-being of an older person.

Involvement of refugees

The beneficiary was actively involved in the decision-making process, expressing her preferences and learning, with support, to manage the contractual relationship. Subsequently, she reflects on the experience and formulates concrete recommendations for other refugees, demonstrating an increased level of acquired autonomy.

The lack of language skills is perceived as a major barrier in the process of accessing housing: “Before you sign the documents, make sure you understand everything or ask someone to translate. Because I do not know Romanian and I do not know English well enough.”

The beneficiary emphasizes the importance of seeking support early: “Don’t be afraid to ask for help or advice from organizations from the very beginning.”

Replicability

This good practice is highly replicable for vulnerable groups, especially older persons, through strengthening mediation, interpretation, and housing counseling services provided by NGOs in collaboration with local authorities.

NGO support is associated with maintaining personal dignity: “I want to thank all the organizations for their help and, of course, the JRS organization. Thanks to them, we can still feel like human beings.”

This good practice underscores the importance of non-financial support—especially mediation, interpretation, and counseling—for access to housing among older persons and those facing language barriers. The beneficiary’s account indicates that without this type of support, accessing and understanding a housing solution would have been difficult or impossible.

Housing stability is mainly associated with a sense of safety and with clarity in contractual relationships, rather than with the permanent nature of the housing solution. The case highlights the role of non-

governmental organizations in facilitating access to housing for people with multiple vulnerabilities, especially in the absence of institutional alternatives adapted to this profile.

13. Cross-cutting lessons

The comparative analysis of the three good practices highlights several key lessons:

- Well-targeted, temporary support can prevent the loss of housing and facilitate transition toward more stable solutions.
- NGOs play a central role in compensating for language, administrative, and informational barriers, especially for vulnerable groups.
- The relationship with landlords is a critical factor for housing stability; mediation and trust-building are essential.
- The lack of predictability of public schemes limits long-term sustainability, even in good practice cases.
- The active involvement of refugees in decision-making contributes to more tailored and more durable solutions.

The beneficiary describes the support received as very useful, contributing to maintaining the household's financial and housing balance. The impact of temporary support is also reflected in beneficiaries' assessments:

"It was very useful... we are still managing and putting things together." (M.P.)

These lessons provide a solid basis for formulating policy and program recommendations aimed at strengthening access to adequate housing for Ukrainian refugees in Romania.

14. Policy recommendations

A. Short-term recommendations (0–6 months)

A1. Stabilizing access to housing and preventing housing loss

- Implement time-limited transitional financial support mechanisms ("bridge support"), with a limited

duration (1–3 months), to prevent evictions and support the transition to stable housing solutions.

- Introduce a rent guarantee fund (deposit/advance), managed by local authorities or in partnership with NGOs, to reduce initial barriers to access the private rental market.

A2. Reducing administrative and language barriers

- Fund interpretation and translation services for essential housing-related processes (renting, access to benefits, interaction with authorities), especially at local level.
- Develop and disseminate standardized, clear, multilingual informational materials on housing-related rights and obligations to reduce confusion and the circulation of incorrect information.

A3. Mediation and the relationship with landlords

- Expand housing mediation services carried out by NGOs and local authorities to facilitate access to housing, prevent discriminatory refusals, and maintain contractual relationships.
- Introduce support instruments for landlords (guarantees, counseling, limited incentives) to increase willingness to rent to beneficiaries of temporary protection under formal conditions.

B. Medium-term recommendations (6–24 months)

B1. Increasing the financial affordability of housing

- Develop rent subsidy schemes with clear eligibility criteria and predictable duration, targeted at vulnerable households.
- Integrate housing support with employment and socio-economic inclusion measures to enhance the sustainability of housing solutions.

B2. Expanding alternatives to the private market

- Gradually increase the stock of social housing and affordable housing, including beneficiaries of temporary protection within existing eligibility criteria.
- Develop transitional housing solutions (intermediate housing) for periods of 6–12 months, as a bridge between temporary shelter and autonomous renting.

B3. Coordination and institutional sustainability

- Strengthen inter-institutional coordination among authorities, NGOs, and international organizations through referral protocols, common vulnerability criteria, and mechanisms to avoid overlaps.
- Ensure multi-year funding for key services (housing counseling, mediation, language support) to reduce volatility and dependence on short-term projects.

B4. Targeted measures for vulnerable groups

- Implement integrated support packages for older persons, families with children, persons with disabilities or health problems, combining housing support with social support and counseling.
- Prioritize these groups in mediation and housing support programs, given the disproportionate impact of identified barriers on them.

The above recommendations aim to complement and strengthen the existing policy and intervention framework by shifting from temporary and fragmented measures toward more predictable, coordinated solutions focused on housing stability. They are grounded in the empirical data collected and in the documented good practices and can guide both short-term interventions and the development of more inclusive housing policies in the medium term.

15. Overall conclusions

This report analyzed how the housing market in Romania responds to the needs of Ukrainian refugees by combining quantitative data collected through a questionnaire with institutional perspectives from the focus group and individual experiences documented through good practices. The results from Part I indicate a high dependence on the private rental market, in the context of a limited supply of public or social alternatives and significant pressures on financial affordability. High rental costs, income instability, language barriers, and, to a lesser extent, discrimination and administrative difficulties outline a context of persistent housing insecurity for a substantial share of respondents.

The analysis of demand and supply shows that most Ukrainian refugees included in the study are in a relatively stabilized phase of stay in Romania, yet this stability is sustained primarily through individual efforts and through informal or complementary support mechanisms. Public housing support schemes are time-limited and have low visibility in reported experiences, while non-governmental organizations and informal networks play a central role in facilitating access to housing and in preventing its loss.

Part II of the report complements this structural analysis by documenting concrete good practices that illustrate how Ukrainian refugees manage to access and retain housing under the current market conditions. The analyzed good practices confirm the conclusions from Part I, highlighting the importance of temporary support, mediation with landlords, and counseling and interpretation services. At the same time, they show that achieved housing stability is often fragile and dependent on external factors such as available income and landlords' willingness, in the absence of predictable public mechanisms in the medium and long term. The documented good practices analytically confirm the conclusions from

Part I, showing that, in the absence of structural housing policies, stability is achieved through fragile combinations of temporary support, individual effort, and informal relationships.

Overall, the report highlights a gap between the housing needs of Ukrainian refugees and the current capacity of the system to provide structural and sustainable solutions. Existing interventions function largely as targeted or transitional responses that mitigate the effects of market pressures but do not eliminate them. Integrating findings from the market analysis with lessons derived from good practices underscores the need for more coherent, coordinated, and housing-stability-oriented policies and interventions, capable of moving beyond the logic of temporary support and responding more adequately to the realities of a prolonged stay of Ukrainian refugees in Romania.

15.1 Key messages for decision-makers

Based on the analyses presented in Part I and the good practices documented in Part II, the following key messages synthesize the main findings relevant for decision-makers.

- The private rental market is the main provider of housing for Ukrainian refugees, but it operates under significant affordability pressures in the absence of sufficient public alternatives.
- High rental costs and income instability represent the main risks for accessing and retaining housing, affecting even households that have been in Romania for several years.
- Public housing support schemes are time-limited and insufficiently predictable, reducing their ability to ensure medium- and long-term stability.
- Non-governmental organizations play an essential role in facilitating access to housing through mediation, counseling, language support, and targeted financial assistance, filling gaps in the public system.
- Language and information barriers continue to significantly affect access to housing and related rights, for both refugees and the institutions supporting them.
- The relationship with landlords is a determining factor for housing stability, and the lack of public mediation and guarantee instruments increases the risk of housing loss.
- Housing stability currently achieved is often fragile, dependent on individual arrangements and temporary support rather than on structural mechanisms.
- Vulnerable groups (older persons, families with children, persons with health problems, or language barriers) are disproportionately exposed to housing insecurity risks.
- There is a gap between actual housing needs and the current capacity of public policies to respond to a prolonged stay of Ukrainian refugees in Romania.
- Transitional interventions can prevent housing crises, but the development of coherent and

coordinated policies is necessary to provide more stable and more inclusive solutions in the medium and long term.

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