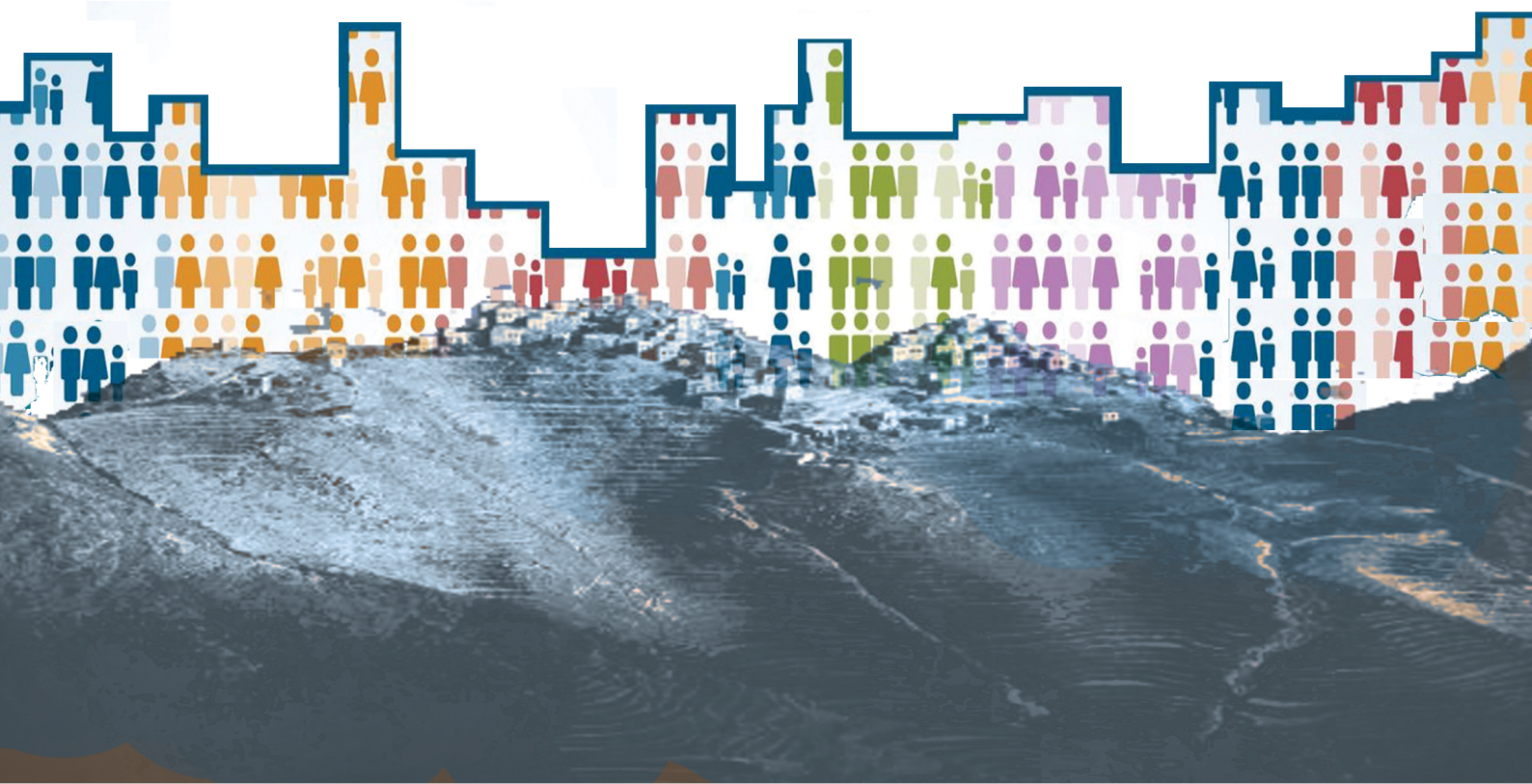


Yemen Shelter/NFI/CCCM Cluster Housing

Rental Market **Assessment**

September 2018

Dhamar Governorate



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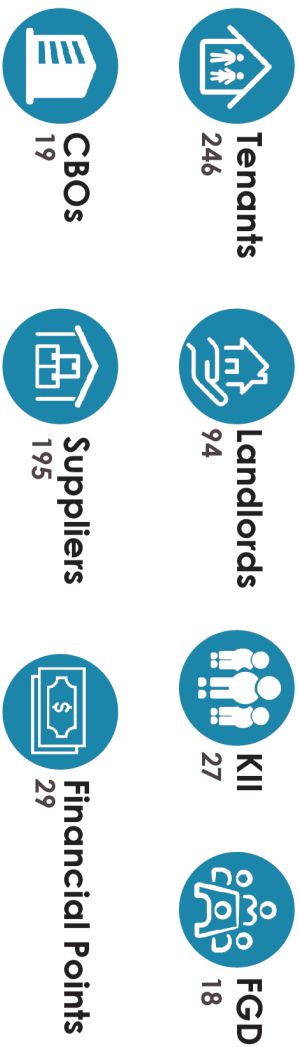
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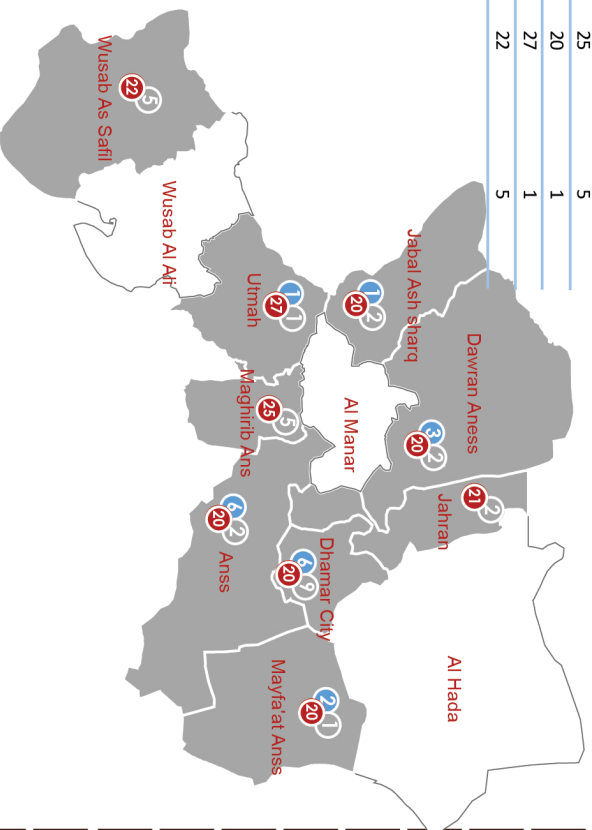


The Samples of The assessment



CBOs, Suppliers, and Financial Points Sample

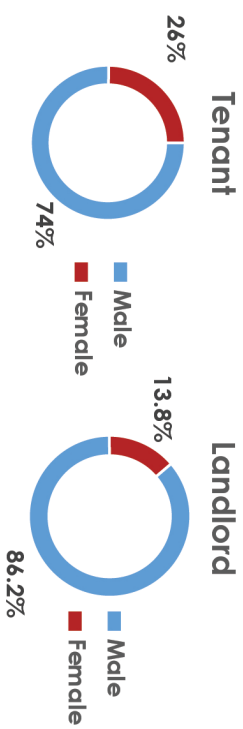
Districts Name	CBOs	Suppliers	Financial Points
Anss	6	20	2
Dawran Anness	3	20	2
Dhamar City	6	20	9
Jabal Ash sharq	1	20	2
Jahran	0	21	2
Maghirb Ans	0	25	5
Mayfa'at Anss	2	20	1
Utmah	1	27	1
Wusab As Safil	0	22	5



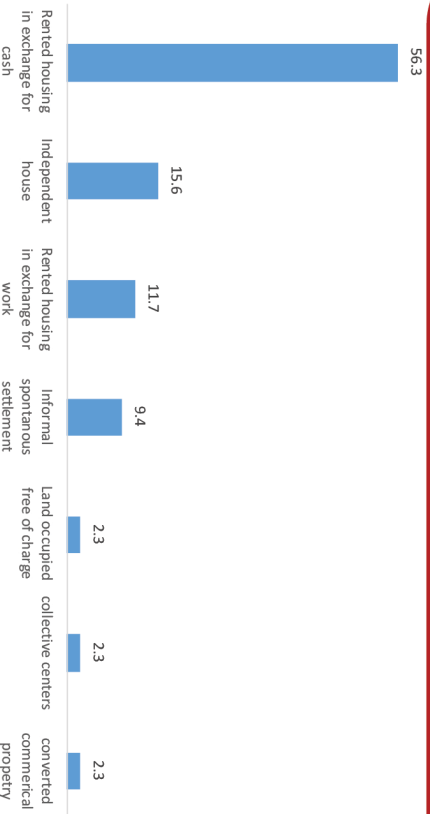
* The other districts are not targeted



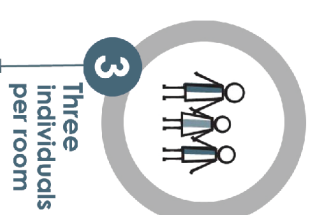
Gender



The Majority of Housing Inhabited by the IDPs



Income and Expenses and The Crowding Index



Introduction

General information about the Governorate:

Dhamar Governorate covers an area of 9,495km² (3,666 sq. mi). Its population, according to the 2004 Yemeni census, is “1,330,108”. The number of IDPs in the Governorate has reached (121,416) according to TEPM (Task Force on Population Movement Yemen)| 17th Report - August 2018.

What is the Objective of this Assessment?

The Preparedness Assessment is guided by a number of objectives. The main objective is to support Clusters’ priority preparedness activities through providing an independent preparedness assessment about “Housing Rental Market Assessment and Host Community Capacity Assessment”.

What is the Source of the Data?

The assessment uses primary data which is collected through qualitative and quantitative research methods. The qualitative methods are key informant interviews (KII) and Focus Group Discussions (FGD). For the quantitative data collection, a set of tools have been developed, specifically the landlords’ questionnaire, the tenants’ questionnaire, the exchange and remittance agents’ questionnaire, CBOs questionnaire, NFI/Shelter suppliers’ questionnaire, and the local authority questionnaire.

The Geographical Coverage in Dhamar Governorate

The districts distributed among the targeted sample of Dhamar Governorate are 9: Wusab As Safil, Aniss, Dawran Aniss, Dhamar City, Jabal Ash Sharq, Jahran, Utmah, Maghirib Aniss, and Mayfaat Aniss.

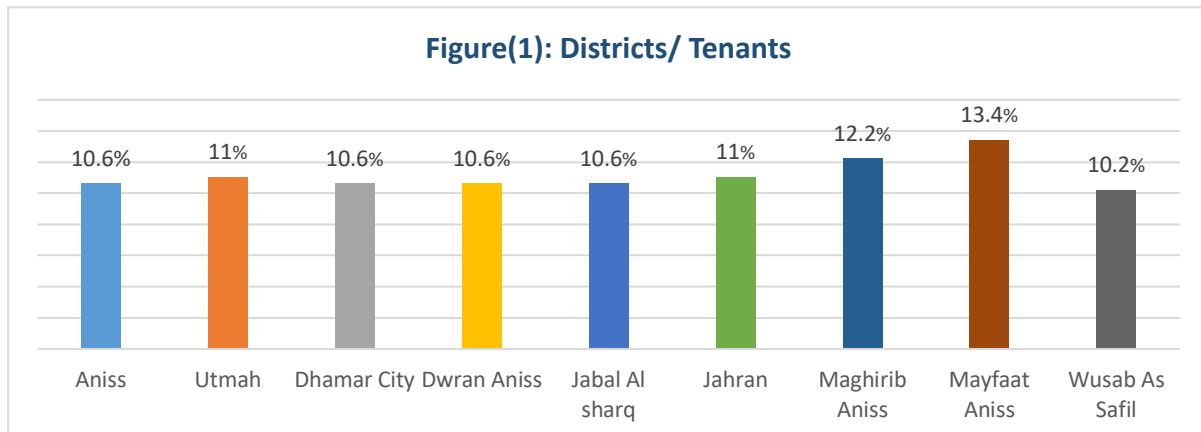


Section 1: Housing Rental Market Assessment

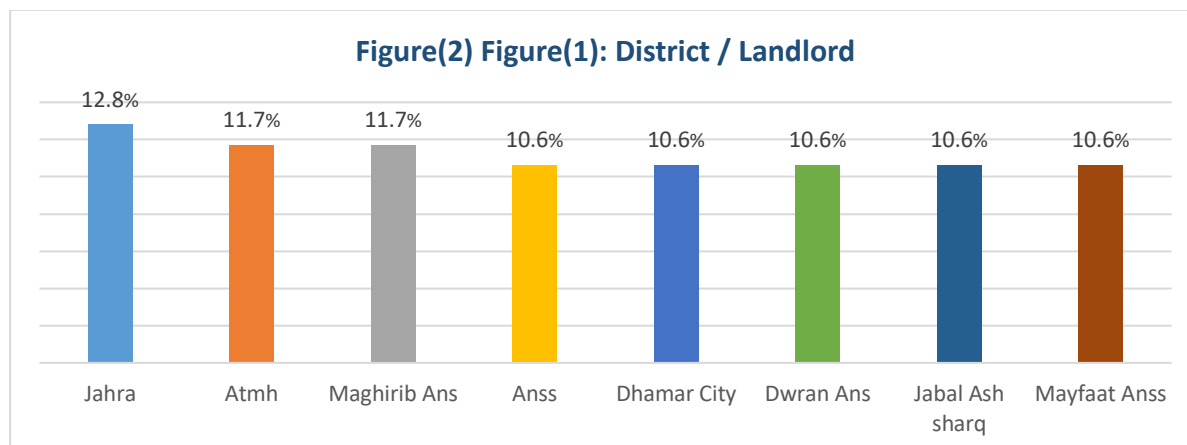
1. Demographic details

1.1 Targeted Districts

The results of the tenant analysis of Dhamar Governorate shows that the tenants were distributed to Dhamar’s districts as shown in figure (1).

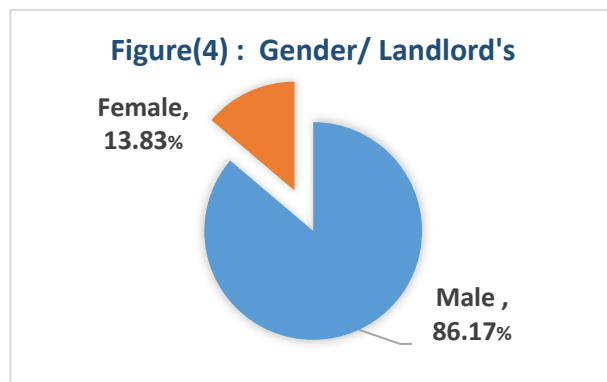
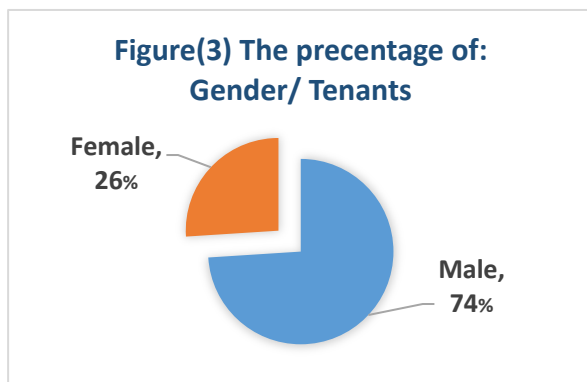


In the same context, Figure (2) shows the distribution percentage of the landlords’ sample among the nine districts of Dhamar.



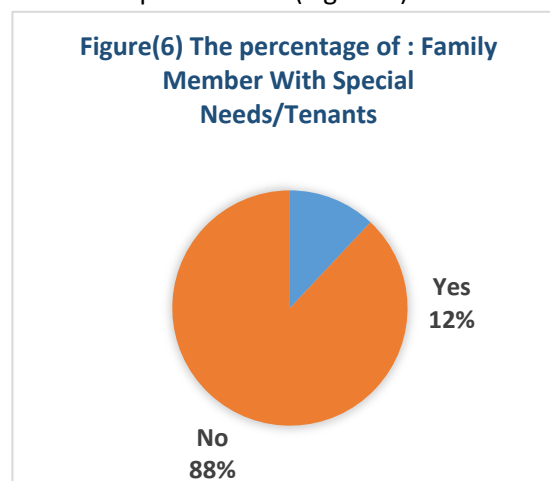
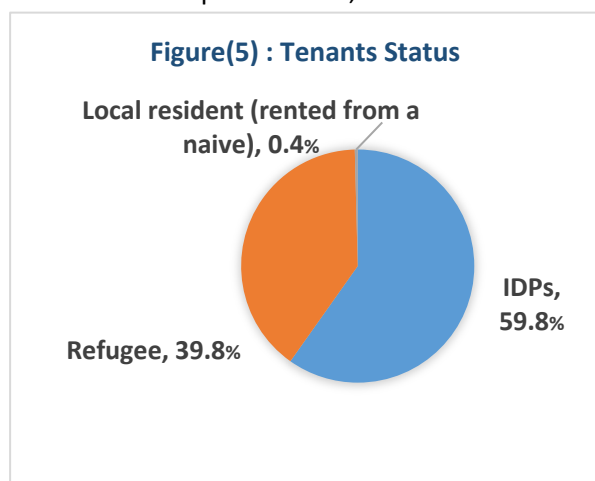
1.2 Gender (Landlords / Tenants)

Figure (3) shows that the gender distribution of the tenants’ sample which is 74% males and 26% females. As for the gender distribution of the landlords’ sample, 86.17% are males and 13.83% are females, Figure (4).



1.3 Tenant Characteristics

The assessment reveals that 39.8% of the tenants' sample are local residents of the area, 59.8% are IDPs, and 0.4% are Refugees (figure.5). These percentages reflect the high numbers of IDPs that have settled in Dhamar Governorate. In addition, the analysis shows that 12% of tenants have family members with special needs, and 88% do not have cases with special needs (Figure.6).



1.4 Household Age Category (Tenants)

The analysis (Table 1) illustrates the tenants' age category in the target districts. Tenants fall into two categories: 37.71% are over 18 years to 55 years, and 40.15% over 5 years to 18 years. Followed 20.16% of tenant members that are less than 5 years old, and 1.98% of family members over 55 years. And according to the results of the analysis, the gender of the tenants is 50.09% male and 49.91% female. These results reveal the magnitude of suffering endured by the greater part of the household which are women, children and elderly people, especially IDPs.

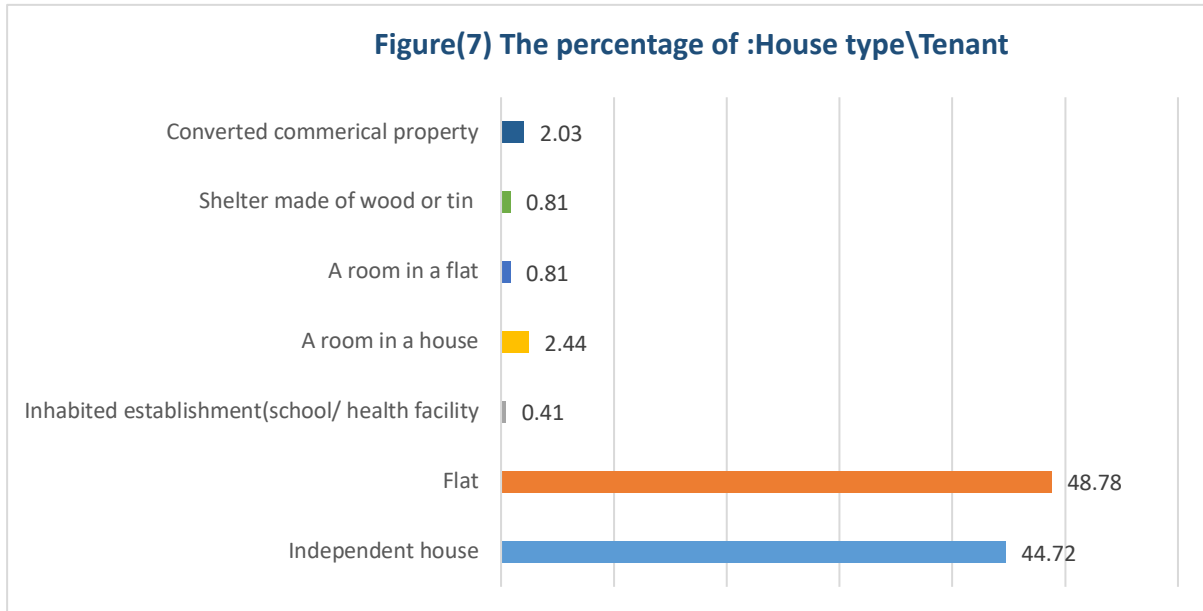
Table (1): Age and Gender of the Tenant Family Members

Gender	under 5 years		from 5 to 18 years		More than 18 – 55 years		Older than 55 years		Total	
	number	%	number	%	number	%	number	%	number	%
Male	177	51	367	53	306	47	12	34	862	50.09%
Female	170	49	324	47	343	53	22	61	859	49.91%
Total	347	100	691	100	649	100	34	100	1721	100.00
% Within Age	20.16%		40.15%		37.71%		1.98%			

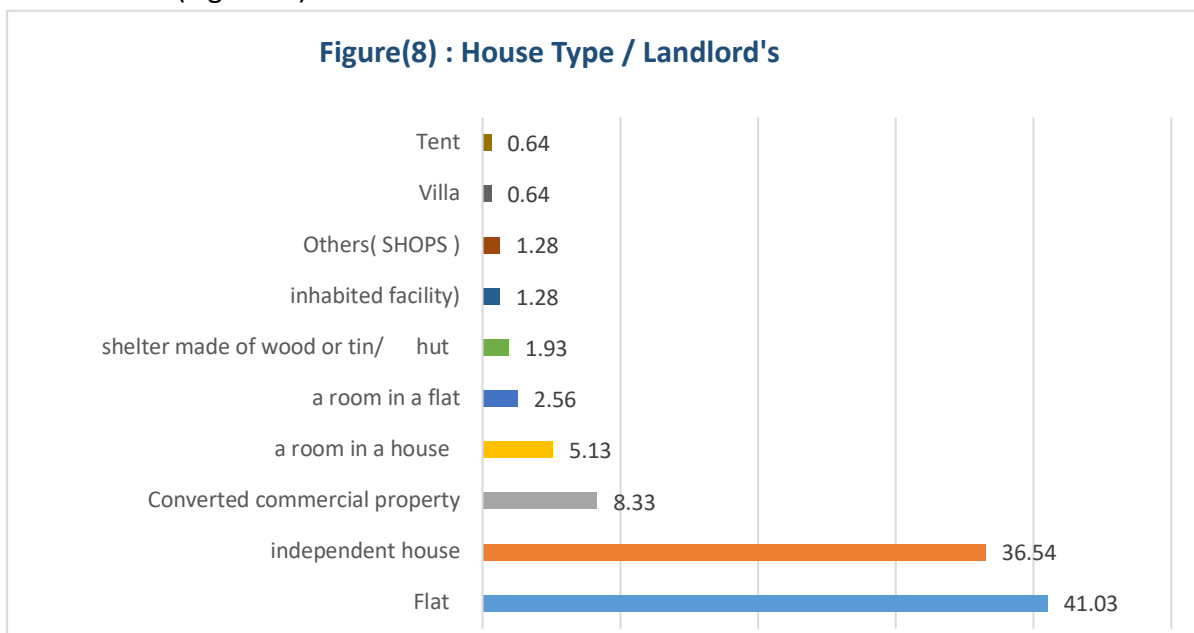
2 Details of the Rented Housing

2.1 Type of Housing (Tenant / Landlords)

Figure (7) shows the types of housing rented by tenants. 48.78% rented flats, 44.72% rented independent housing, 2.44% rented a separate room in a housing, 2.03% lived in converted commercial property, 0.81% made wood/tin shelter, 0.81% rented a room in a flat, and 0.41% inhabited school/health facilities, Figure (7).

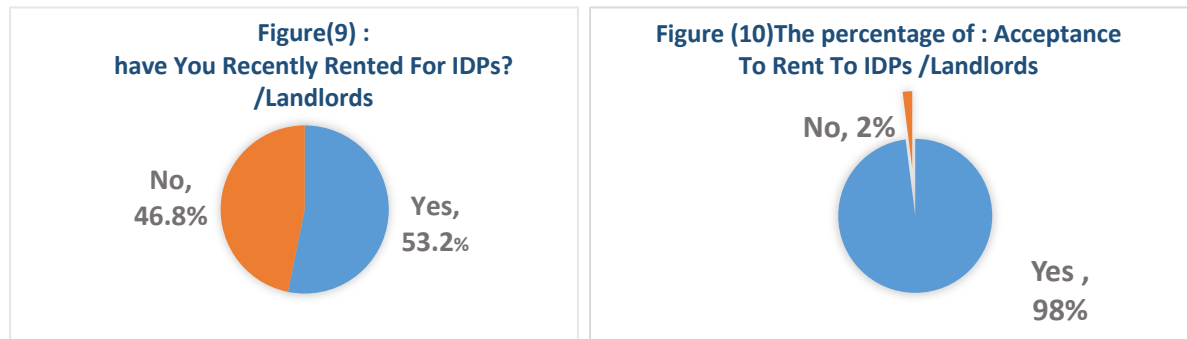


In the same context, when consulting with landlords they mentioned the following housing types: 41.6% flats, 36.54% independent housing, 5.13% a single room in a housing, 1.28% occupied properties (schools, health facilities etc.), 1.93% shelters (tin sheds / wood shacks/hut), 8.33% commercial properties, 2.56% a single room in a flat, 0.64% villa, and 0.64% tents. (Figure. 8).

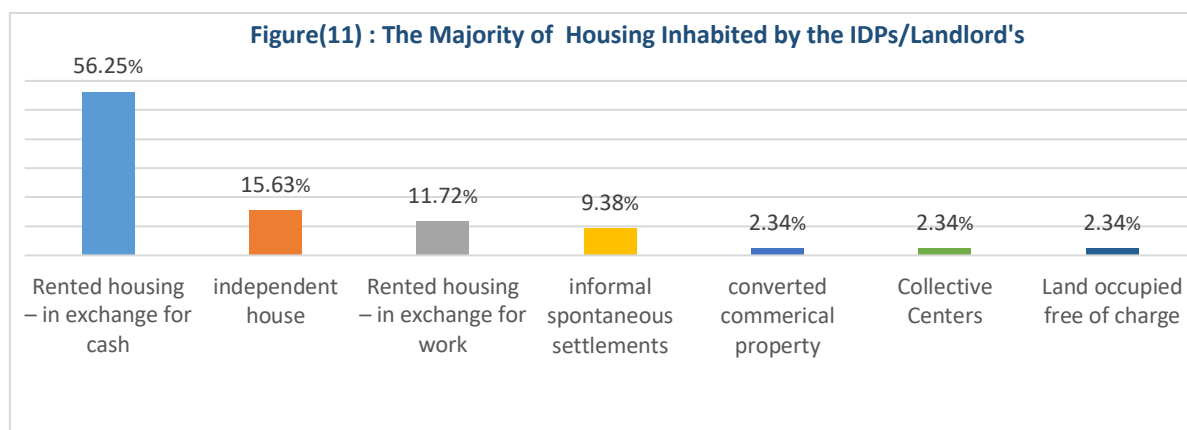


2.2 Rent for IDPs

The analysis shows that 53.2% of the landlords have rented housing to IDPs, while 46.8 have not rented to IDPs (Figure. 9). The analysis of the landlords' data shows that 98% do not have a problem renting their housing to IDPs, while 2% are not willing to rent to IDPs (Figure.10).

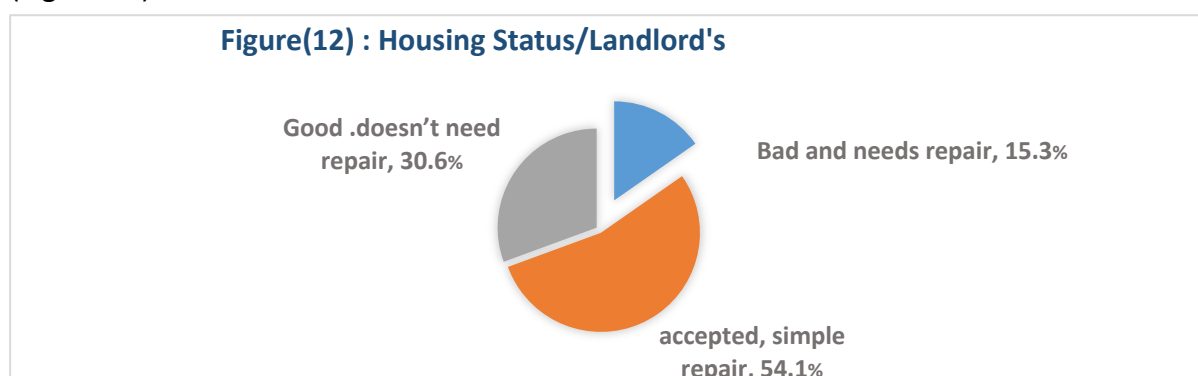


In the same context, the landlords' analysis results show that 56.25% of housing rented by IDPs are housing in exchange for cash, 15.63% rented independent housing, 11.72 % rented housing in exchange for labor, 9.38% live in informal spontaneous settlements, and the remaining percentage is illustrated in figure (11).



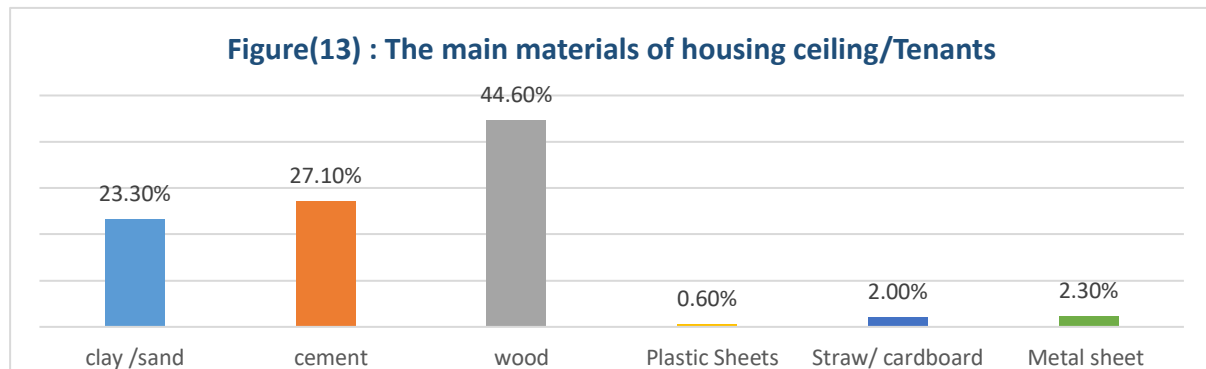
2.3 State of Housing

The data analyzed from the landlord's sample within the Governorate indicate that 54.1% of the housing managed by the landlords are in acceptable conditions and need simple repairs, 30.6% are good and do not need repairs, and 15.3% are in bad conditions and need repairs (Figure.12).



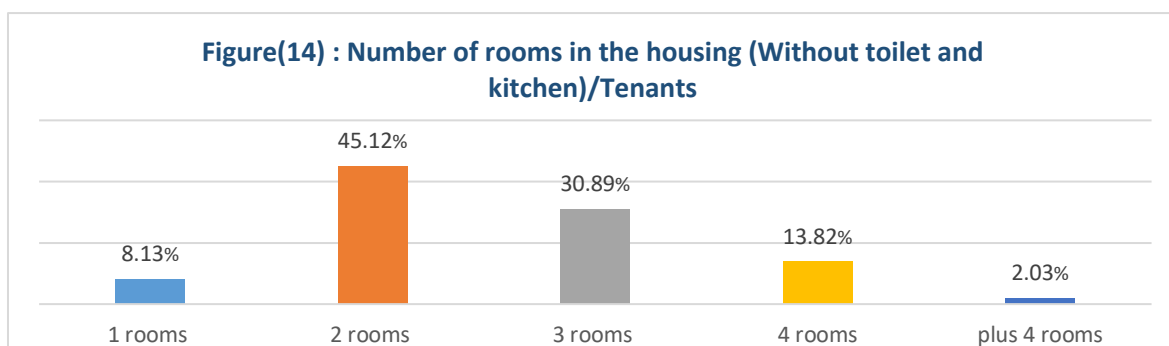
2.4 Materials used for Ceilings of Housing

Figure (13) shows that the main materials used for the ceilings of the rented housing are: wood 44.60%, cement 27.10%, and clay/sand 23.30%, metal sheets 2.30%, straw/cardboards 2%, and plastic sheets 0.60%. These ratios indicate that 67.90% of tenants live in old housing with wood/clay ceilings, and around 27% live in new housing with cement ceilings.

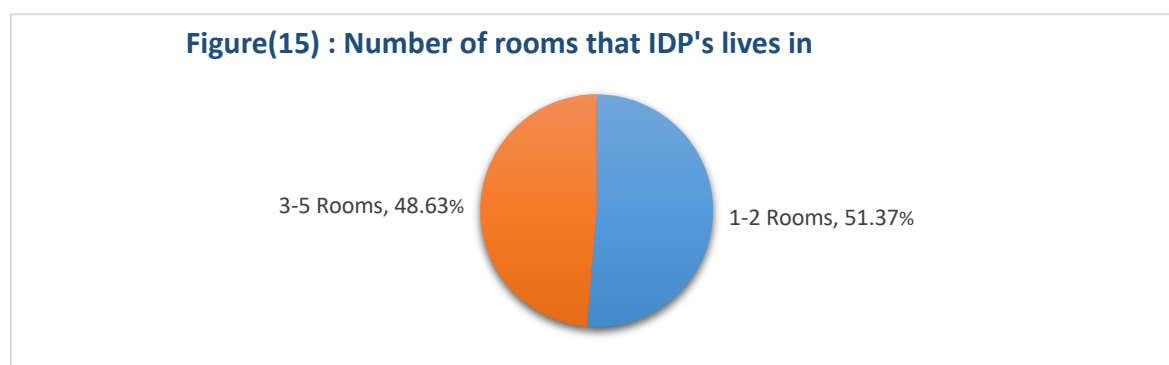


2.5 Number of Housing rooms

The analysis of the tenants' sample show that 45.12% of tenants live in housing that had 2 rooms, 30.89% had 3 rooms, 13.82% had 4 rooms, 8.13% had 1 room, and 2.03% had more than 4 rooms. The results of the analysis (Figure.14) indicate that the majority of tenants live in housing that have two to three rooms which is confirmed by the crowding index. Table (1) shows that every three individuals share a room; the total number of the tenants' family members (1721) divided by the total number of rooms (641) excluding kitchen and toilet.

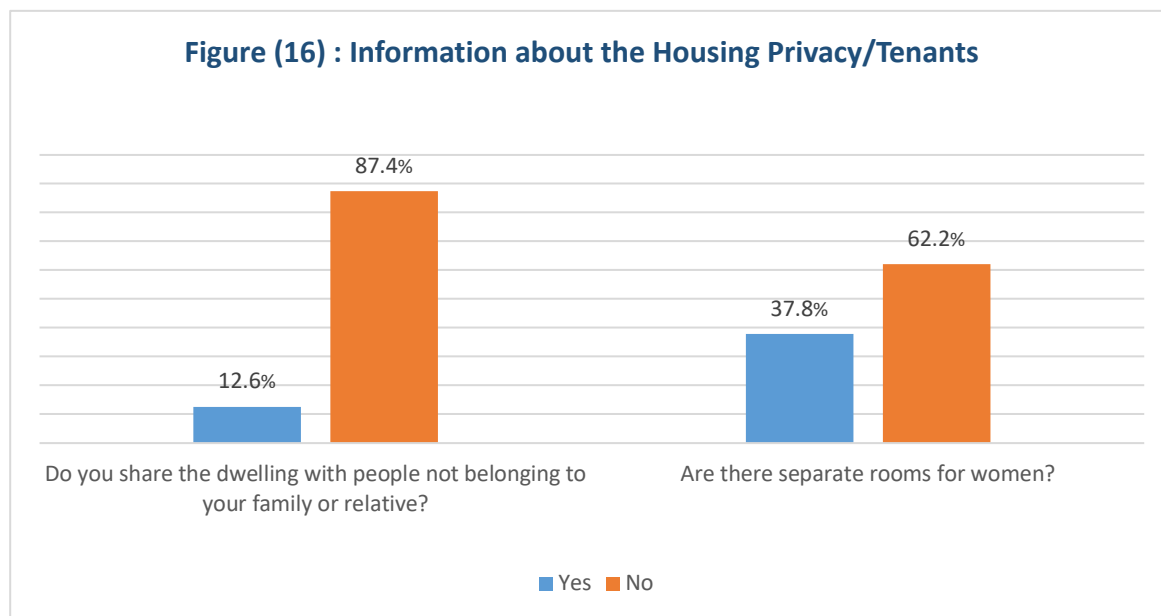


IDPs tenants in Dhamar Governorate as previously mentioned are 59.8% of the tenants Figure (5), of these IDPs, 51.37% of them live in one to two rooms Figure (15).



2.6 Privacy of the Housing

Figure (16) shows that 87.4% of the tenants do not share the rented housing with non-family members, while 12.6% share the rented housing with families from outside the family. This may indicate the lack of privacy for these families. The analysis also reveals that 37.8% of the tenants' sample have separate rooms for women, whereas 62.2% of the sample do not have separate rooms for women.



2.7 Availability of Toilets in the Housing

The results of the study sample analysis (Figure. 17) shows that 96.3% of housing have a toilet, while 3.7% do not. The study also showed that 96.6% of housing have toilets inside the housing, and 3.4% have toilets outside of the housing. Also, 77.8% of tenants do not have separate toilets for women, whereas 22.2% have separate toilets for women.

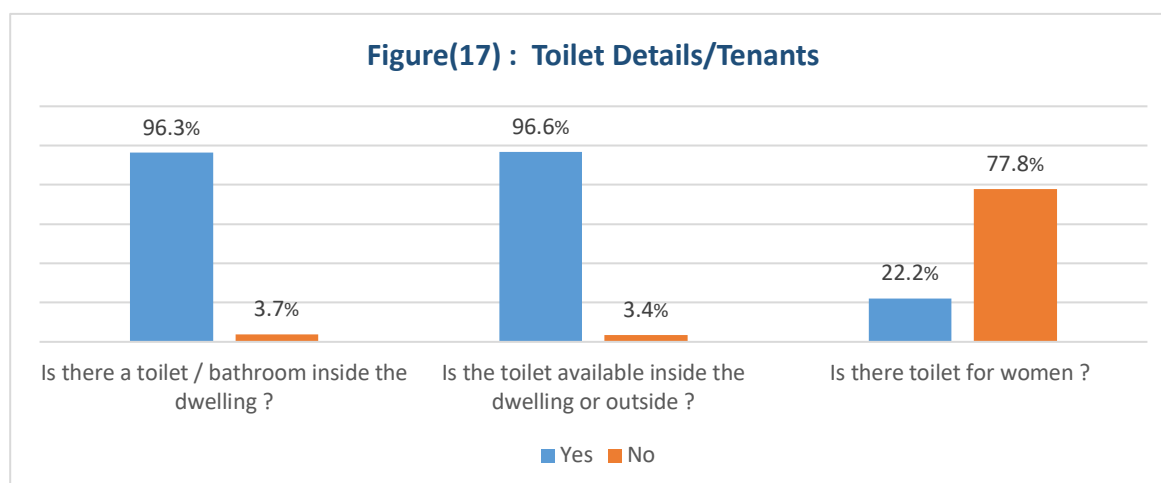
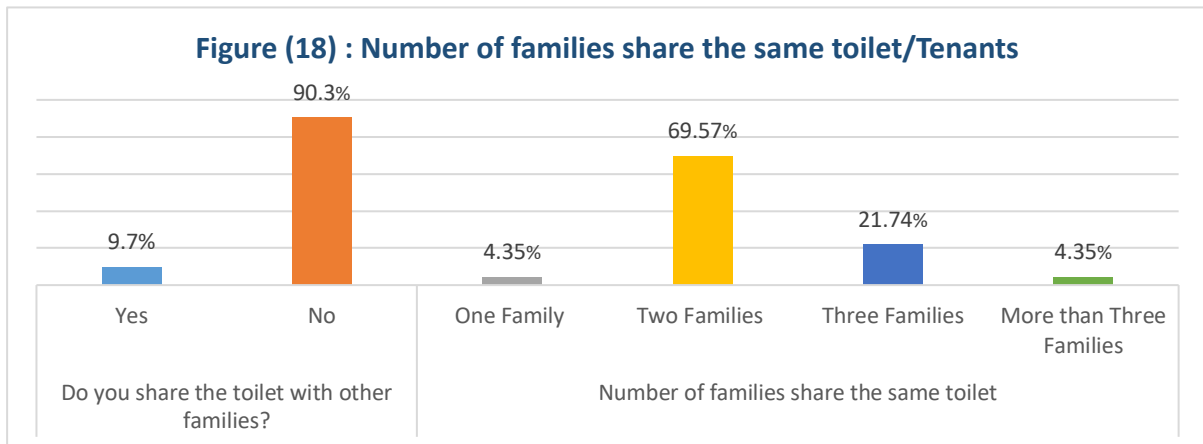
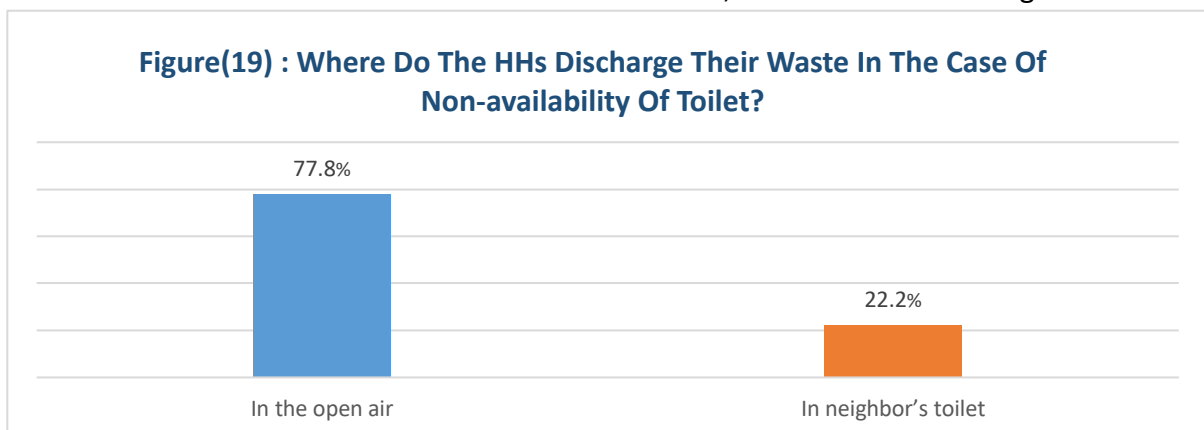


Figure (18) illustrates the number of families that share a toilet. 90.3% of tenants did not share the toilet with other families, whereas 9.7% shared the toilet with other families. The study also shows that the number of families that shared a toilet. Two families shared a toilet

are 69.57%, three families shared a toilet 21.74%, one family that shared the toilet with another family 4.35, and more than three families that shared a toilet 4.35%. These statistics indicate the great lack of privacy that most families endure in this area.

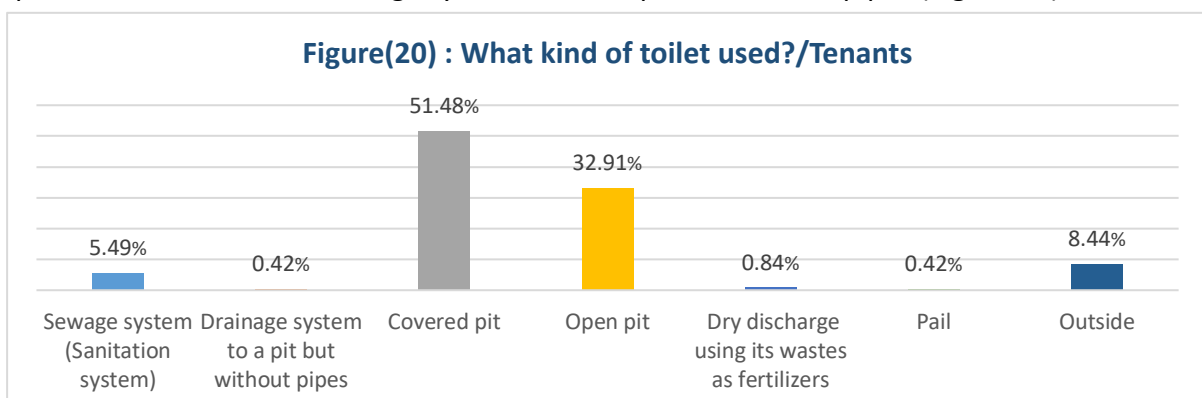


The Figure (19) shows the alternatives in case of unavailability of toilets. 77.8% of tenants who do not have access to a toilet use the outdoor area, and 22.2% use the neighbor’s toilet.



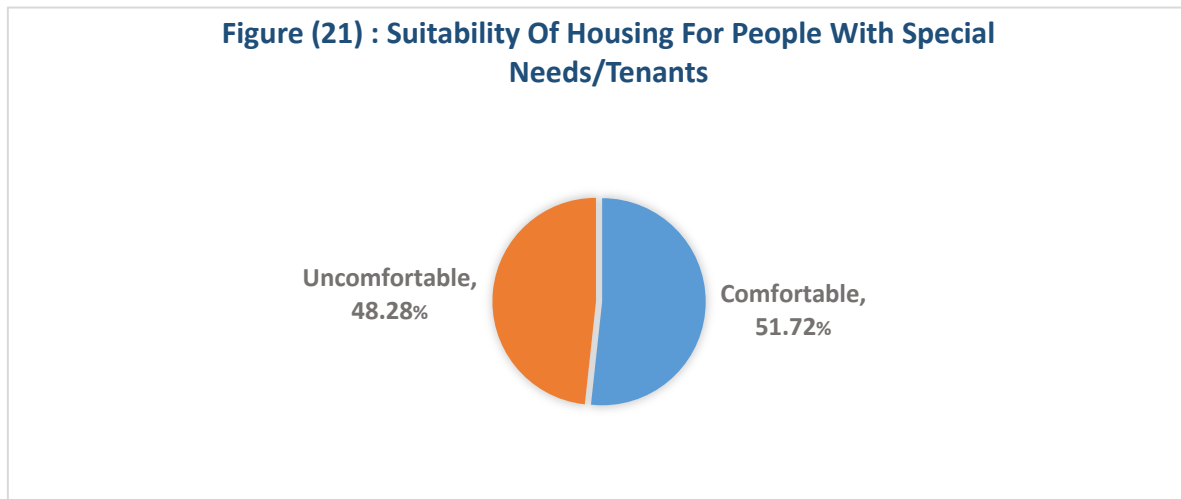
2.8 Type of Sanitation System

The analysis shows that 51.48% of tenants live in housing that use covered cesspits (covered sewer hole), 32.91% use open cesspits, 8.44% of the sample use the outside area, 5.49% use the proper sewage system, 0.84% dry discharge using its wastes as fertilizers, 0.42% use pails, and 0.42% use a drainage system to a cesspit but without pipes (Figure.20).



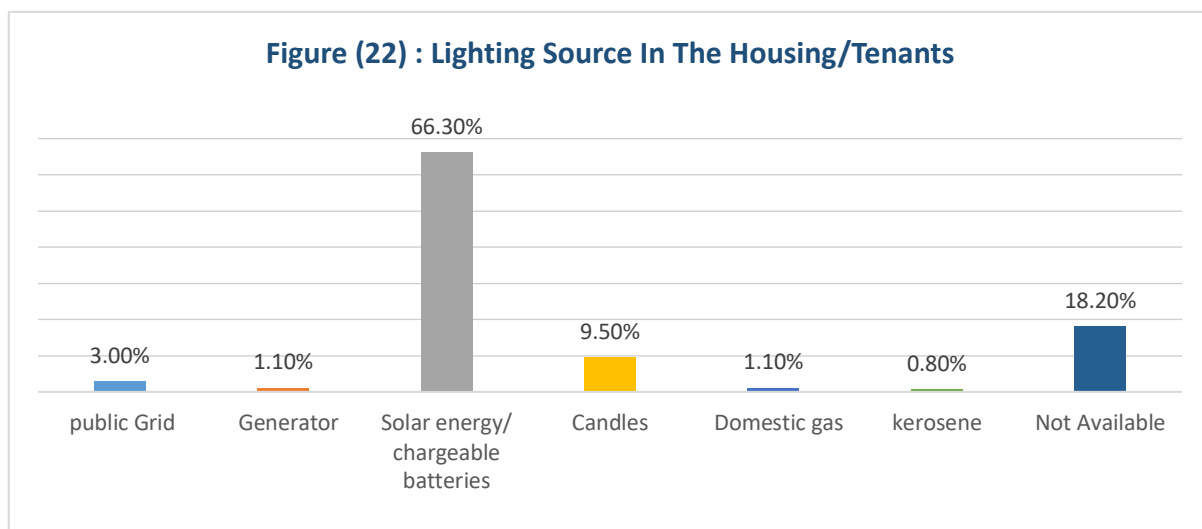
2.9 Suitability of Housing for People with Special Needs

The study shows that 51.72% of tenants who have family members with special needs say that the area is comfortable for people with special needs, while 48.28% say it is not comfortable (Figure.21). However, it is common not only in this area but all over the country that there is a lack of proper accommodations and a general disregard towards the basic requirements and special facilities necessary for individuals with special needs.



2.10 Source of Lighting

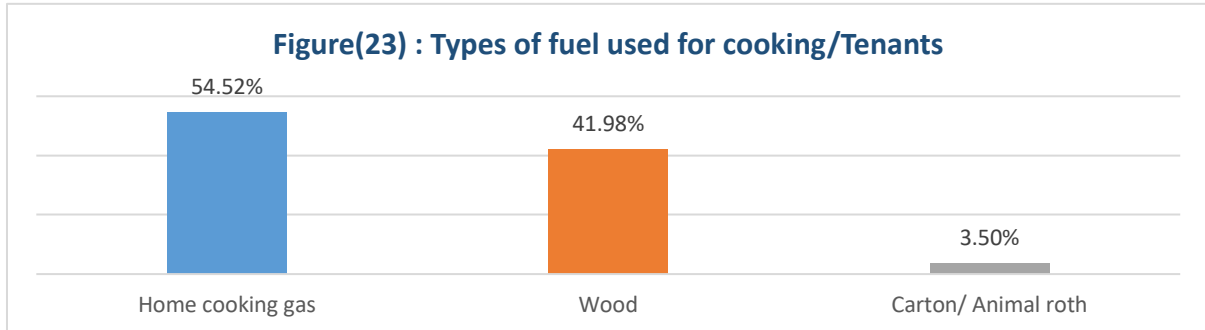
The study shows that 66.30% of the tenants' sample use the solar system and rechargeable batteries, 18.20% do not have electricity, 9.50% use candles, 3% use the public grid, 1.10% use generators, 1.10% uses domestic gas for lighting, and 0.80% uses kerosene (Figure. 22).



2.11 Type of Fuel used for Cooking

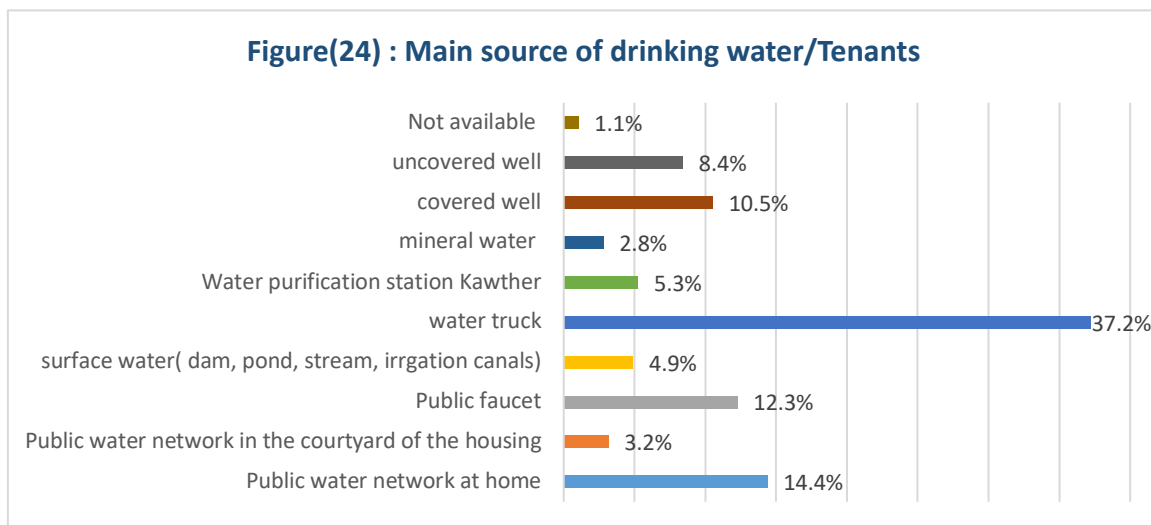
The analysis shows that 54.52% of the tenants' sample use domestic cooking gas, 41.98% use wood, and 3.50% use carton/animal Roth (animal waste) Figure (23). This may suggest that 46.30% of the sample, who currently uses improper materials for cooking, lacks sufficient financial resources to secure the gas for cooking. These results reflect the difficult

circumstances encountered by a large number of tenants, especially IDPs, who cannot afford to buy cooking gas and thus are forced to use unhealthy alternatives that are harmful for both the tenants and the environment. In addition to that, obtaining these alternative fuels adds an extra burden and hardship on the family, especially women and children, (Figure. 23)



2.12 Source of Drinking Water

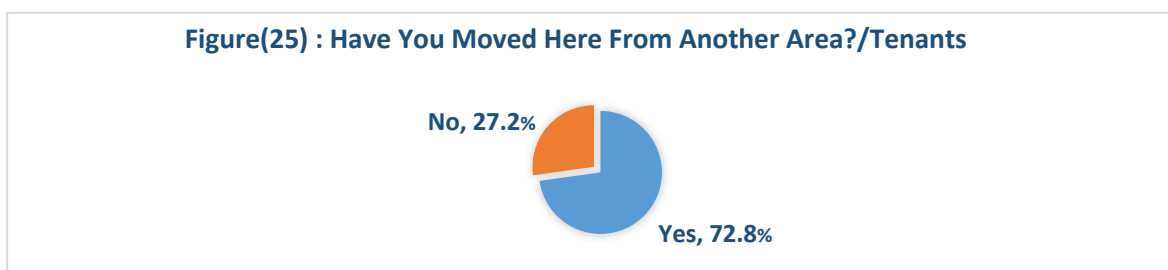
Figure (24) illustrates the sources of drinking water for tenants, which are as follows: water trucks 37.2%, the public water network 14.4%, public faucet 12.3%, covered wells 10.5%, uncovered wells 8.4%, water purification stations 5.3%, surface water (ponds, dams, streams, irrigation canals) 4.9%, public water network in the housing' yard 3.2%, and not available 1.1%.



3. Accessing Housing

3.1 Transfer from Former Residence (Geographical Area):

Figure (25) shows that 72.8% of the tenants in this assessment have moved either from

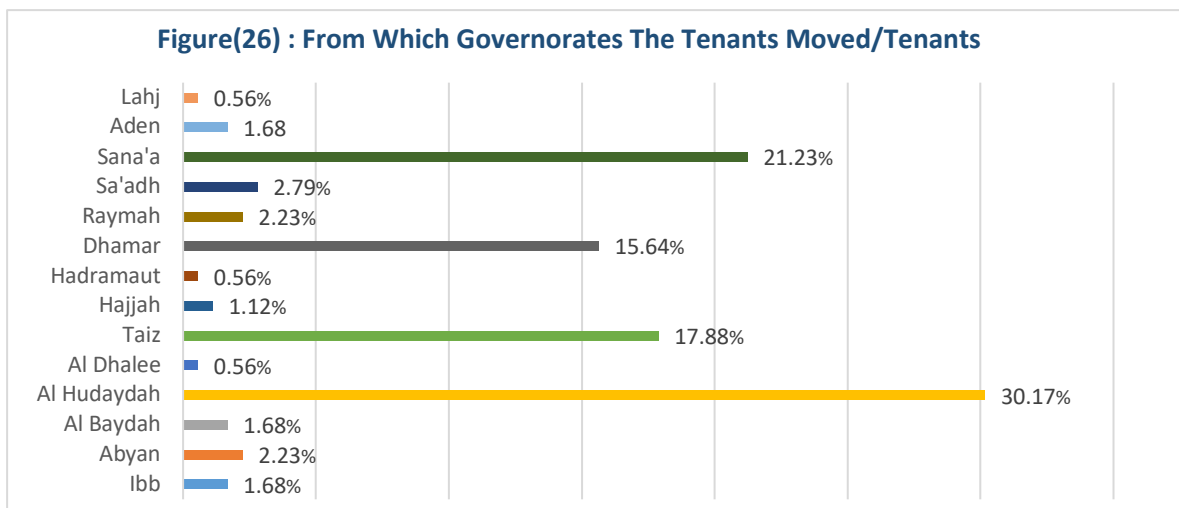


within the Governorate of Dhamar itself, or displaced from other Governorates. The tenants who are local residence of the area are 27.2% of the sample, and 72.8% are IDPs.

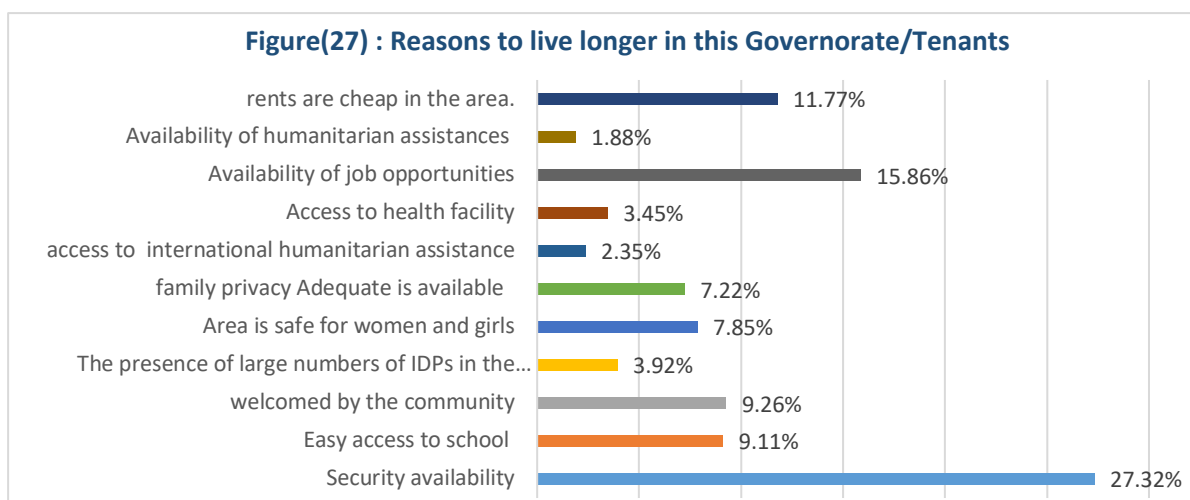
Results illustrate the areas from which the tenants moved from. 30.17% from Al Hudaydah, 21.23% from Sana'a, 17.88% from Taiz, 15.64% from Dhamar itself, the rest are shown in Figure (26).

3.2 Choosing the Governorate for Residence

The analysis of the tenants' data shows that 27.32% said that they moved to the Governorate of Dhamar for security reason, 15.86% for job opportunities, 11.77% for cheap rent, 9.26% for the welcoming nature of the local community, 9.11% for ease of access to schools, 7.85% because it is safe for women and girls, 7.22% for adequate privacy for the family, 3.92% for the presence of large numbers of other IDPs, 3.45% for ease of access to health services, 2.35% for access to international aids, and 1.88% for access to humanitarian assistance.



The results of the focus groups sessions confirm that the majority of IDPs in Dhamar chose to move to this area for the following reasons: safe area to live in, job opportunities, social relations, availability of services, and proximity to areas of conflict such as Al-Hudaydah, Taiz, and Al- Baydah.



3.3 Difficulties in Obtaining Housing and Stability

Figure (28) shows that 55.3% of the tenants faced difficulties in obtaining a housing and 44.7% did not face any difficulties.

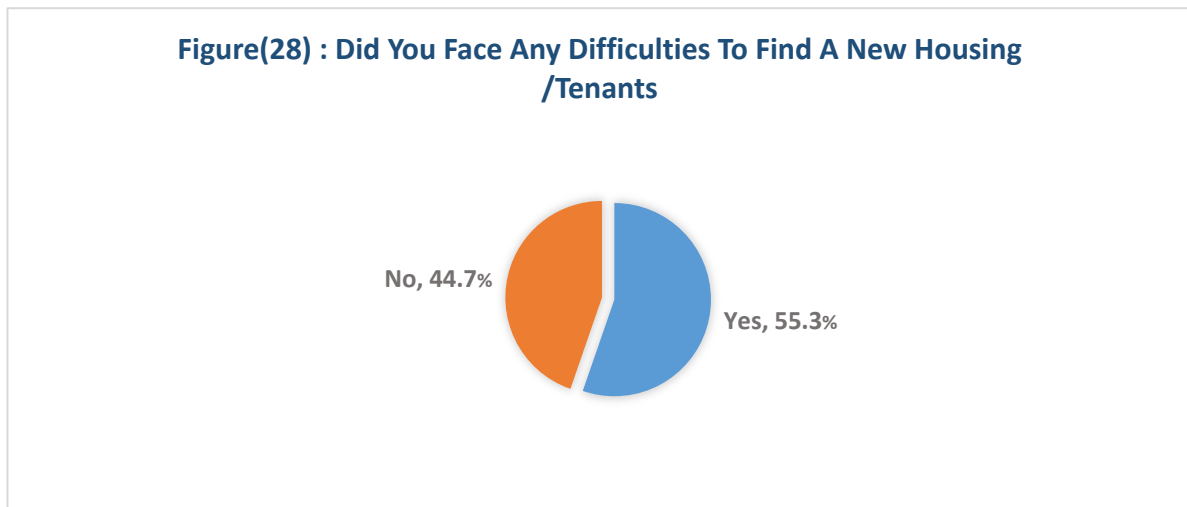
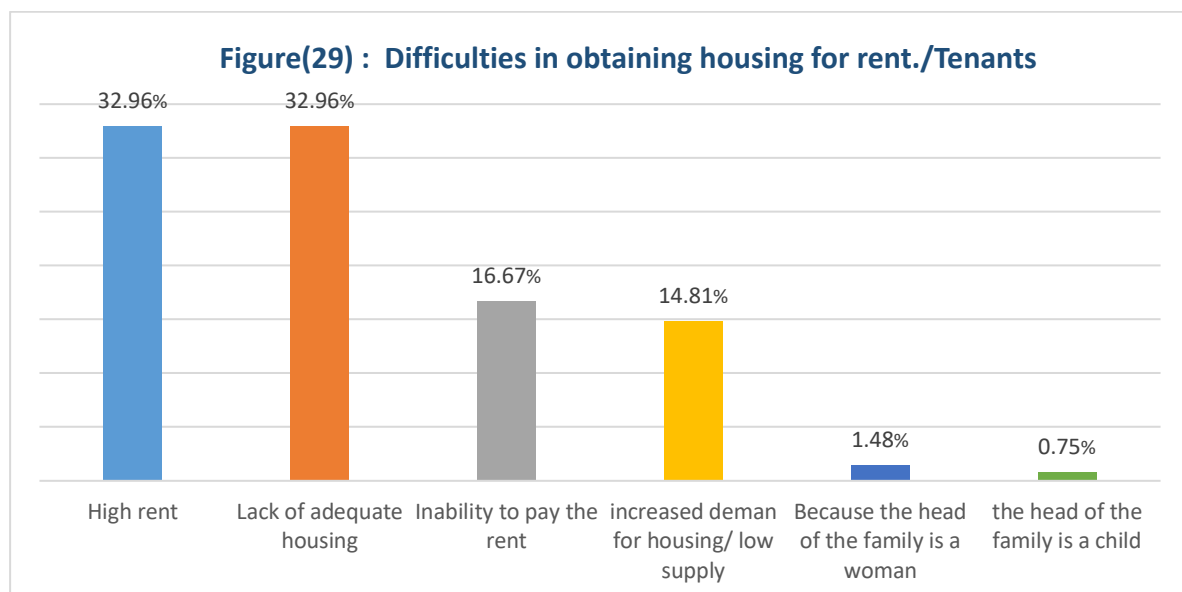


Figure (29) illustrates the difficulties faced by the tenants as follows: high rent costs 32.96%, lack of adequate housing 32.96%, the increase demand on housing and low supply 14.81%, inability to pay rent (loss of jobs/ no salaries) 11.48%, tenant’s poverty (cannot earn or have no money) 5.19%, because the head of the family is a woman 1.48%, because the family is headed by a child 0.74%, and not being welcomed by the local community 0.37%.



These results reflect that the main difficulties faced by tenants in obtaining a housing for rent are: lack of housing for rent, inability of poor tenants to pay rent, and unavailability of job opportunities.

Figure (30) illustrates the landlords’ sample main challenges in the rental market. These challenges are as follows: 16.23% high rate of nonpayment, 14.14% high demand for

housing, 13.16% high costs of rent, 12.57% the demand of housing exceeds the availability of housing for rent (demand vs supply of rented housing), 6.28% lack of basic services, 5.76% unleased property, 5.76% lack of diversity in the housing stock, and the remaining challenges are shown in figure (30).

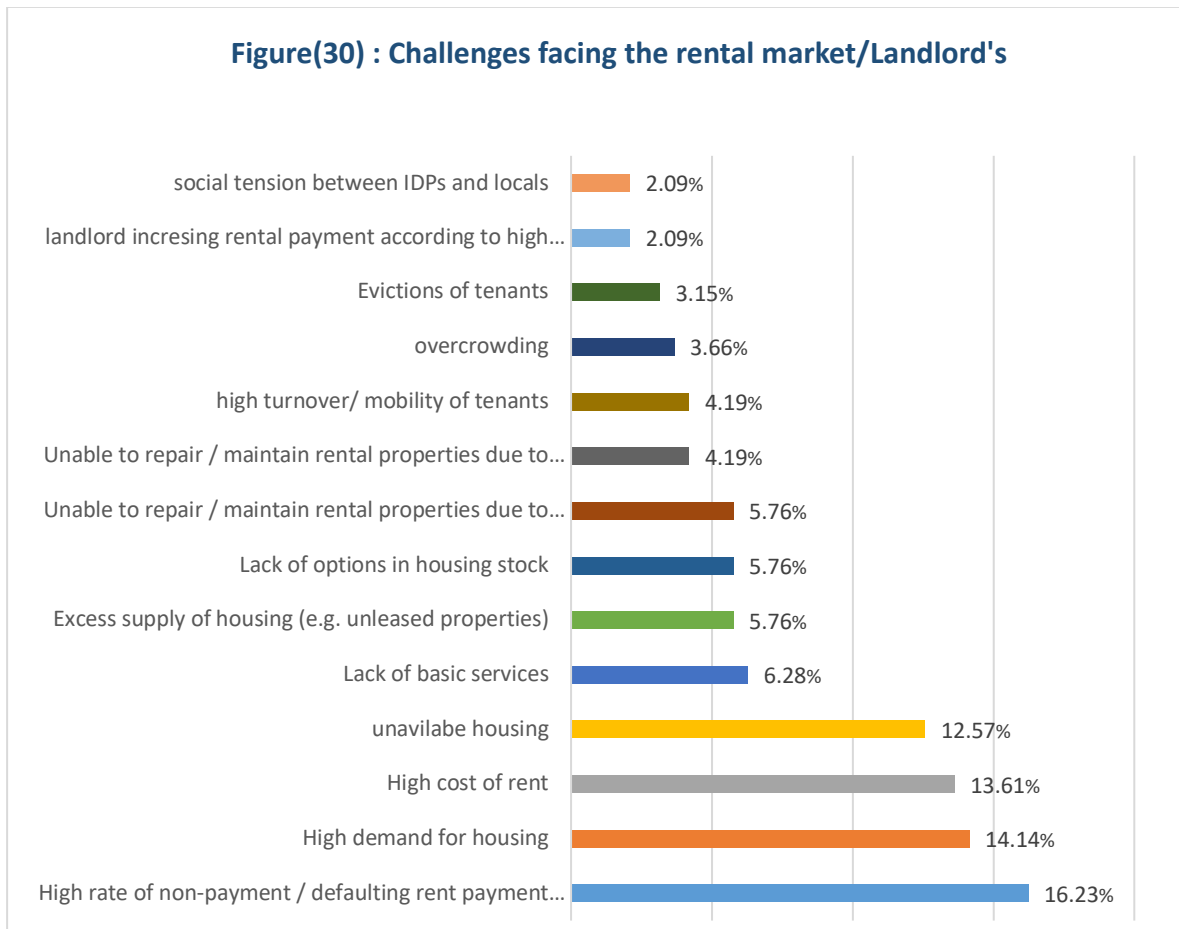
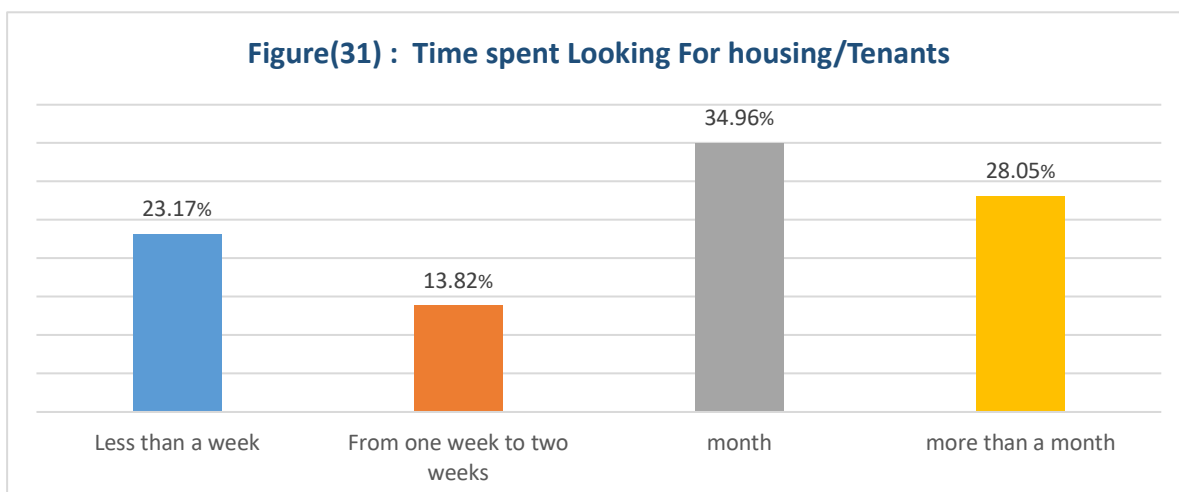


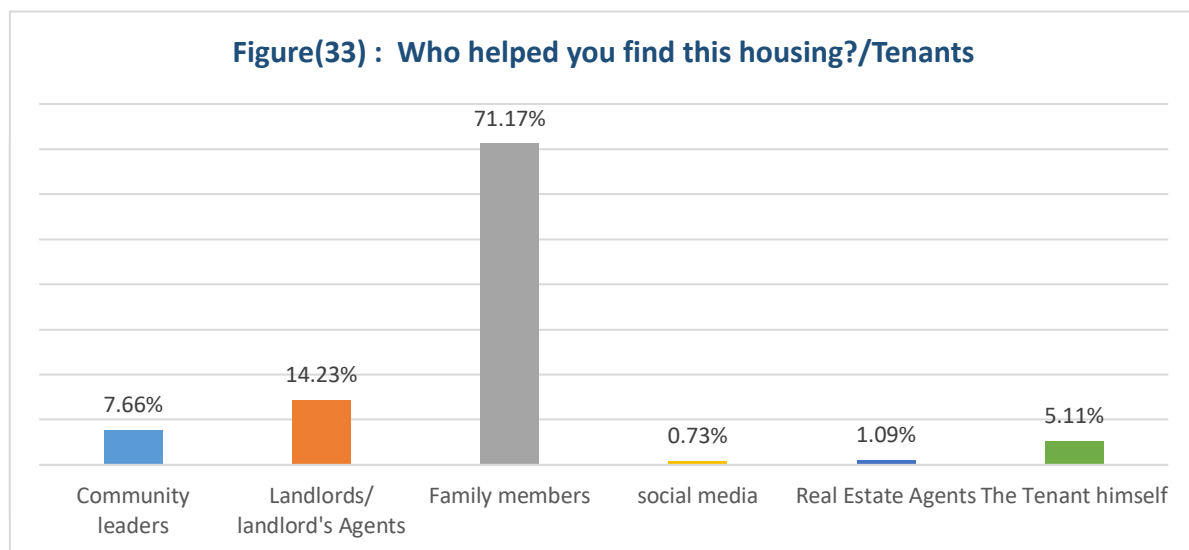
Figure (31) illustrates the period of time it takes tenants to find a rented housing. It took 34.96% of tenants one month, 28.05% more than a month, 23.17% less than a week, and 13.82% more than a month.



The results of the landlords' sample shows how rented housing are being advertised, 62.07% of vacant housing were advertised through friends/relatives, 17.24% through real estate offices/realtors, and 20.69% were advertised by landlords. These results reflect the weak role of real estate offices in the Governorate, Figure (32).

3.4 Key Actors in the Renting Market and Housing Access

Figure (33) shows how the tenants found rented housing. 71.17% through friends and relatives, landlord's/landlords' agents 14.23%, community leaders/ Sheikhs 7.66%, 5.11% of tenants found the housing by themselves, 1.09% real estate agents brokers and realtors, and 0.73% social media. These result confirm the minor role of real estate offices and how tenants rely mostly on friends and family in order to find rented housing.



3.5 Stability in the Housing

Figure (34) shows that 79.67% of tenants decided to settle in their rented housing for the next 12 months is, 16.67% hesitated to answer because of their inability to make any decision (due to war circumstances and financial instability), 3.66% will not continue to live in their current rented housing because of difficulties in accessing basic services, lack of safety in the area, lack of jobs, and high costs of rents, Figure (35).

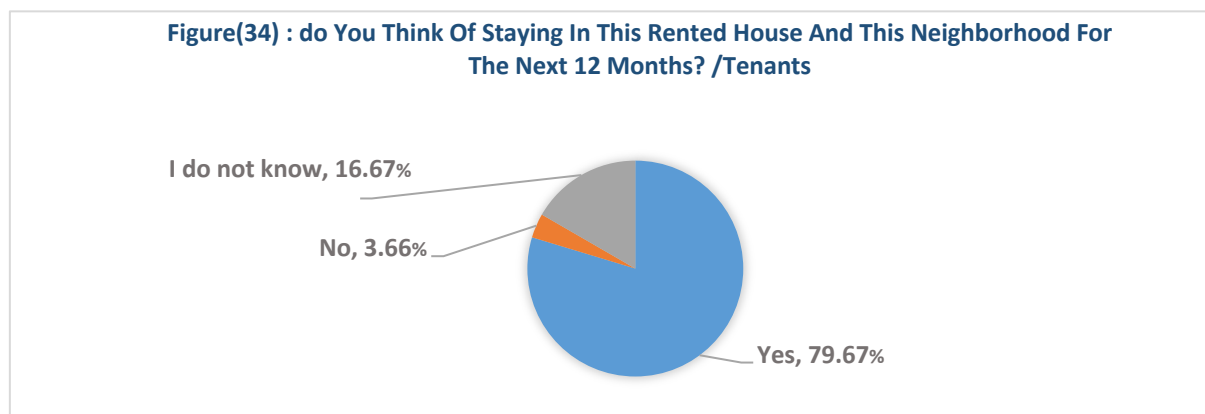
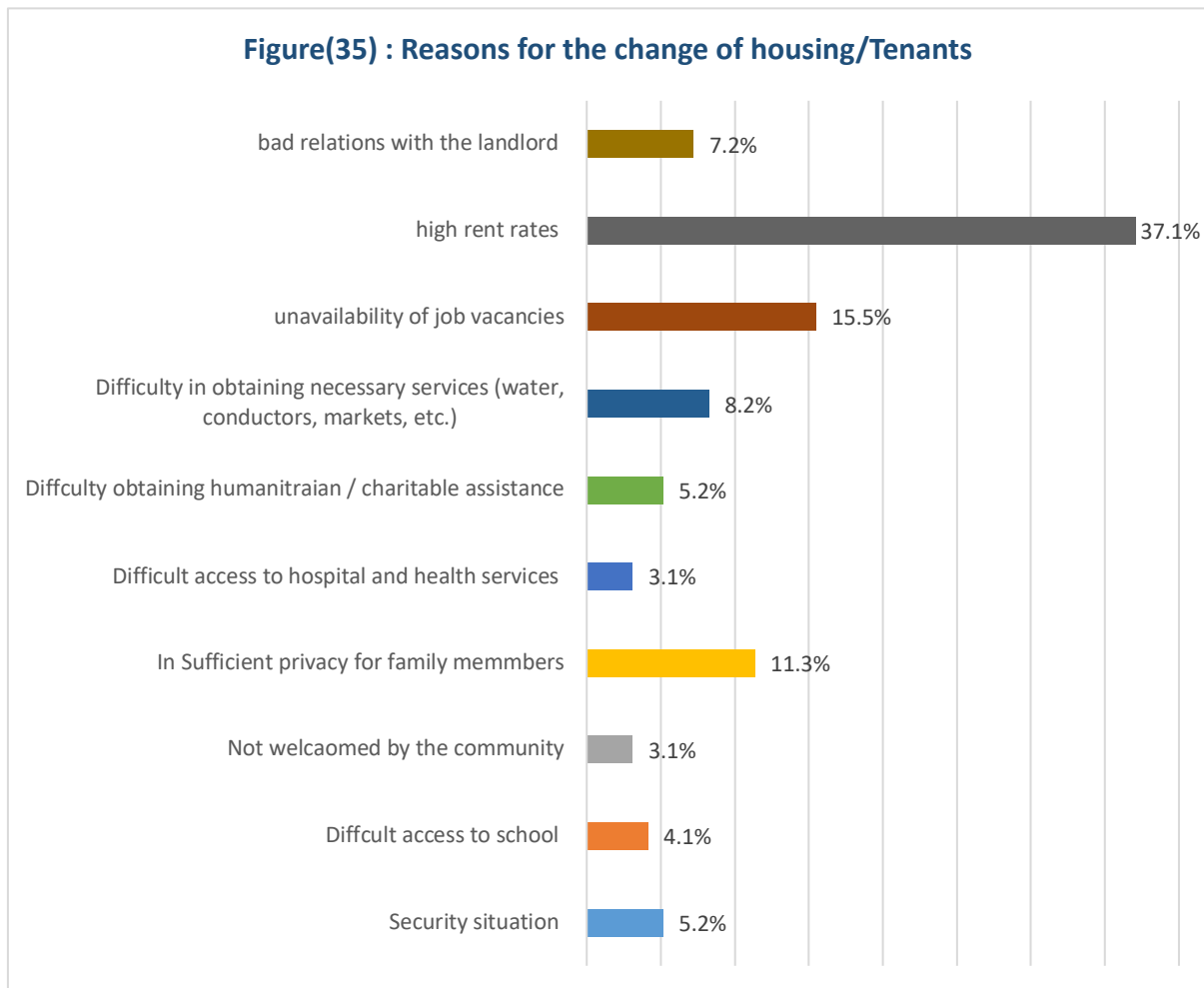


Figure (35) illustrates an additional number of reasons and difficulties such as lack of privacy for families, obstacles in accessing health facilities and schools, poor relationships with landlords, and the large influx of IDPs to the area.



4. Rent and the Main Sectors of the Rental Market

4.1 The Rental Period of the Housing

Results of the tenants' sample analysis as shown in Figure (36) show that 85.37% of the tenants rented the housing for more than six months ago, 5.28% two months, 3.66% three months ago, and 3.25% this month. These percentages reflect the fact that the majority of tenants are former stable residents in the area.



4.2 Renting Agreements

The results of the tenants' data analysis show that 82.11% of the tenants have verbal rental agreements, 16.67% have written agreements but not legalized by the local police, and 1.22% are formal agreement / lawful . This clearly shows that the renting market in Dhamar is not governed by formal agreements, Figure (37).

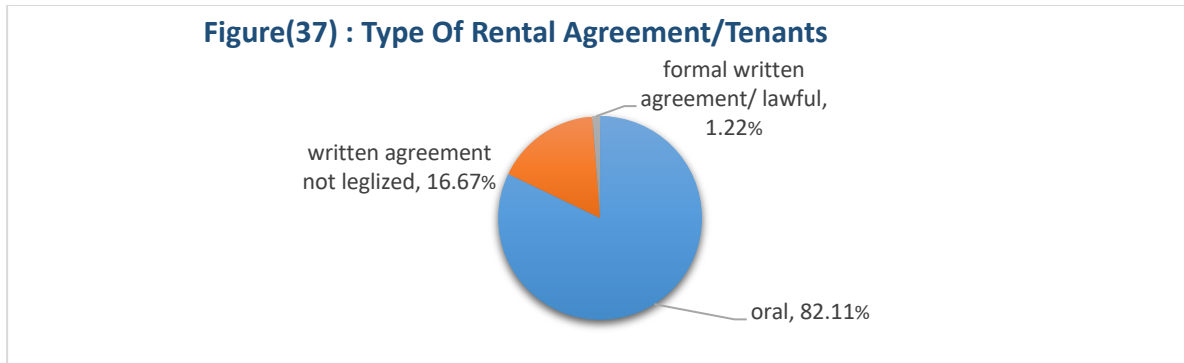
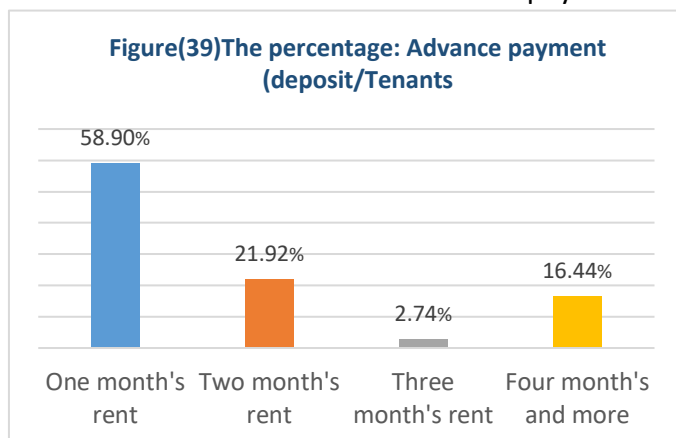
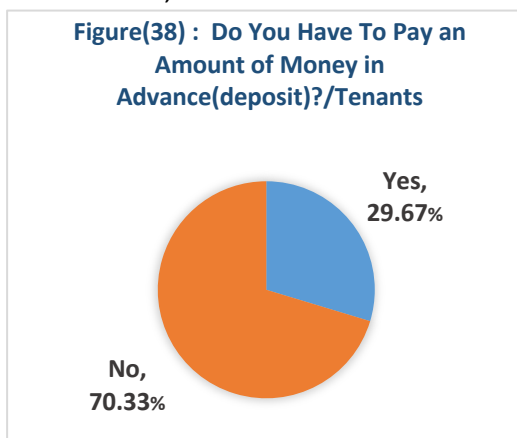
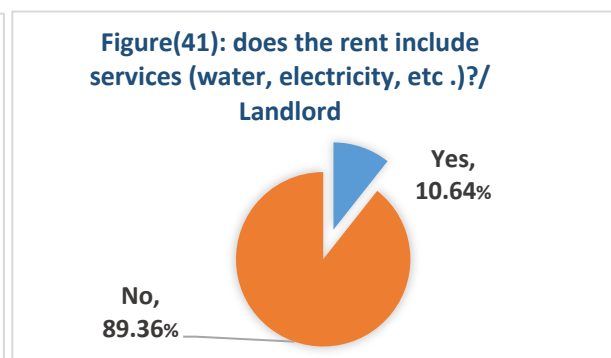
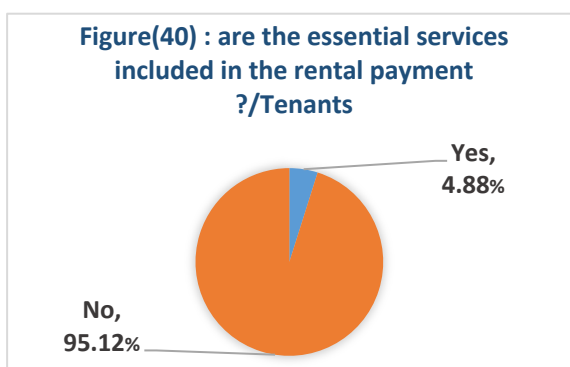


Figure (38) shows that 70.33% of tenants' sample are not obligated to make an advance payment in the rental agreement, whereas 29.67% have to pay a certain amount of money in advance. The details of the advanced payment as shown in Figure (39) are as follows: one month's rent was required by 58.90% of landlords, two months' rent 21.92%, four months' rent 16.44%, and 2.74% of landlords asked for three months' rent as an advance payment.



4.3 Services in the Governorate

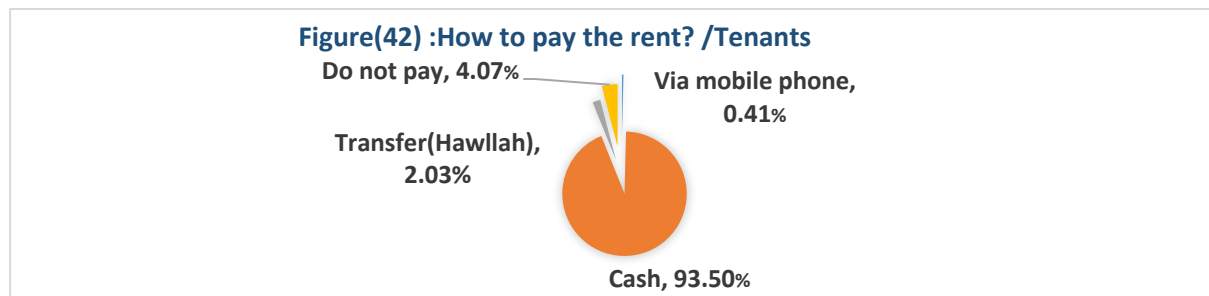
The results of the tenants' sample analysis (Figure 40) also shows that 95.12% of the rental payment does not include any of the basic services such as water or electricity, and that these services are considered separate services and have a separate cost. However, 4.88% of the tenants' sample indicated that the rental payment covers the costs of basic services.



The results of the landlords' analysis clearly show that 89.36% of landlords do not include any basic services such as water and electricity when renting housing to tenants, and 10.64% do include these services, but only to shared housing (Figure.41).

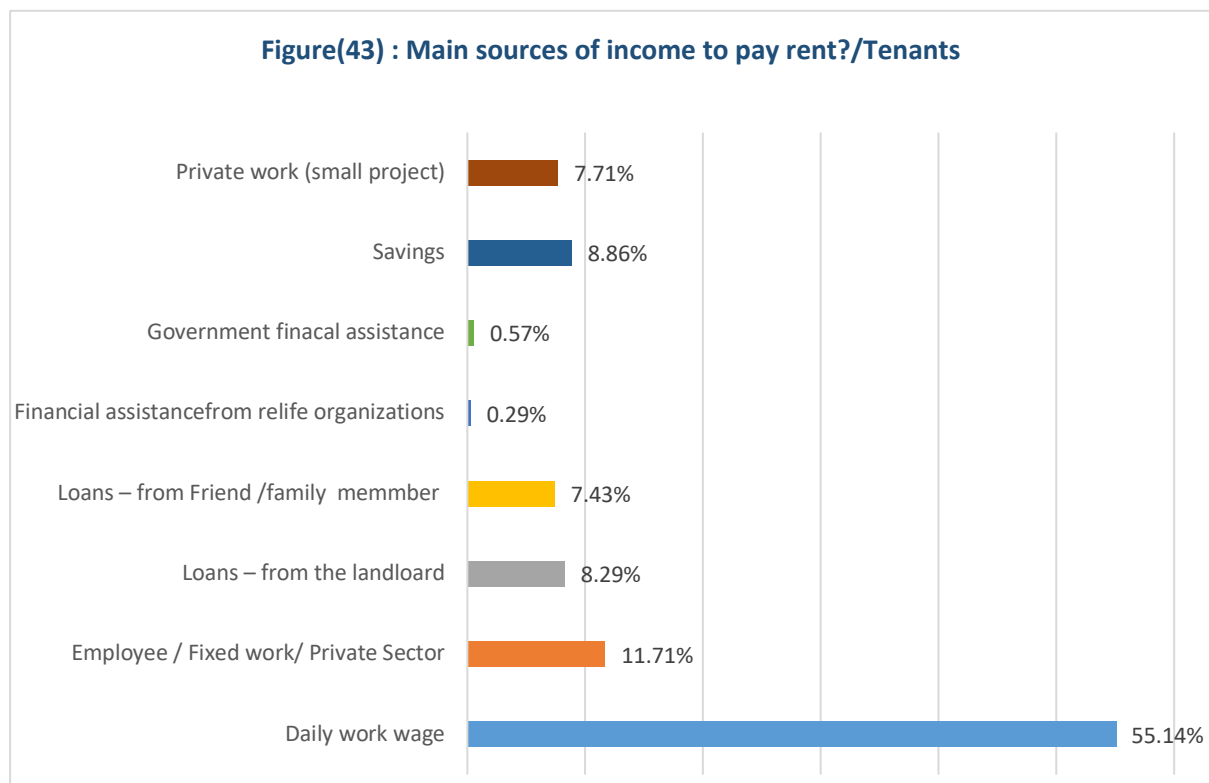
4.4 Rent Payment Methods

The results of the study (Figure. 42) reveal that 93.50% of the tenants' sample pay rent in cash, 4.07% do not pay rent, 2.03% pay rent through money transfers, and 0.41% pay rent using mobile phone. The results of the evaluation of the landlords' sample data confirm that the main method of paying the rent in Dhamar Governorate is cash payment.



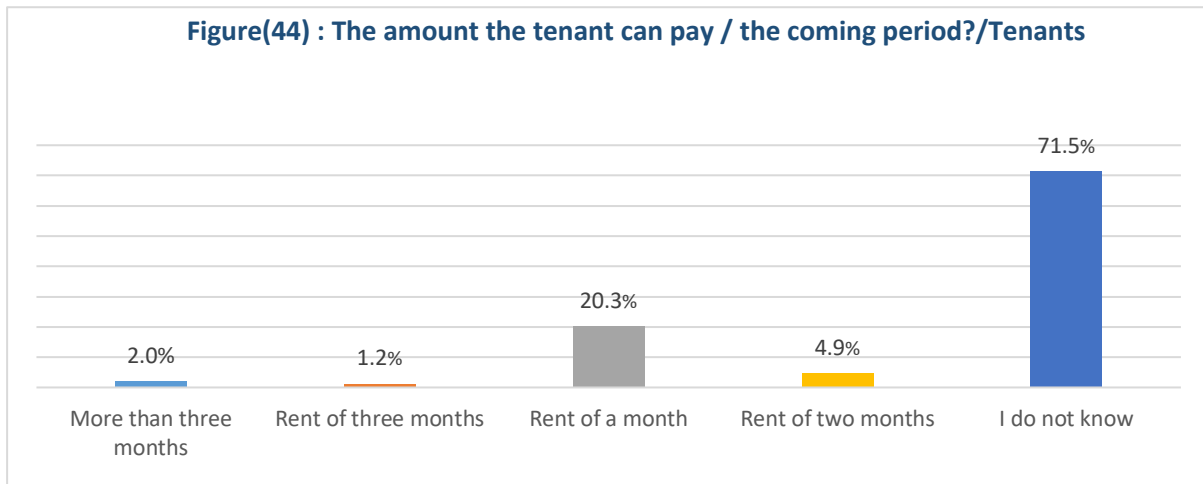
4.5 Source of Income to Pay rent

The study shows that 55.14% of the tenants' sample depend on their daily working labor to pay rent, 11.71% were government employees/fix employment with steady incomes, 8.86% used their savings to pay rent, 8.29% loans from landlords, 7.43% loans from friends/relatives, 0.57% government financial assistance, and 0.29% financial assistance from organizations, (Figure.43).



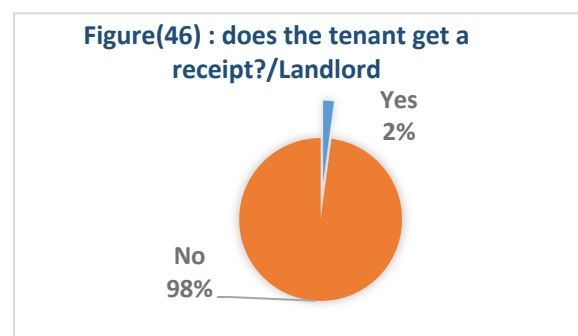
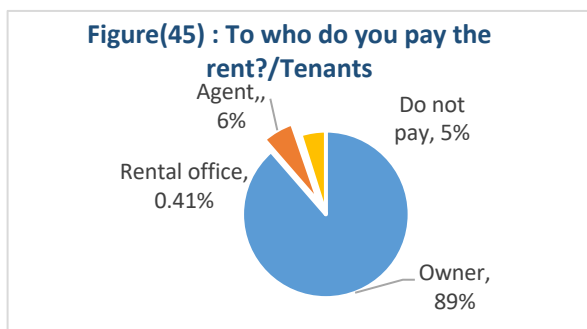
4.6 Paying the Rent

Figure (44) shows the amount of rent that the tenants were able to commit to paying in the next coming months. 71.5% do not know for how long they are able to pay , 20.3% can pay one month's rent, 4.9% next two months, 2% more than three months, and 1.2% next three months.

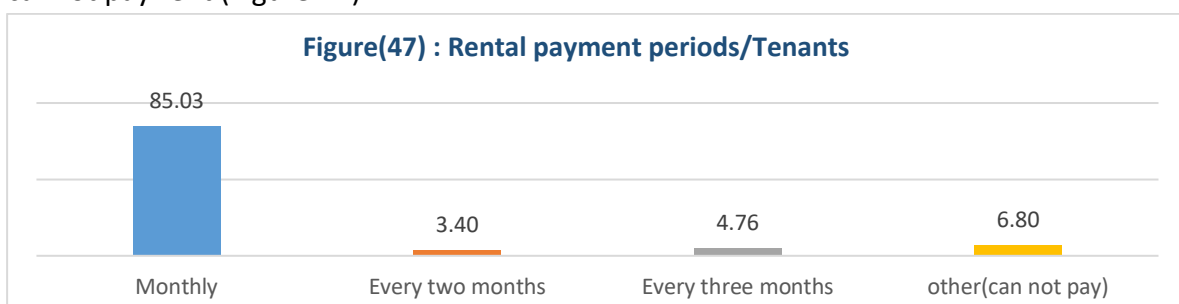


As for the methods of paying the rent, 88.62% of tenants hand the rent money directly to the landlords, 6.10% give rent payment to the landlords' agents, 0.14% hand it to the real estate offices, and 4.88% of tenants work for the landlord in exchange for renting the housing (Figure.45).

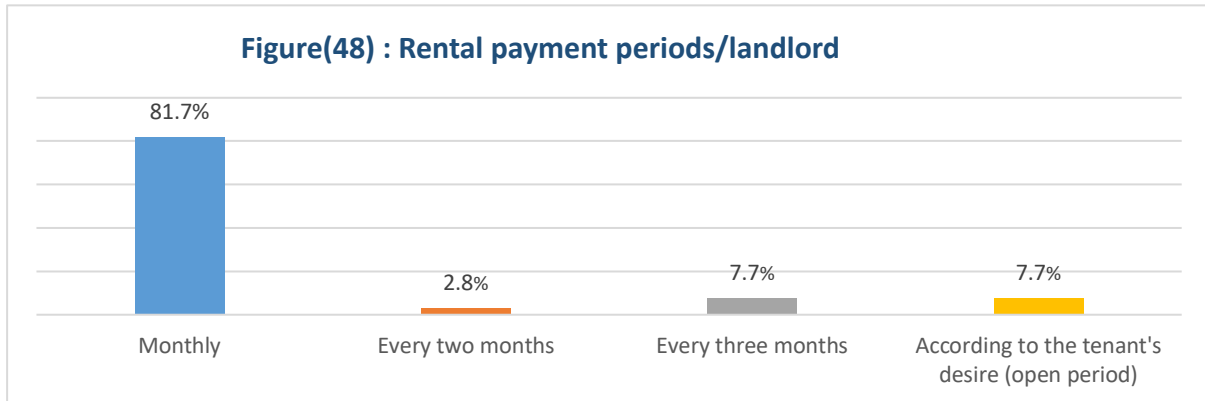
As for getting a receipt for rental payment from the landlords' sample study shows that 2% of landlords give a receipt, whereas 98% of landlords do not give a receipt for rental payment (Figure.46).



The results of the study also state that rental payment dues vary, 85.03% pay on monthly basis, 3.40% every two months, 4.76% every three months, and 6.80% were tenants who cannot pay rent (Figure.47).

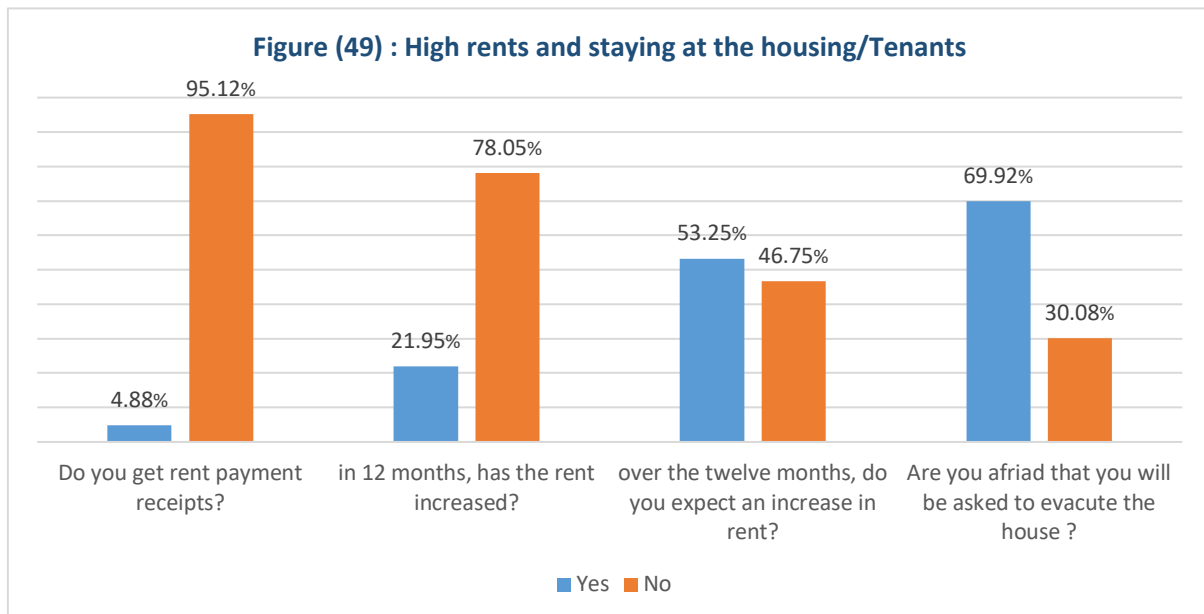


The results of the landlords' sample analysis show that landlords stated that rental payment dues vary. 80.7% of tenants have to pay rent monthly, 7.7% every three months, 7.7% of tenants are given an open period to pay rent according to their financial ability, and 2.8% every two months (Figure.48).



4.7 Rent Increase and Stability

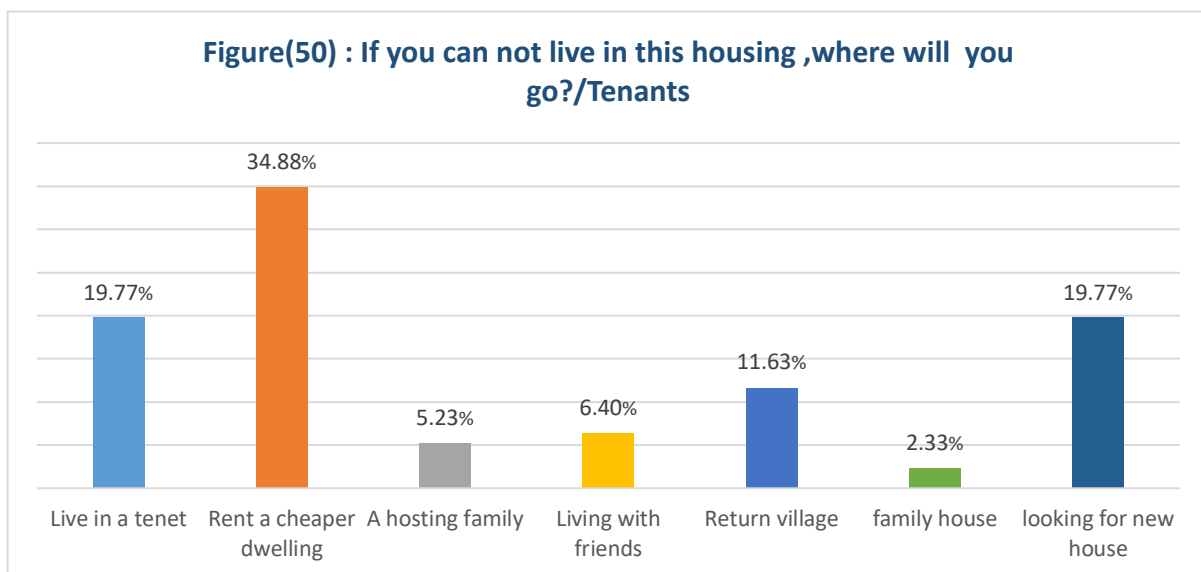
Figure (49) illustrates the results of the tenants' study in regards to the correlation of rent fluctuation and housing' stability. The tenants' analysis also revealed that of all rental payments, 4.88% of tenants got a receipt, whereas 95.12% of tenants did not get a receipt for rent payment.



In regards to increase of rent rates, 53.25% of tenants expected an increase in rent payment in the next twelve months, and 46.75% did not anticipate any raise in the rent payment. 78.05% of tenants stated that there was no increase of rent in the past twelve months, whereas 21.95% said that there was an increase in rent payment in the past year. The study also showed that 69.92% of tenants expressed their worries from the possibility of being evicted from their current rented housing, while 30.08% did not have those fears.

The majority of views of the FGDs both males and females confirmed that IDPs are often evicted from rental housing when they are unable to pay rent regularly. When that happens, the majority of opinions indicated that tenants go to live in public schools, IDPs collective centers, IDPs Hosting Sites, cheaper housing, and will contact humanitarian organizations for help.

Figure (50) illustrates the results of the tenants’ sample analysis in regards to alternatives that tenants are considering in case of unavailability of a rental housing. 34.88% will try to find cheaper and more affordable housing, 19.77% live in tents, 19.77% start looking for new housing to live in, 11.63% likely return to their hometowns / village, 6.40% stay with friends, 5.23% stay with a hosting family, and 2.33% return to their family housing.



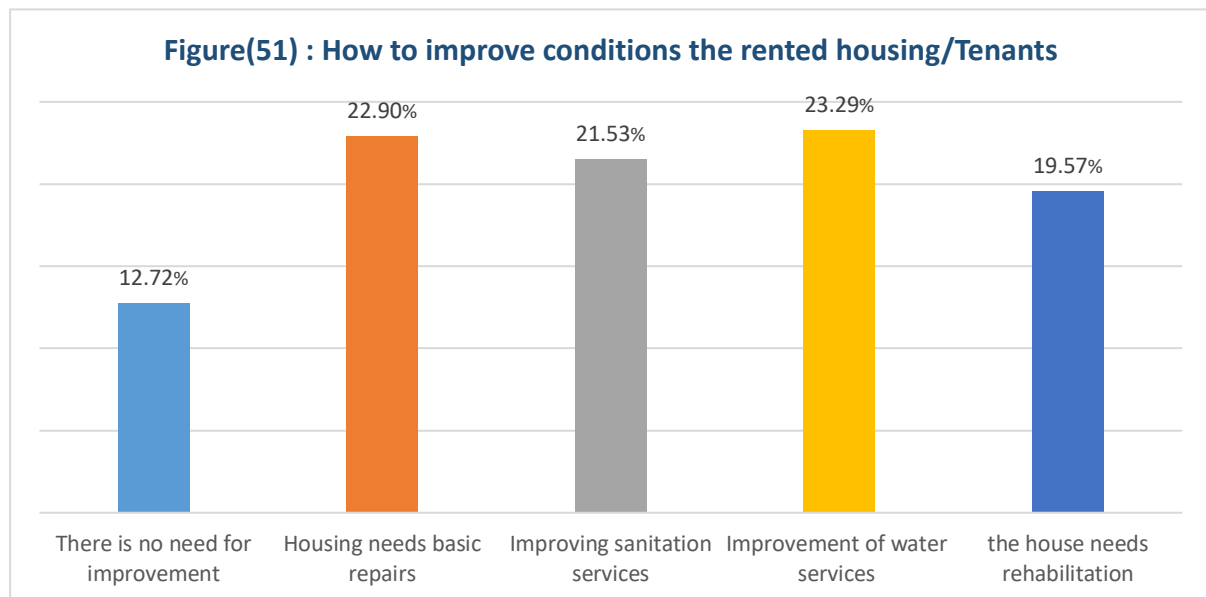
4.8 Total of Income of Tenants and their families

The results of the tenants’ sample analysis show that the collective income of partners (working members in the housing) of a housing averages at 35,503 YER/month. As previously mentioned, the average rent in this area is (35,068 YER) in addition to costs of basic services at (4,646 YER) which means more than half of the income goes to rent and basic services. The rest of the income is a very low number to sustain a good living, which reflects the extent of the humanitarian and economic crisis that tenants are enduring, especially IDPs which are 59.8% of the tenants’ sample as shown in figure(5).

5 Housing Improvement and Accessing Assistance

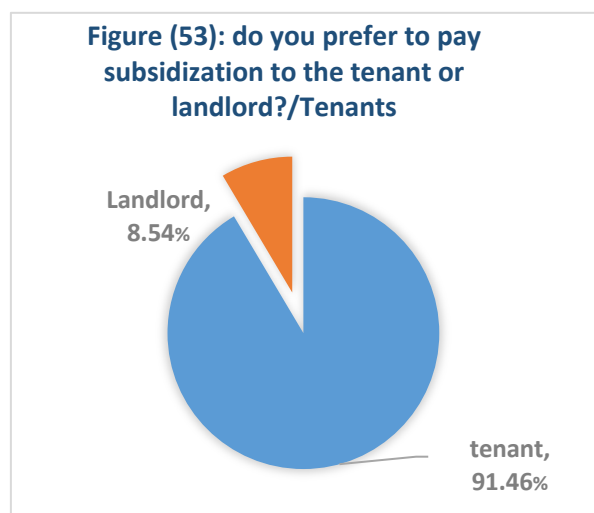
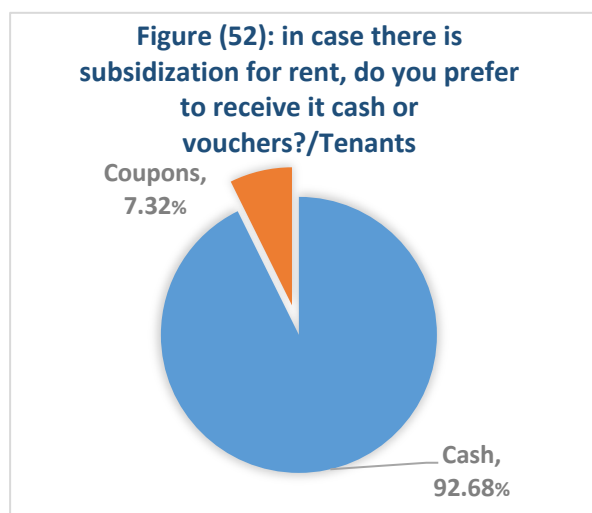
5.1 Housing Improvement

Figure (51) shows that 23.29% of tenants said that improvement of water services is their priority, 22.90% housing need basic repairs to become suitable for living, 21.53% required improvement in sanitation services, 19.57% housing needs considerable repairs and renovations, and 12.72% no need for improvement.



5.2 Accessing Assistance

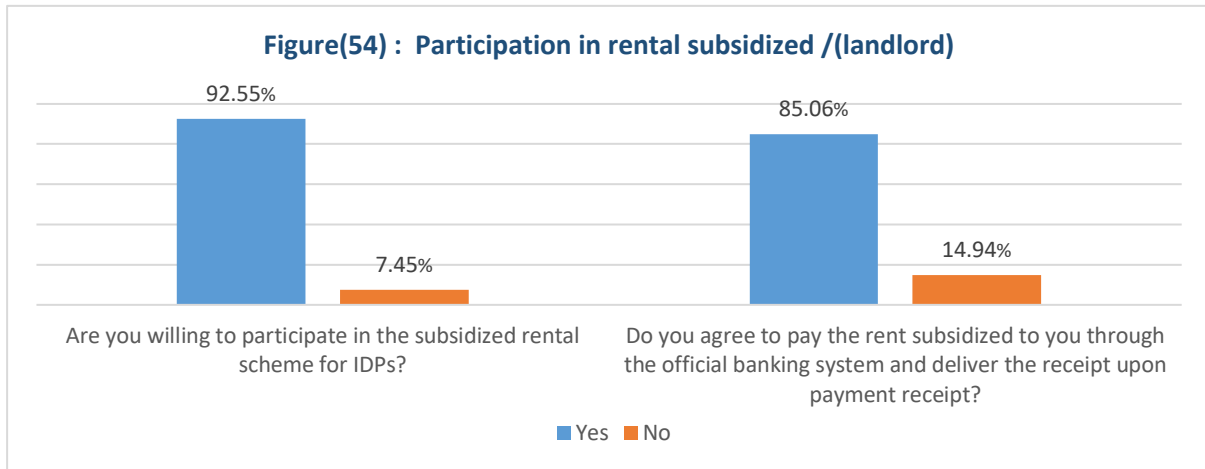
The results of the analysis of the tenants' sample figure (52) shows that 92.68% of tenants prefer to receive rental assistance if available cash, and 7.32% of the tenants said through vouchers. Figure (53) shows that 8.54% of the tenants prefer rents to be paid directly to landlords, whereas 91.46% of tenants preferred it to be paid to the tenants.



6. Taking Advantage and Participating in Support Programs:

6.1 Showing Property Documents:

The result of the analysis of the landlord's sample show that 100% of landlords are willing to show ownership documents of the housing.



6.2 Method of Receiving Rental Funds

As for methods of receiving rental funds, 85.06% of landlords are willing to receive the rent through the banking system and provide a delivery receipt, whereas 14.94% are not willing to do so (Figure.54).

6.3 Preparing for Participation

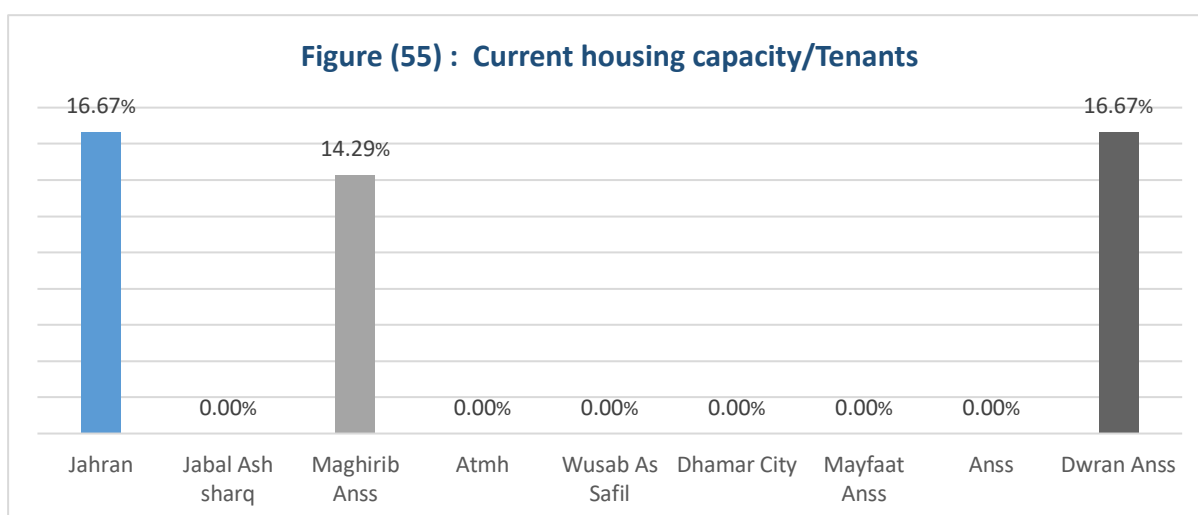
In regards to participation in a rental assistance program, results show that 92.55% of landlords are willing to participate in any future rental support program for IDPs, and 7.45% are not willing to participate (Figure.54).

Section 2: Host Community Capacity Assessment

The following section will show the Governorate’s capacity to host additional IDPs in the targeted district and determine the market value on a district level, as well as the community’s willingness to host IDPs.

1. Rental Housing Capacity and Rent Value

The analysis shows that the housing capacity in the Governorate of Dhamar is quite limited. The landlords’ sample in Dhamar stated that 94.41% of rental housing are occupied, while 5.59% were vacant. The assessment shows that the housing capacity in the urban districts and the districts that are near the Governorates of Taiz and Al-Hudaydah is nonexistent. Figure (55) shows the districts’ current rental housing capacity as follows: Jahran 16.67%, Dwran Anss 16.67%, and Maghirib Anss 14.29%, while the other districts have no capacity at all. For more details check the housing capacity table in annex (6).



The analysis of the data of the sample shows that the housing rent in the Governorate of Dhamar is approximately 14,563 YER per month on average, which is a reasonable amount when compared to the quality and size of the rented housing. The study also shows that a tenant pays an additional 4,646 YER on average for basic services, this number is subject to market prices fluctuation, especially water and fuel.

2. Community Hosting IDPs

The analysis reveals that the community of Dhamar Governorate has shown acceptance to welcome IDPs. As noted earlier, 59.8% of the tenants’ sample are IDPs from Al Hudaydah, Taiz, Sana’a and other Governorates (Figure. 3). Based on the results of this assessment, 84.15 % of tenants have social relation with the local community members. The acceptance of landlords to rent to 98% of IDPs is an important indicator that there are no limitations or restrictions on renting to IDPs. However, the availability of rental housing seems to be the main issue. One of the participants in the FGD indicated that “the community is totally willing

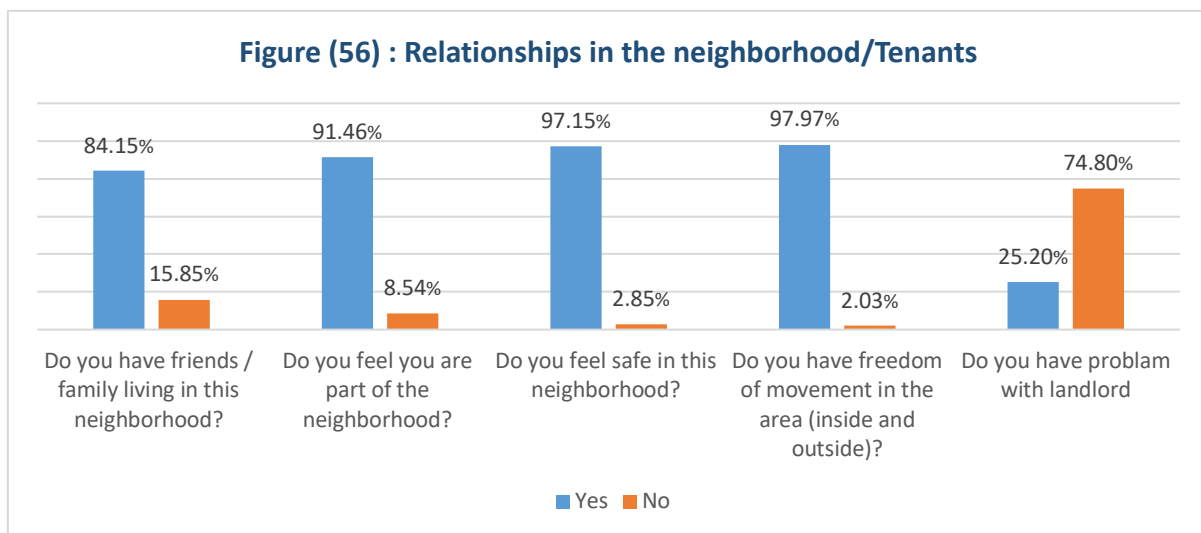
to cooperate with IDPs, but the problem is the lack of rental housing”. However, through the analysis of the KII and the focus group sessions, results show that the rental market prices have increased and the availability of housing has decreased though there is a high demand for rental housing.

The results of the study show that IDPs women mainly fear of being exploited or their children being exploited since IDPs children work outside their housing.

The assessment reveals that the increasing number of IDPs has created a significant pressure on basic services which resulted in limitations of supply in these services. The study also showed that the education and health sector cannot accommodate this large number of IDPs which resulted in some diseases spreading among IDPs such as malnutrition between children.

3. The Relationships between IDP’s and the Hosting Community

The tenants’ sample analysis study (Figure. 56) shows that 84.15% of tenants have friends and families inhabiting the area where they live, and 15.85% do not have friends or relatives in the same neighborhood. As for being part of the neighborhood, 91.46% of tenants stated that they feel as a member of the community, whereas 8.54% of tenants said that they did not feel that way. The results of the study analysis confirmed that overall, IDPs have good relationships with the local community, nevertheless, this relationship suffers some tension whenever international humanitarian aids arrive to the area and go exclusively to IDPs.

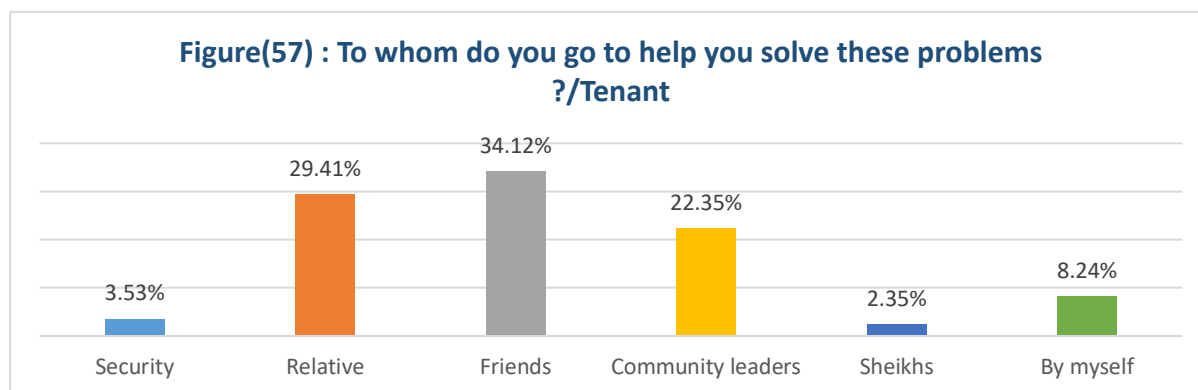


3.1 Feeling Safe and Freedom of Movement in the Neighborhood

The study shows that 97.15% of tenants said that they felt safe in the neighborhood where they live, while 2.85% of the tenants did not feel safe. As for freedom of movement inside and outside the area, 97.97% stated that they had no problems, whereas 2.03% said that they did not have freedom of movement (Figure.56).

3.2 Tenants / IDPs Relationship with Landlords.

In regards to the tenants / IDPs relationship with the landlords, 74.80% did not have any problems with their landlords, while 25.20% reported that they do have issues with their landlords (Figure 50). As for settling problems with landlords, figure (57) shows that tenants go to: their friends 34.12%, relatives 29.41%, community leaders 22.35%, the police 3.53%, Sheikhs 2.35%, and 8.24% of tenants settle the problems by themselves.



3 Community Based Organizations.

CBOs working in Dhamar Governorate generally falls into the category of human services and development, medical relief, special needs, charity activities, education, and agricultural. For the purpose of this study, the target sample was set to collect data from five active CBOs, in each district, working on humanitarian and development fronts for the last three years. 19 community-based organizations matched the required criteria. The number of CBOs in each district is shown in the summary of assessment table below (full data is presented in -Annex (2).

4 Financial Points (Exchangers and Remittance Agents.)

Data on remittance agent's/ cash points has been collected internally through main money exchangers/remittance agencies. The data gathered on remittance agents in Dhamar Governorate shows the availability of (29) remittance agents/cash point scattered in all districts of the Governorate. The summary of the assessment table shows the number of remittance agents in each district. The full data is attached in - Annex (3).

5 Voucher Based Suppliers

The data collected shows positive indicators on the availability of suppliers for NFI/shelter materials in the Governorate of Dhamar. Full data on NFI/shelter suppliers is attached in - Annex (4). Few districts lack sufficient number of suppliers, therefore, information on substitute suppliers from nearby districts was given.

6 Local Authorities

Data on local authority has been collected internally through KII interviews with main local leaders in each district. The full data about the main local authorities in all 9 districts of Dhamar Governorate is attached in - Annex (5)

7 Conclusion

The study revealed a number of aspects related to the housing rental market in the Governorate of Dhamar, which can be summarized as follows:

- Dhamar Governorate has received a large number of IDPs during the last few years, specifically from Taiz, Al Hudaydah, Al-Bayda, and Sana'a. The percentage of IDPs among the tenants' sample is 59.8% (Figure 5). The most important reasons that make Dhamar a target area for IDPs to settle in are safety and job opportunities. Moreover, the quantitative and the qualitative analysis for the key informant interviews and the focus groups stated that the IDPs' movement is associated with social backgrounds as 84.1% of the tenants' sample have friends and family members in the local community.
- The analysis indicates that the majority of the tenants households' members in the target districts fall into two categories: 37.71% of which are over 18 years to 55 years, and 40.15% over 5 years to 18 years (Table 1).
- The assessment reveals that the majority of tenants live in flats 48.87% and in independent housing 44.72% which are the main types of rental housing in the Governorate.
- The analysis shows that around 53.25% of the tenants live in small to medium housing (1-2 rooms), whereas the remaining percentage of the sample (46.75%) live in relatively large housing (3-4 rooms). Areas that need to be taken into consideration are: meeting the minimum standards of area allocated for each individual in a housing, privacy for women and children, good sanitation and access to safe drinking water.
- The assessment shows that 62.07% of tenants found rental housing with the assistance of friend and family members. 17.24% of housing were rented through real estate agents, reflecting that they have a somewhat active role in advertising rental housing. The community leaders play a notable role in the rental housing market. The local authority's role seems to be active in IDPs' housing as it coordinates with humanitarian agencies.
- The results of the study show that the housing capacity in the Governorate of Dhamar is quite limited, based on the landlords' sample covered in this study. The current housing capacity is estimated at 5.60% which represents the vacant housing out of the total percentage of housing managed by the landlords/agents that have been covered in this study. The high demand on the rental housing market is a result of the influx of

IDPs from the nearby Governorates including Taiz, and Al-Hudaydah. As long as conflicts are ongoing, the pressure on the housing market will increase.

- The qualitative analysis of the data from the focus groups and the key informants reveals that the community gives the priority of hosting to IDPs who have relatives in the target community and IDPs who are part of the same region/area/ district (or may be part of the tribe). The key informants suggested hosting IDPs in public facilities (e.g. schools and public health units), and in IDPs' collective centers.
- The analysis shows that the average housing rent in Dhamar Governorate is 14,563 YER, and the average fees for services is 4,646 YER/month. Tenants are expecting rent increase during the next coming 12 months. The increase is estimated at 53.23%. However, the participants of the FGD expected an increase in rent that ranged between 30-100%.
- The assessment shows that 91.46% of tenants felt a sense of belonging to the neighborhoods and feel like members of the community, and 97.15% of the tenants feel safe in the neighborhoods where they live.
- The result of the analysis of the landlord's sample show that 92.55% of landlords are willing to participate in any future rental support program for IDPs, 100% of landlords are willing to show ownership documents of the housing, and 85.06% of landlords are willing to receive the rent through the banking system and provide a delivery receipt.

Summary of Assessment

District	Number of presence CBOs	Supplier				Financial Points	Average Rent Rate
		household items	Furniture	Cloths	Shelter materials		
Anss	6	5	3	6	6	2	19560
Atmh	1	9	6	6	6	1	17240
Dhamar City	6	6	6	3	5	9	12178
Dwran Ans	3	5	4	4	7	2	8121
Jabal Ash sharq	1	3	6	5	6	2	15480
Jahran	0	6	5	5	5	2	18980
Maghirib Ans	0	7	4	9	5	5	22310
Mayfaat Anss	2	6	1	6	7	1	19916
Wusab As Safil	0	6	3	7	6	5	12440

Annexes:

Annex (1): Assessment Maps

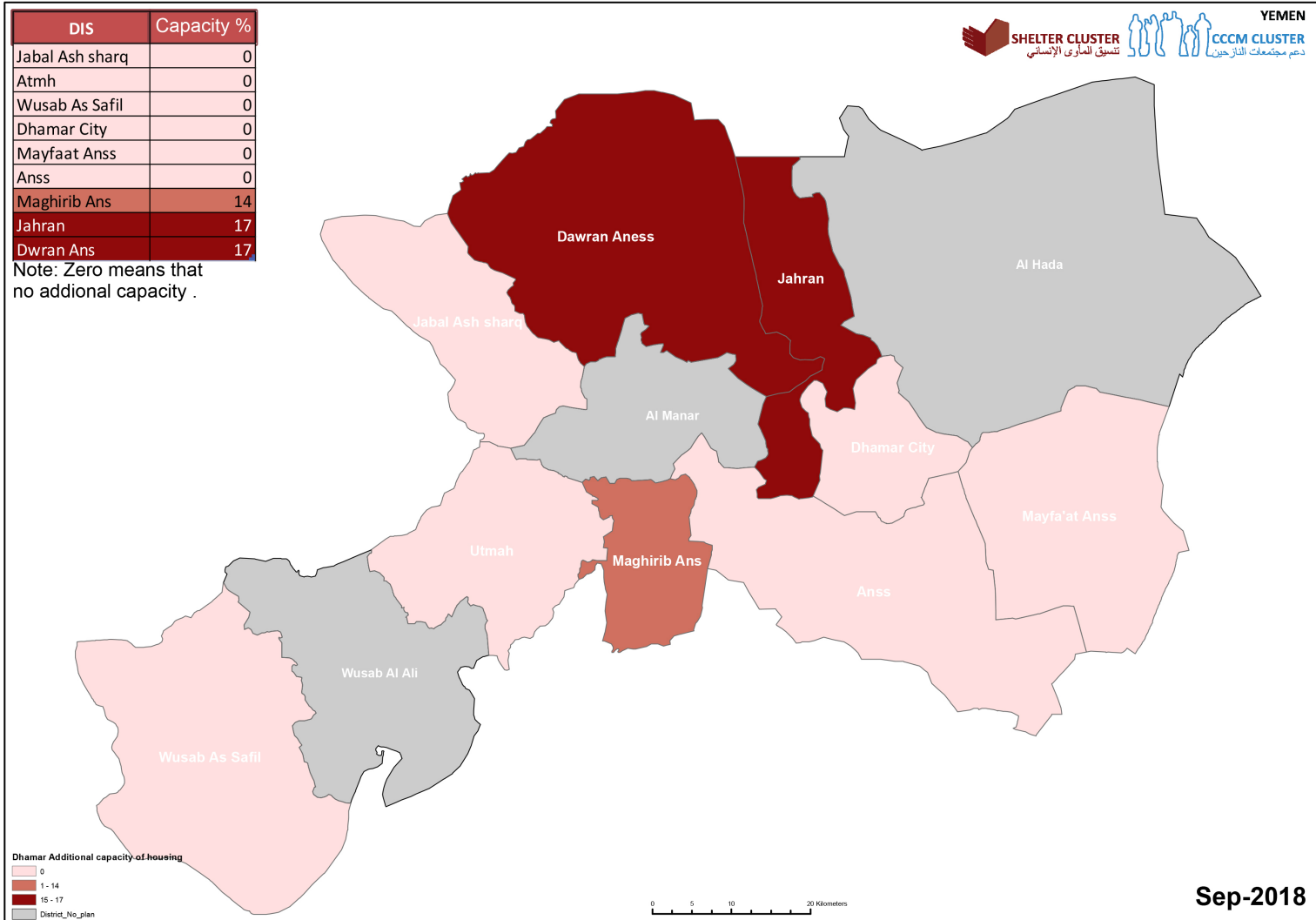
Annex (2): Community Based Organizations

Annex (3): Financial points-Exchangers and remittance agents.

Annex (4): voucher Based suppliers.

Annex (5): Local Authorities

Annex (6): Housing capacity Map



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Section 1: CBOs

Activities provided by CBOs:

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Development- Relief, 236,240,244
Development, 230, 234-235, 238, 242-243,245-246
Development-charity, 247
Health- development Charity Relief Education, 231-232, 237
Health –Development charity Relief, 241
Relief, 239

Validity of license

Not valid, 230-231, 233, 244
Valid, 232, 234-238, 240-243, 245-248

Bank Accounts

Available: 230-238, 240-246
Not Available: 239, 247-248

Section 2: Exchangers and remittance agents.

Al-Amal Bank

Al-Kuraimi Exchanger

Section 3: Non cash voucher suppliers.

Type of Goods are provided by Vendors:

Cloths, 1700,1704,1708,1710,1721,1731,1733,1744,1745,1747,1751,1752,1756,1757,
1761-1763,1765,1770,1772,1777,1778,1781,1786-1790,1799,1803-1805,1811,1818,
1821,1828,1830,1835,1836,1843,1849,1851,1853,1854,1860,1863,1865,1866,1868,1870,
1872
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1761,1779-1782,1784,1801,1807,1808,1812,1813,1817,1831,1833,1842,1856,1857,1862,
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1823,1826,1827,1829,1837,1840,1841,1847,1848,1850,1852,1854,1858,1862,1864,1871,1
873,1874,1876

Previous experience in voucher program:

Available, 1720,1726,1827,1733,1734,1737,1750,1762,1773,1802,1810,1819,1820,1829,
1841,1846,1847,1853,1856,1858,1874

Not Available, 1696-1719,1721-1825,1728-1732,1735,1836,1738-1749,1751-1761,
1763-1772,1774-1801,1803-1809,1811-1818,1821-1828,1830-1840,1842-1845,1848-1852,
1854,1855,1857,1859-1873,1875,1876

Willingness to respond in emergency:

Willing, 1700,1703,1710,1711,1713-1718,1720-1723,1727-1744,1746-1770,1772,1776,
1777,1783-1795,1799-1821,1823-1825,1828-1833,1835,1838-1876

Not willing, 1696-1699,1701,1702,1704-1709,1712,1719,1724-1726,1745,1771,1773-1775,
1778-1782,1797,1798,1822,1826,1827,1834,1836,1737