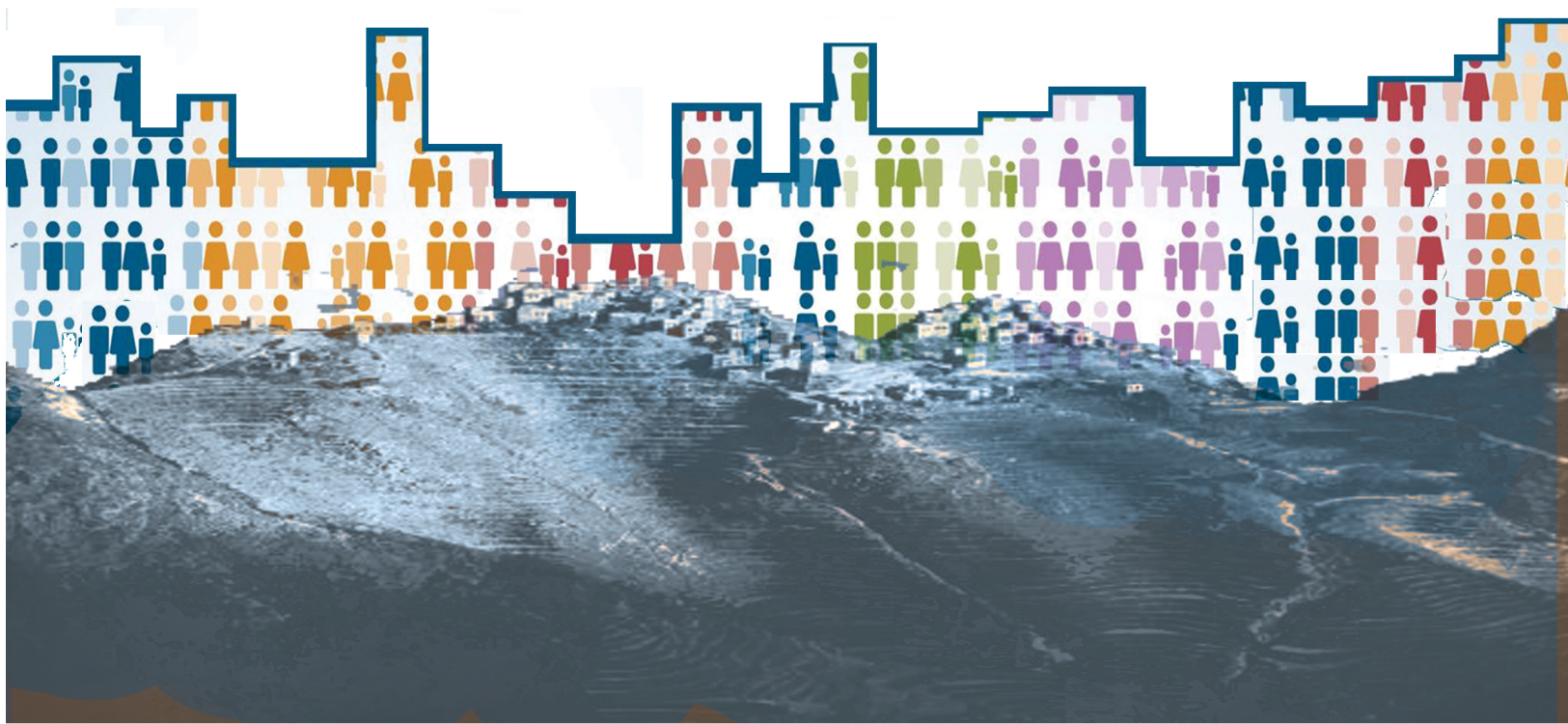


Yemen Shelter/NFI/CCCM Cluster Housing

Rental Market Assessment

September 2018

Sana'a Governorate



SHELTER CLUSTER
تنسيق المأوى الإنساني



YEMEN
CCCM CLUSTER
دعم مجتمعات النازحين



YHF

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The Samples of The assessment



Tenants
269



Landlords
117



KII
37



FGD
20



CBOs
14



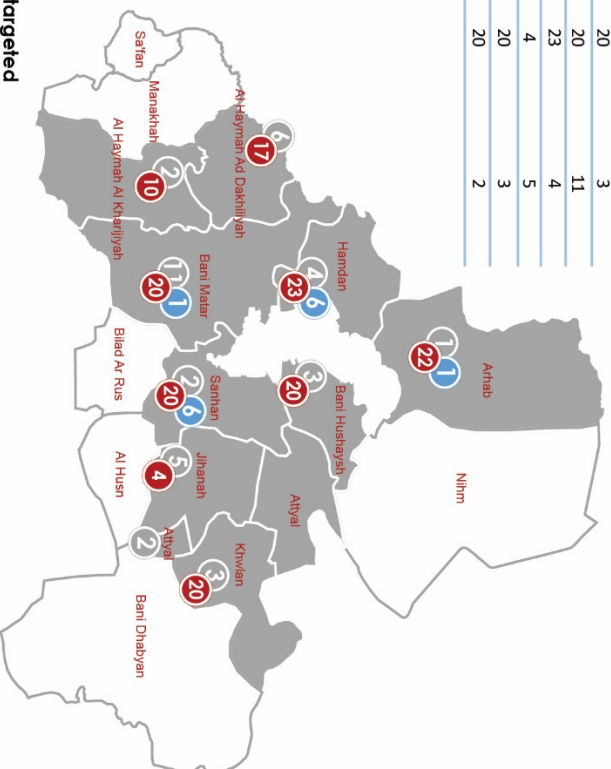
Suppliers
156



Financial Points
39

CBOs, Suppliers, and Financial Points Sample

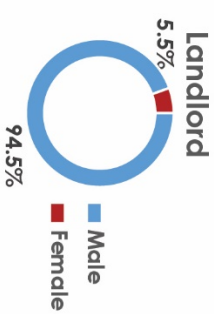
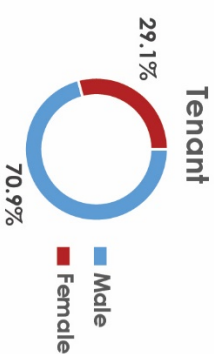
Districts Name	CBOs	Suppliers	Financial Points
Al Haymah Ad Dakhiliyah	0	17	6
Al Haymah Al Kharijyah	0	10	2
Ahbab	1	22	1
Attyal	0	0	2
Bani Hushaysh	0	20	3
Bani Mater	1	20	11
Hamdan	6	23	4
Jihanah	0	4	5
Khwlan	0	20	3
Sanhani	6	20	2



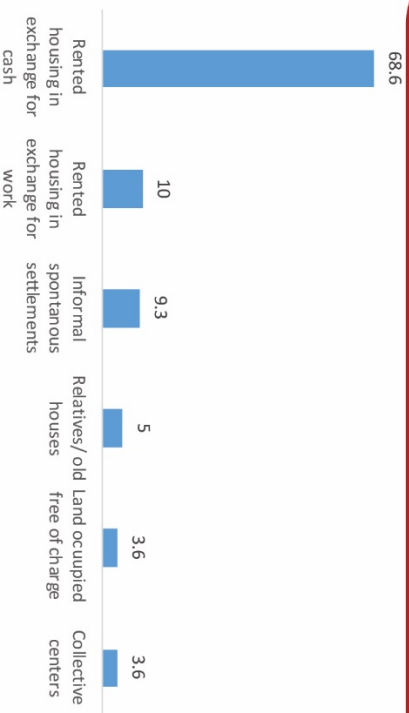
* The other districts are not targeted



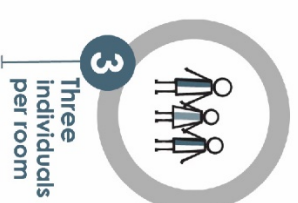
Gender



The Majority of Housing Inhabited by the IDPs



Income and Expenses and The Crowding Index



Introduction

General Information about the Governorate:

Sana'a Governorate covers an area of 15,052km² (5812 sq. mi). Its population, according to the 2004 Yemeni census, "919,215". The number of IDPs in the Governorate has reached (126,024) according to TEPM (Task Force on Population Movement Yemen)| 17th Report - August 2018.

What is the Objective of this Assessment?

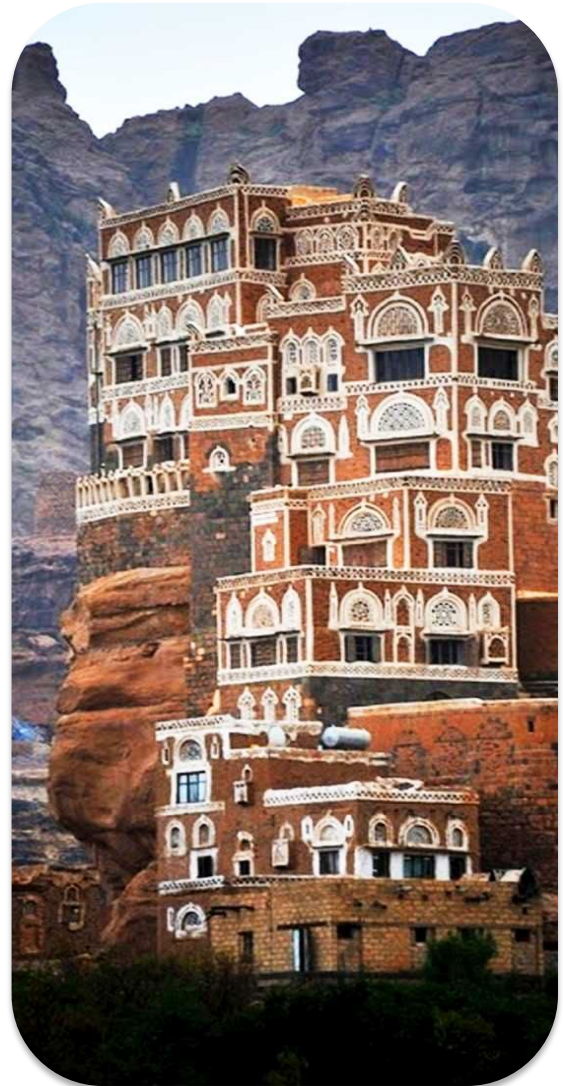
The Preparedness Assessment is guided by a number of objectives. The main objective is to support Clusters' priority preparedness activities through providing an independent preparedness assessment about "Housing Rental Market Assessment and Host Community Capacity Assessment".

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 Sana'a Governorate

The districts distributed among the targeted sample of Sana'a Governorate are 10 : Attyal, Al Haymah Al Kharijiyah, Arhab, Bani Hushaysh, Bani Matar, Hamdan, Khwlan, Jihanah, Sanhan, and Al Haymah Ad Dakhiliyah.

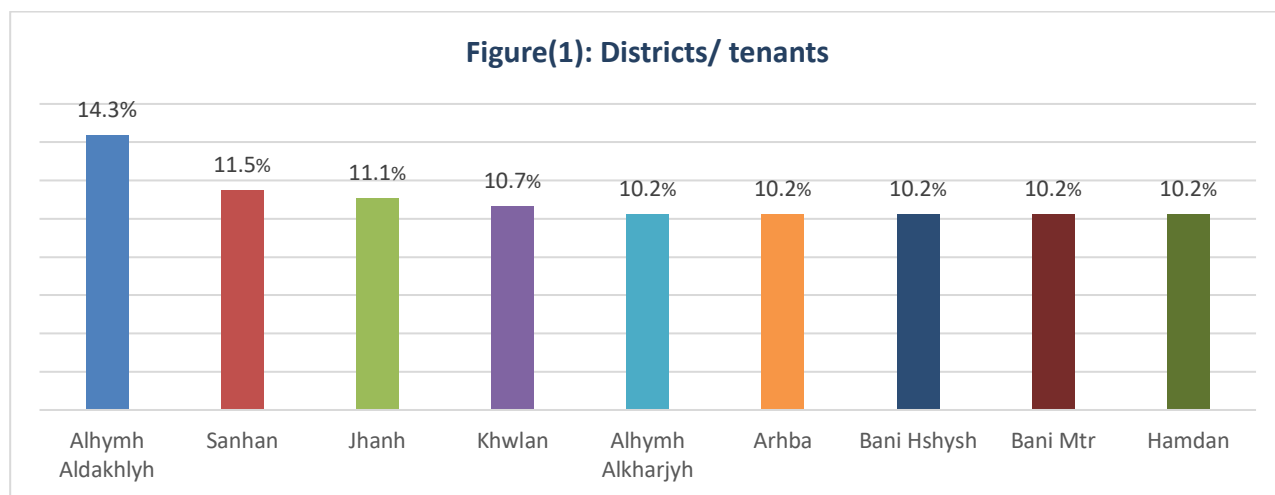


Section 1: Housing Rental Market Assessment

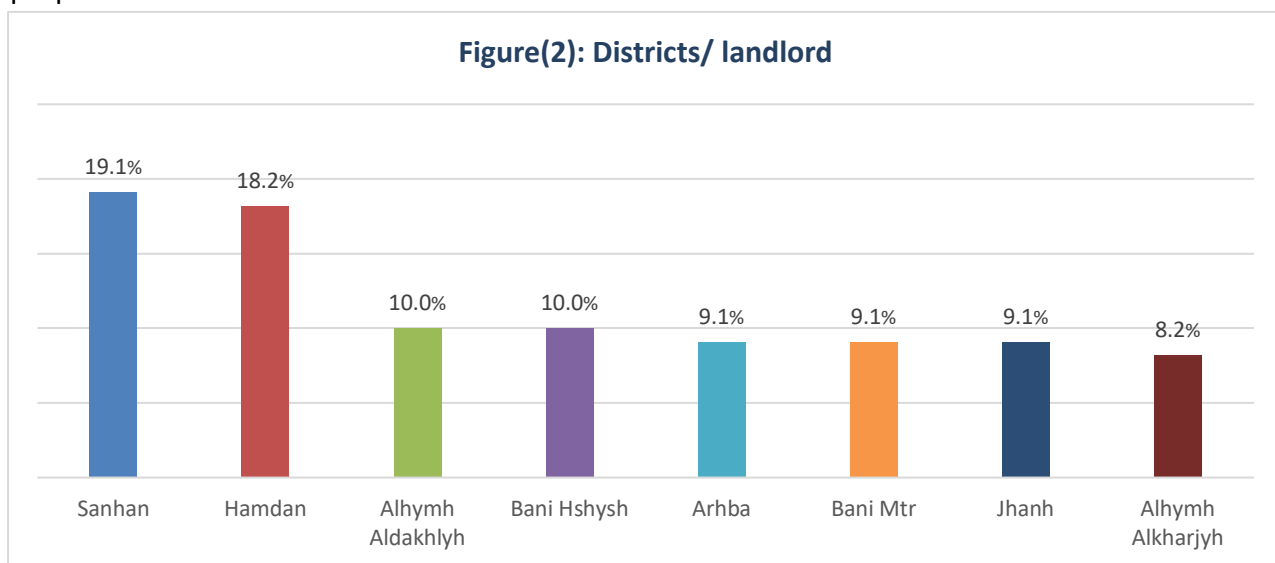
1. Demographic Details

1.1 Targeted Districts

Figure (1) shows the results of the tenants' sample analysis in Sana'a Governorate, the districts were distributed as follows: Al-Haimah Ad-Dakheleyah 14.3%, Sanhan 11.5%, Khawlan 10.7%, Bani Hshysh 10.2%, Jhanh 11.1%, Al-Haimah Al-Kharejeyah 10.2%, Bani Matar 10.2%, Hamdan 10.2%, Arhab 10.2%, and At-Teyal.

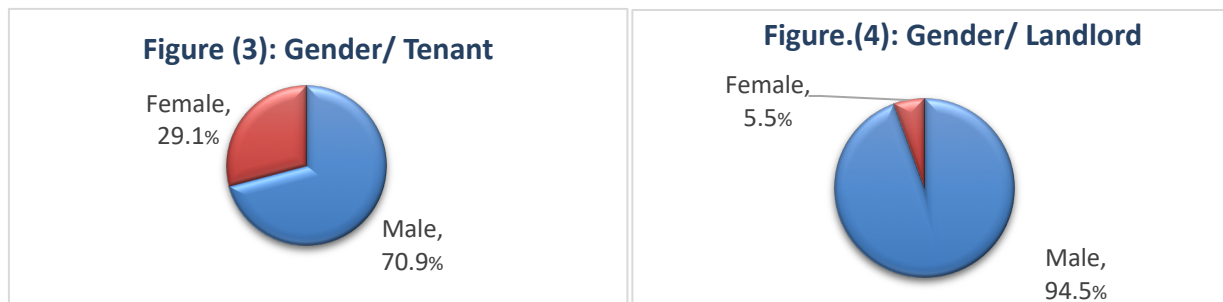


In the same context, the distribution of the landlords among the nine districts is shown in Figure (2). The study shows that the sample was not completed in the districts less than 10% due to the scarcity of tenants / landlords of rented housing (which is because of the lack of real estate properties in those areas).



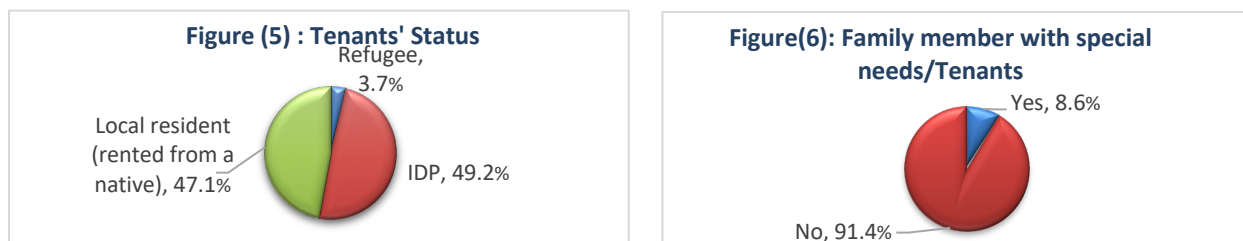
1.2 Gender (Landlords / Tenants)

Figure (3) shows the gender distribution of tenants which was 70.9% males and 29.1% females. As for the landlords gender distribution, 94.5% male landlords and 5.5% female landlords (Figure 4).



1.3 Tenant Characteristics

Figure (5) shows that 49.2% of the tenants' sample were IDPs, 47.1% were local residents of the same area, and 3.7% were refugees. This result reflects the large presence of IDPs in this area. As for family members with special needs, 8.6 % of the tenants' sample have members with special needs, whereas 91.4% do not have (Figure 6) .



1.4 Household Age Category (Tenants)

The analysis (Table 1) illustrates the tenants' age category in the target districts. The age categories of tenants are: 41.27% over 18 years to 55 years, and 36.45% over 5 years to 18 years, 17.34% less than 5 years old, and 5% of family members over 55 years. And according to the results of the analysis, the gender of the tenants is 53.56% males and 46.44% females. These results reveal the magnitude of suffering endured by the greater part of the household which are women and children, especially for IDPs.

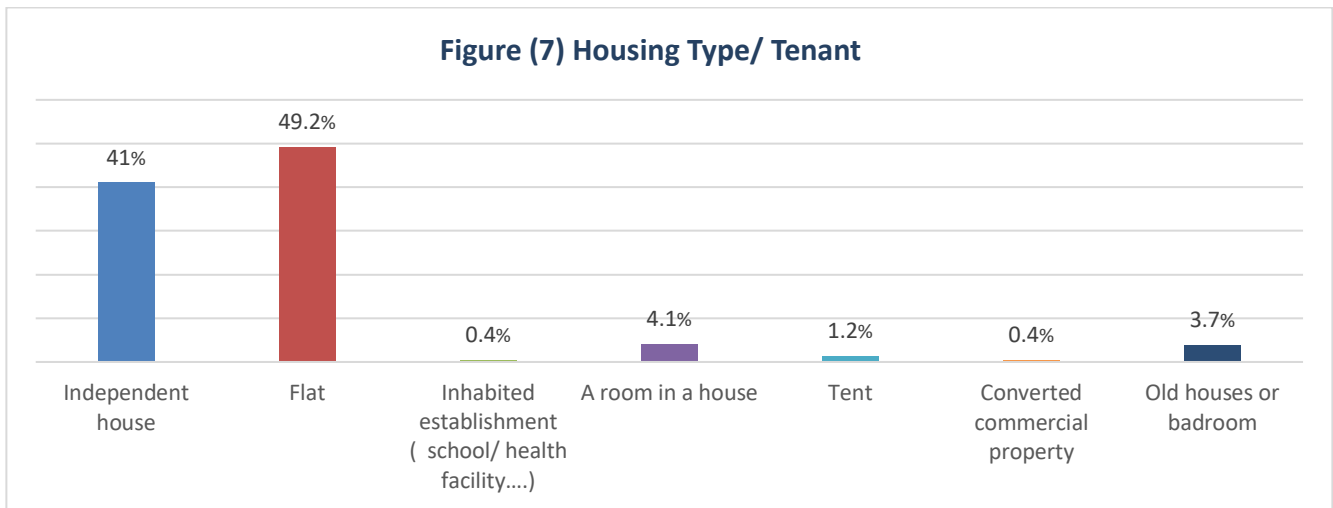
Table (1): Age and Gender of the Tenant Family Members

Gender	under 5 years		from 5 to 18 years		More 18 – 55 years		Older than 55 years		Total of numbers in the household	
	number	%	number	%	number	%	number	%	number	%
Male	147	49.83	333	53.71	384	54.70	47	55.95	911	53.56
Female	148	50.17	287	46.29	318	45.30	37	44.05	790	46.44
Within Age%	295	100	620	100	702	100	84	100	1701	100
	17.34		36.45		41.27		4.94			

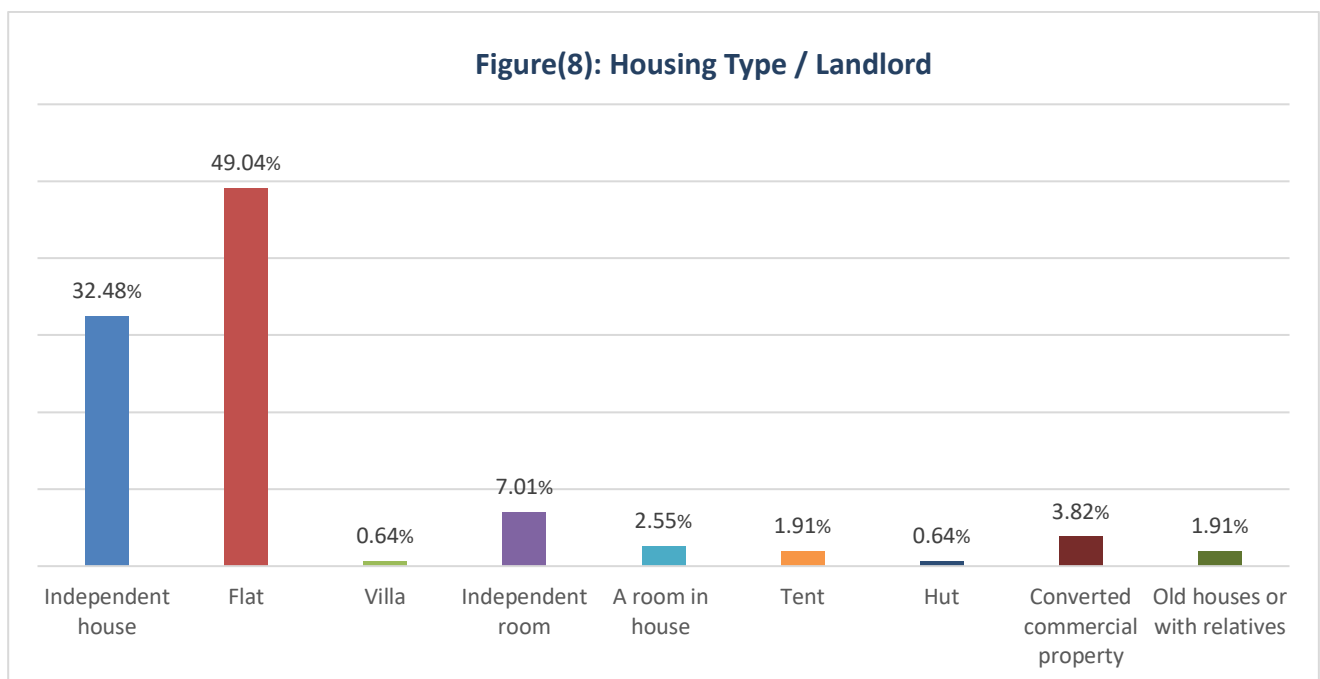
2. Details of the Rented Housing:

2.1 Type of Housing (Tenants / Landlords)

The results of the tenants' sample analysis show that housing available for rent in the Governorate of Sana'a (within the targeted districts) are as follows: independent housing 41%, flats 49.2%, a room in a housing 4.1%, old housing 3.7%, tents 1.2%, converted commercial property 0.4%, and school/health facilities (rent free) Figure (7).



In the same context, the results of the landlords' analysis show that housing available for rent were as follows: 49.04% flats, 32.48% independent housing, 7.01% independent room in a shared housing, and 1.91% old housing or living with relatives Figure (8).



2.2 Renting to IDPs

The results of the landlords' sample analysis indicated that 46.4% of the landlord's sample have already rented housing to IDPs, whereas 53.6% have not. However, study shows that 100% of landlords are willing to rent their housing to IDPs, which reflects that there are no discriminations against IDPs, (Figure 9).

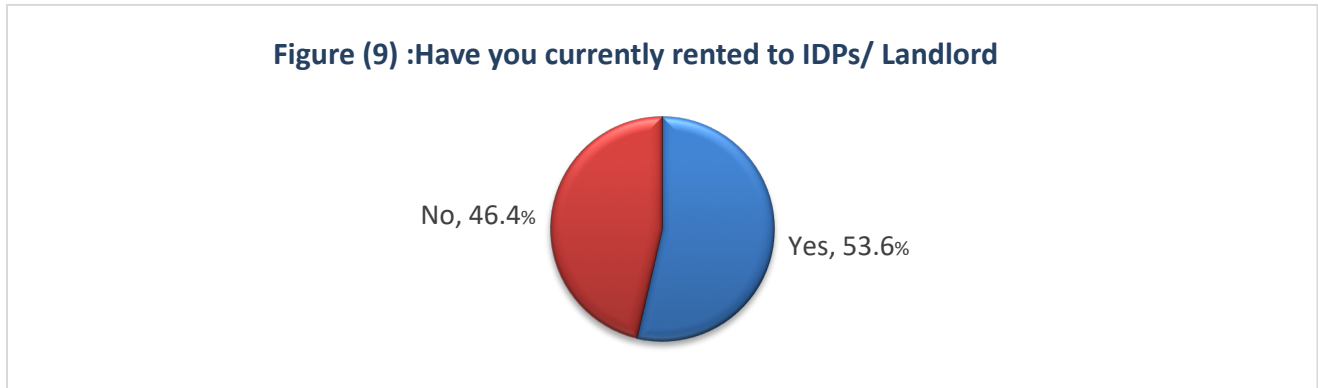
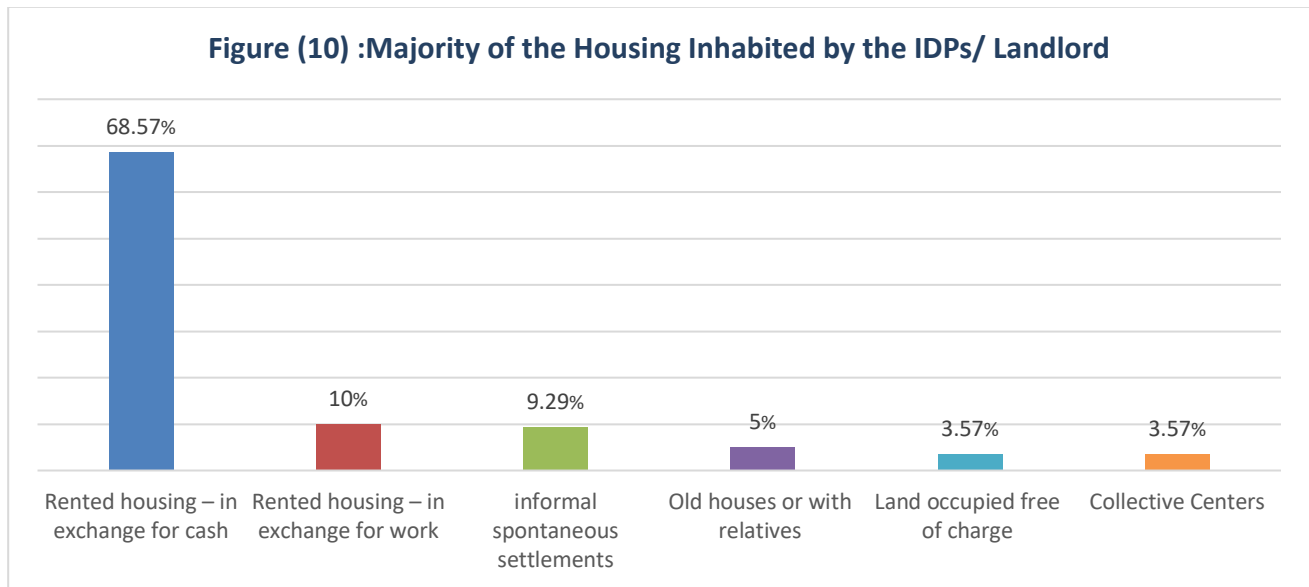


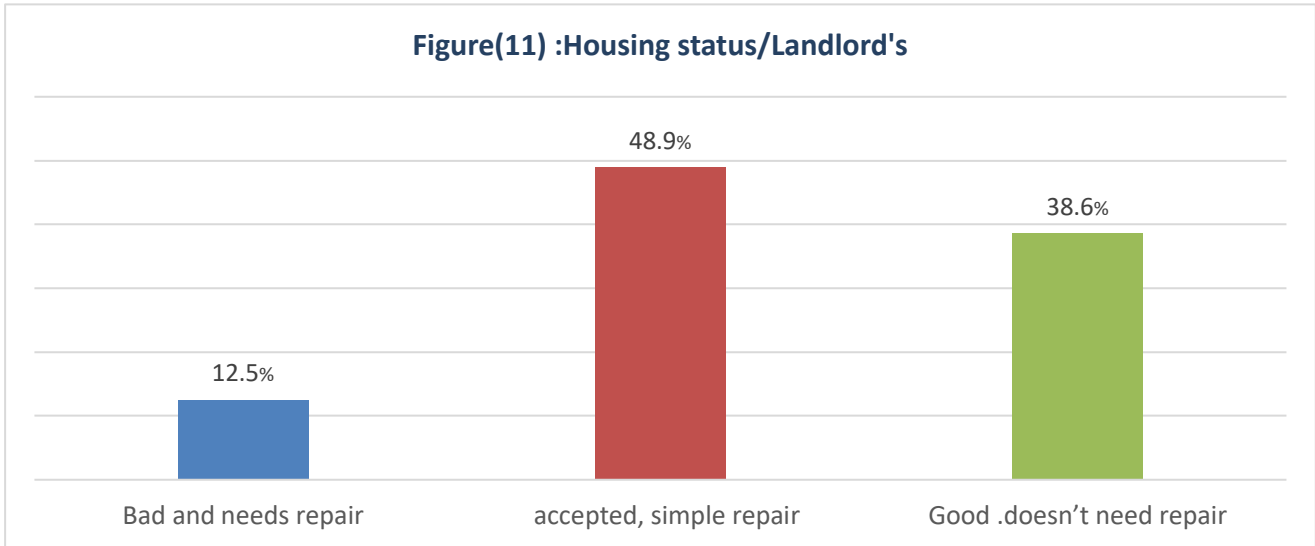
Figure (10) illustrates the types of housing tenants/IDPs rented: 68.57% rented housing for cash, 10% in exchange for work (working for the landlord instead of paying rent), 8.57% informal spontaneous settlements, 5% old housing/with relatives, 3.57% collective centers, 3.57% land occupied free of charge, and 0.72% of IDPs lived in Hosting Sites.



The results of the analysis of the FGDs and KII confirm that the majority of rented housing IN THE Governorate of Sana'a are flats and independent housing, the results also indicated that many landlords have repaired their old vacant housing for tenants to rent.

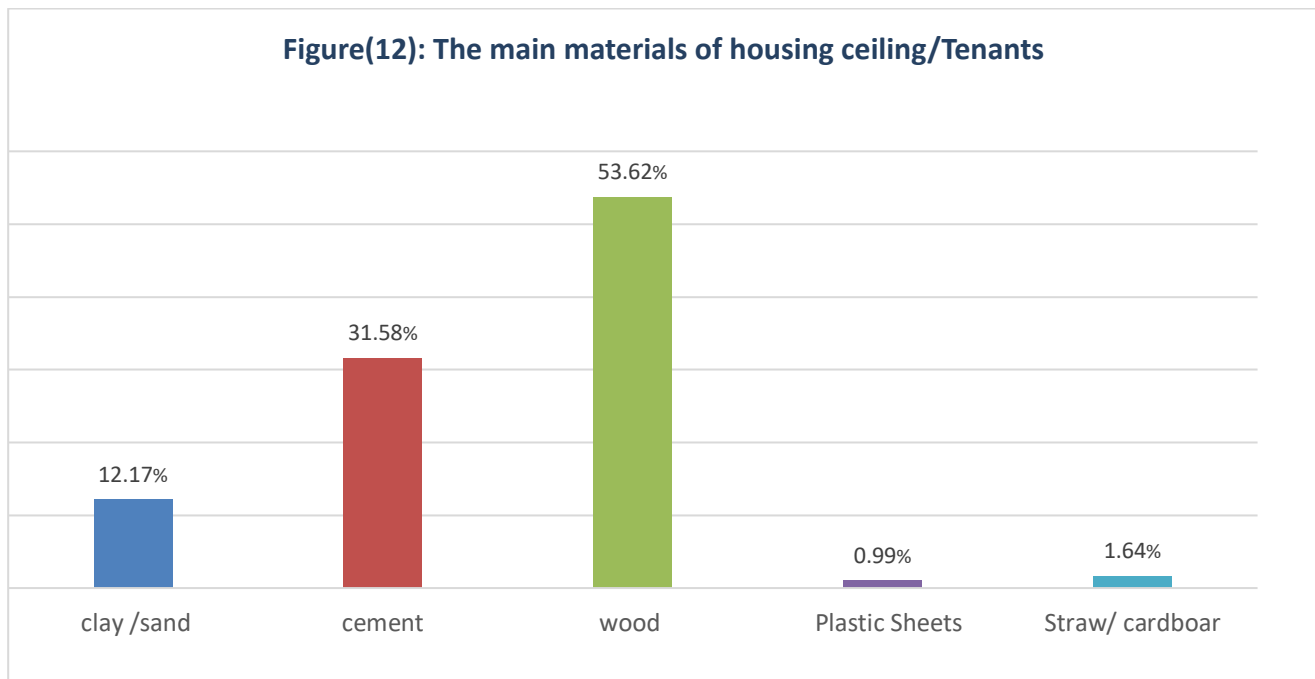
2.3 State of Housing

Figure (11) shows that 48.9% of housing managed by landlords are in acceptable conditions and only need simple repairs, 38.6% are in good conditions and do not need repairs, and 12.5% are in bad conditions and need renovations and maintenance.



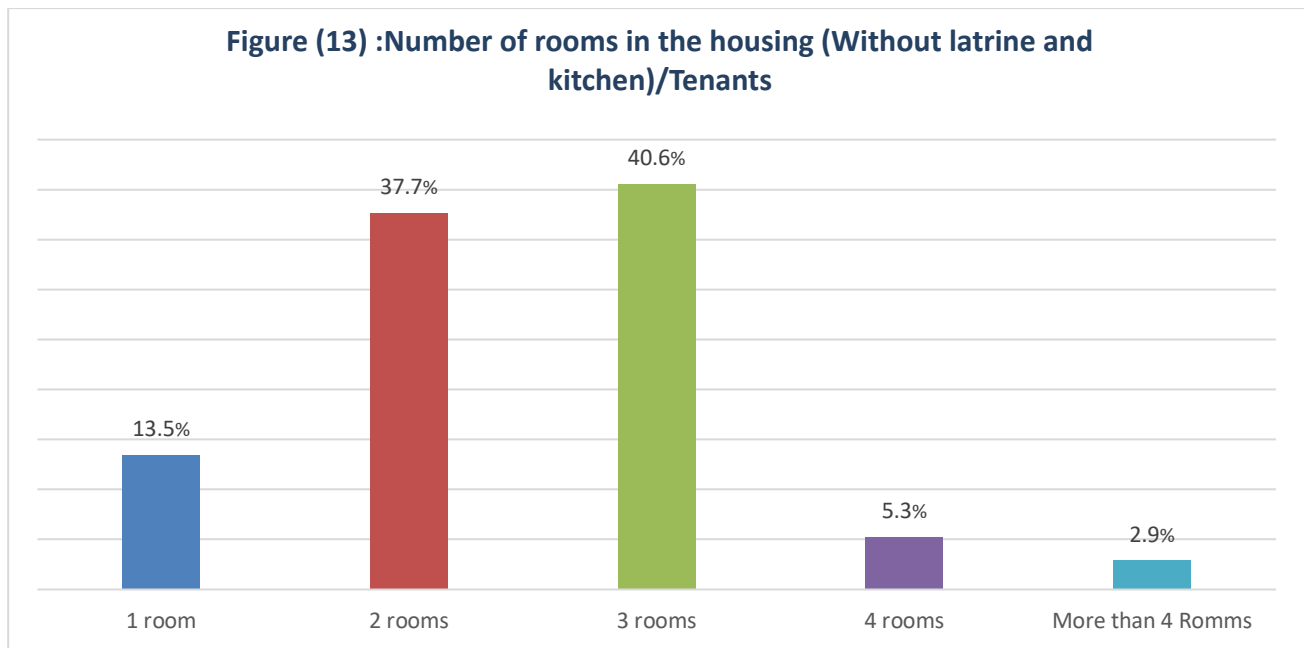
2.4 Material used for Ceilings of the Housing

Figure (12) shows the materials used in the ceilings of the rented housing in the targeted districts. These results show that the material used are 53.62% wood, 31.58% cement, 12.17% clay/sand, 1.64% straw/cardboard, and 0.99% plastic sheets.

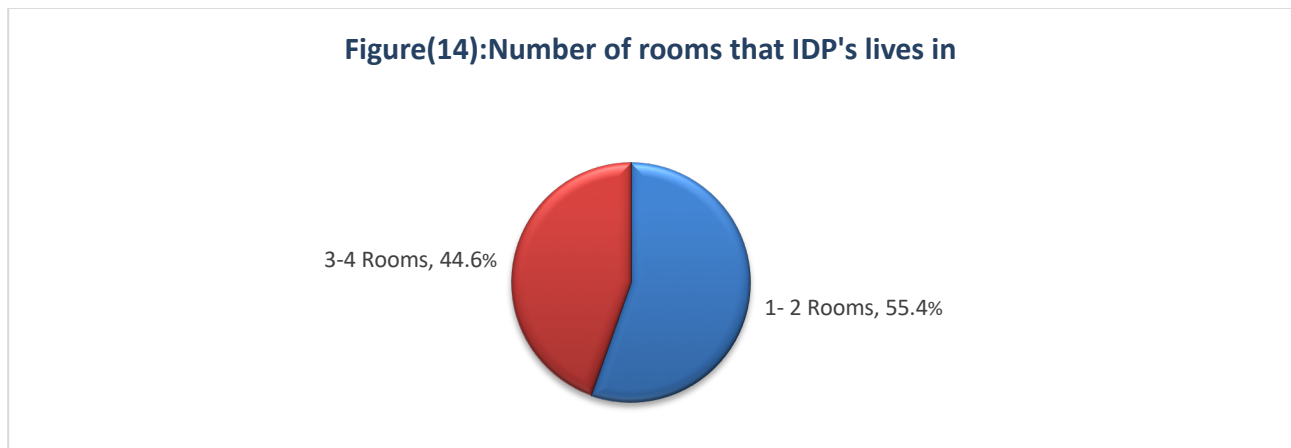


2.5 Number of Housing Rooms:

The results of the tenants' sample analysis (Figure 13) show the number of rooms in rented housing. 40.6% lived in housing that consist of three rooms, 37.7% two rooms, 13.5% one room, 5.3% four rooms, and 2.9% more than four rooms. These results indicate that the majority of tenants live in housing that have two to three rooms which is confirmed by crowding index. The crowding index in Sana'a Governorate shows that every two individuals share a room according to the number of household members 1701 divided by the total number of rooms 601 excluding kitchen and toilet, Table (1).

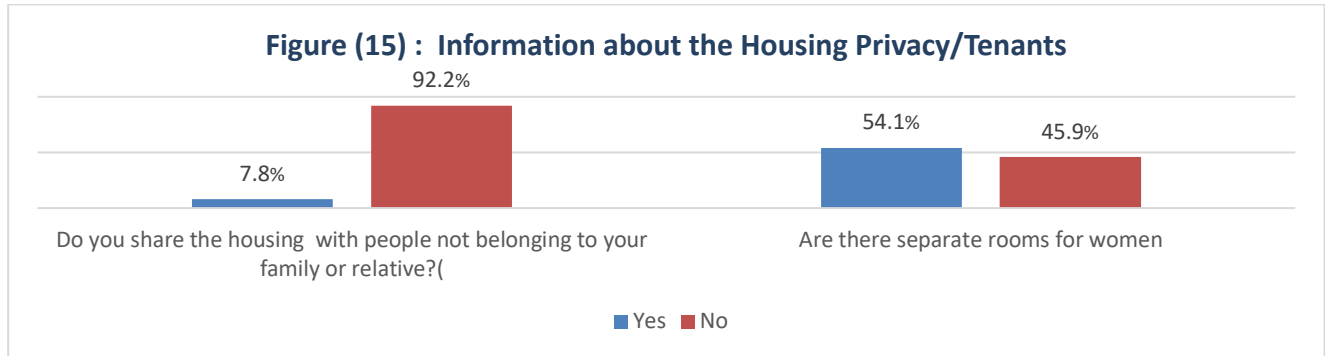


As previously mentioned, 49.2% of the tenants in Sana'a Governorate are IDPs (Figure 5), the study shows that 55.4% of them live in one to two rooms.



2.6 Privacy of the Housing:

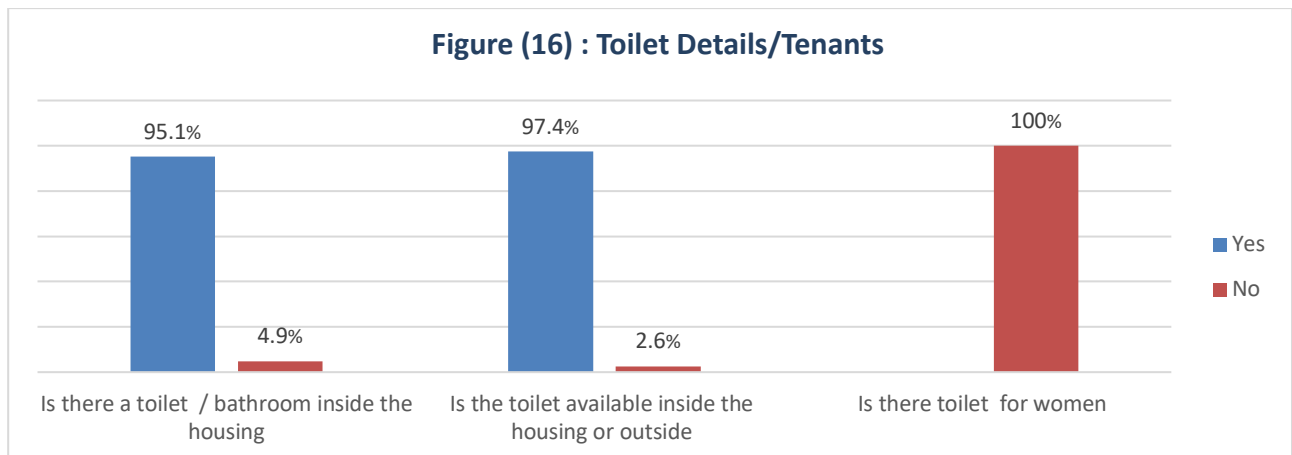
Figure (15) shows that 92.2% of the tenants' housing are not shared by any members from outside the family, and 7.8% are shared by members from outside the family. As for separate rooms for women, results show that 54.1% of the tenants' sample reported having separate rooms for women, whereas 45.9% do not have separate rooms for women. These results reflect the lack of privacy for many women in the tenants' households.



2.7 Availability of Toilets in the Housing

Figure (16) shows that 95.1% of the tenants' sample have a toilet in the housing, while 4.9% do not have a toilet in the housing. The tenants that do not have toilets in their housing are individuals inhabiting huts, tents, and communal housing. The study also shows that 100% of rented housing do not have separate toilets for women. This result indicates that these rented housing do not take this cultural matter into consideration. However, it becomes a privacy problem only when the housing is shared with other families.

Figure (16) shows the location of the toilet in rented housing. 97.4% of rented housing have a toilet inside the housing, whereas 2.6% outside the housing, which reflects the lack of privacy for these families.



As for sharing a toilet, study shows that 6% of the tenants' sample shared a toilet with other families, while 94% did not share the toilet with other families. The number of families that share a toilet is as follows: 64.29% of families indicated that they shared a toilet with two other families, 21.42% with one other family, 14.29% with three other families (Figure.17).

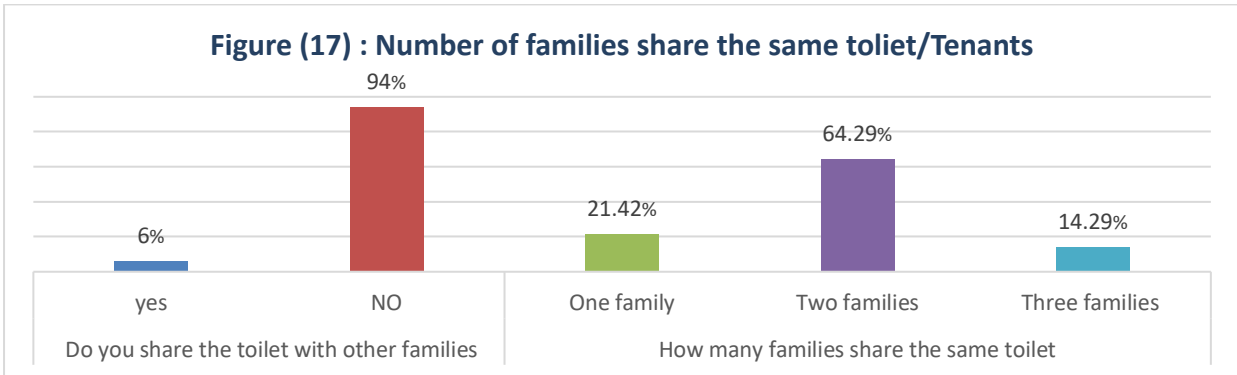
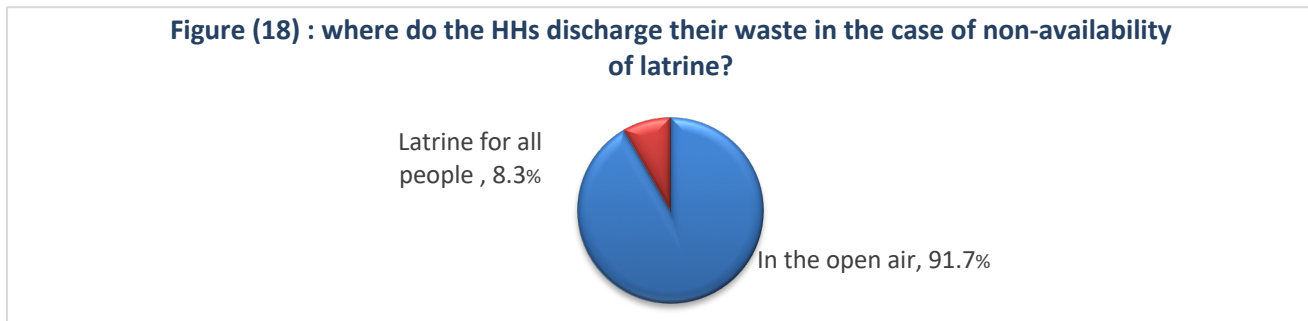
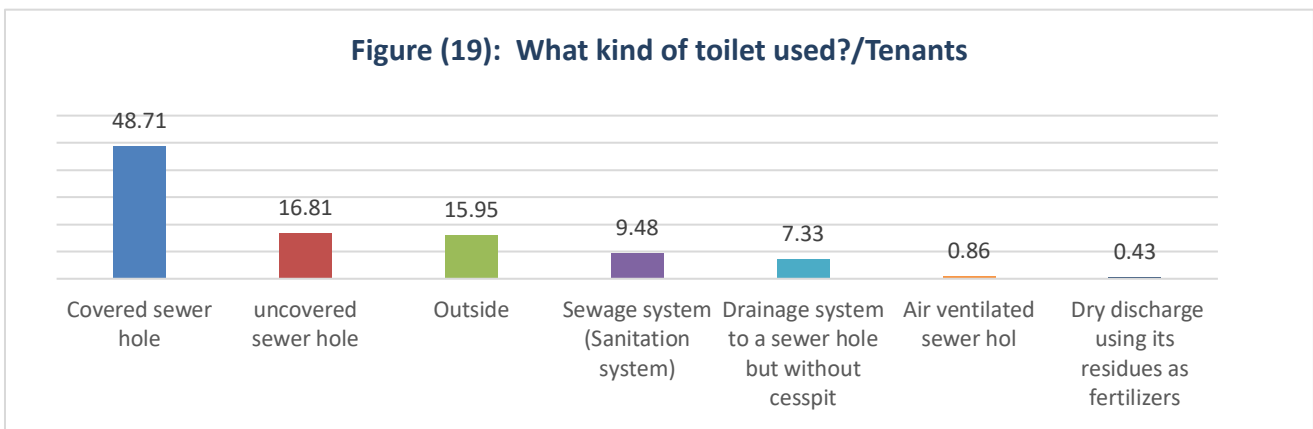


Figure (18) shows the alternatives tenants use in case of unavailability of a toilet, 91.7% of tenants use the outdoor area, and 8.3% use public toilets.



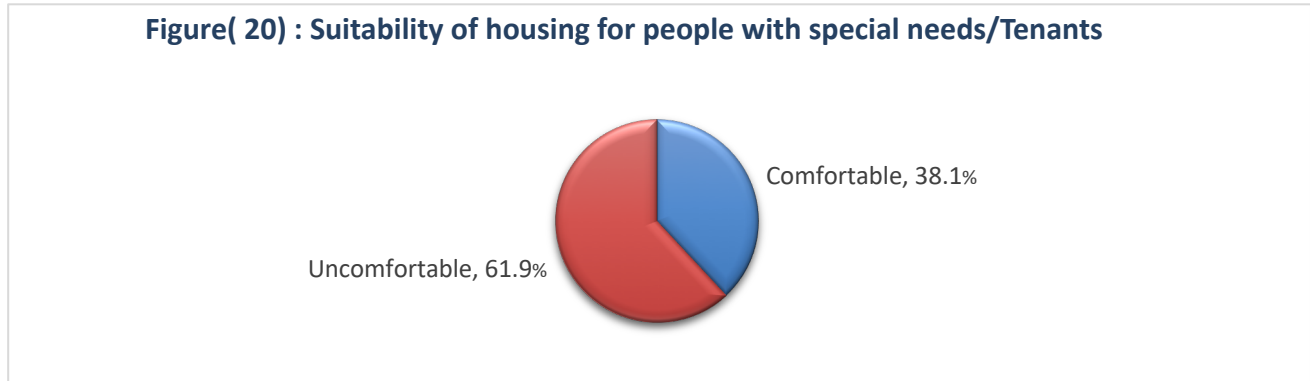
2.8 Type of Sanitation System:

The results of the tenants' sample analysis show the type of sanitation system used by the tenants' households as follows: covered cesspits (covered sewer hole) 48.71%, uncovered cesspits 16.81%, the outdoor area 15.95%, proper public sanitation system, 9.48%, drainage system 7.33%, air ventilated system 0.86%, dry discharge used as fertilizer 0.43%, and pails 0.43% (Figure 19).



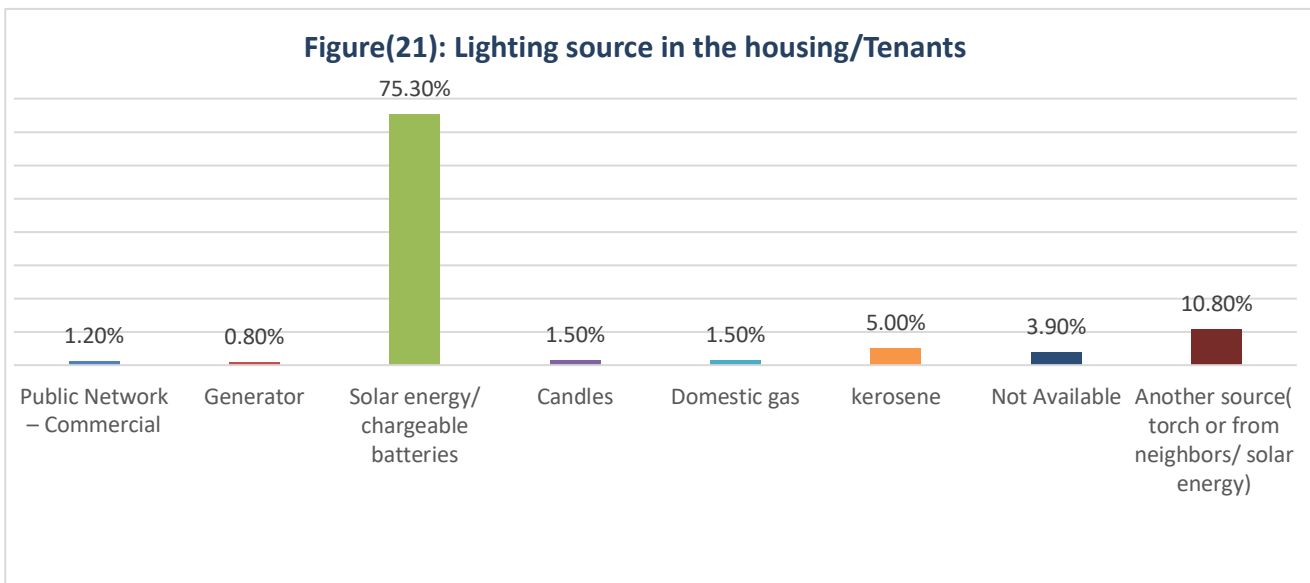
2.9 Suitability of Housing for Special Needs

The results of the analysis show that 61.9% of tenants said that the rented housing are uncomfortable and unsuitable for family members with special needs, whereas 38.1% said the housing are comfortable for individuals with special needs, Figure (20). 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.



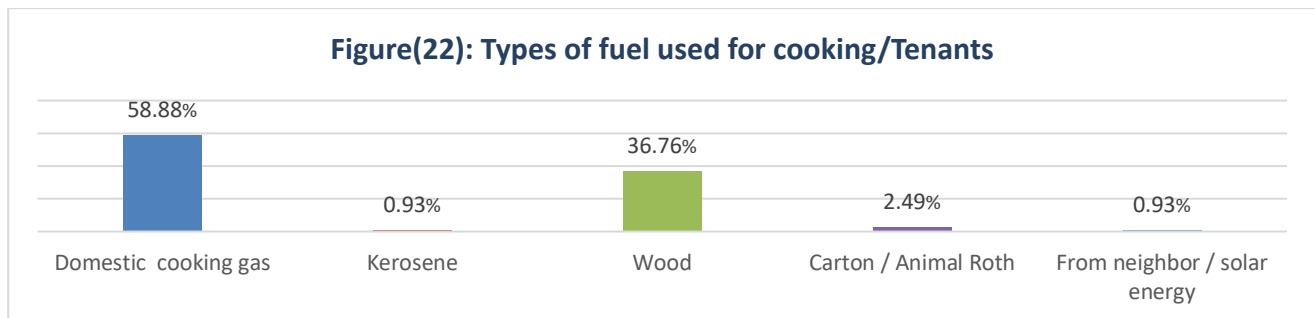
2.10 Source of Lighting:

Figure (21) illustrates the results of the tenants' sample analysis which shows the main sources of lighting in the rented housing of the targeted area as follows: solar energy and rechargeable batteries 75.30%, other source of lighting such as torches 10.80%, kerosene 5%, unavailability source of lighting 3.90%, candles 1.50%, domestic gas 1.50%, public electricity grid / commercial electricity network 1.20%, and generators 0.80%. These results show that solar energy and rechargeable batteries are the primary source of lighting in the Governorate of Sana'a.



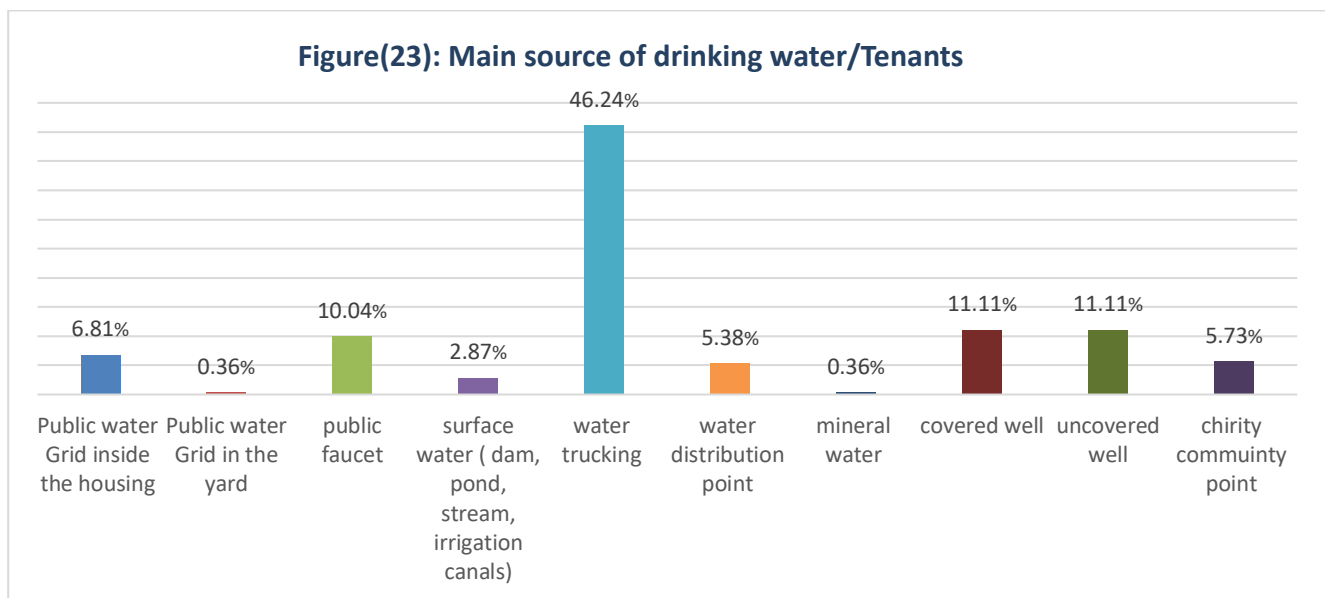
2.11 Type of Fuel used for Cooking:

In the context of the geographical sample of Sana’a Governorate, the analysis of this study shows that the main types of fuel used by the tenants’ households for cooking purposes are: home cooking gas 58.88%, and firewood 36.76%. Followed by cartons/animal waste 2.49%, 0.93% other (from neighbor), and 0.93% kerosene, Figure (22). These results reflect the difficulties faced by some of the tenants, especially IDPs who cannot afford the price of cooking gas and are forced to use firewood and other harmful sources of fuel. Which consequently, reflects negatively on the individuals’ health and constitutes an additional burden on the family in obtaining alternative fuels for cooking.



2.12 Sources of Drinking Water

Figure (23) shows that the main sources of drinking water for tenants, which are as follows: water trucks 46.24%, uncovered wells 11.11%, covered wells 11.11%, public faucet project 10.04%, the public water grid inside the housing 6.81%, charity community water point 5.73%, water distribution point 5.38%, surface water (dams, ponds and streams) 2.87%, mineral water 0.36%, and public water grid in the housing’ yard 0.36%. These statistics reflect the difficulties which most of the tenants’ sample face in obtaining clean drinking water.



3. Access to the Housing:

3.1 Transfer from former residence (Geographical Area)

Figure (24) shows that 40.6% of the tenants' sample are local residents of the area, while 59.4% moved from other areas, which reflects displacement on a large scale.

Figure (24): have you moved here from another area?/Tenants

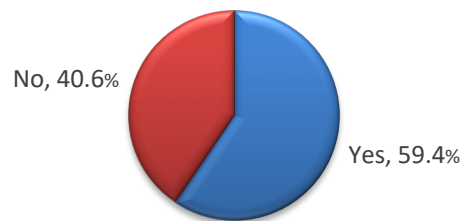
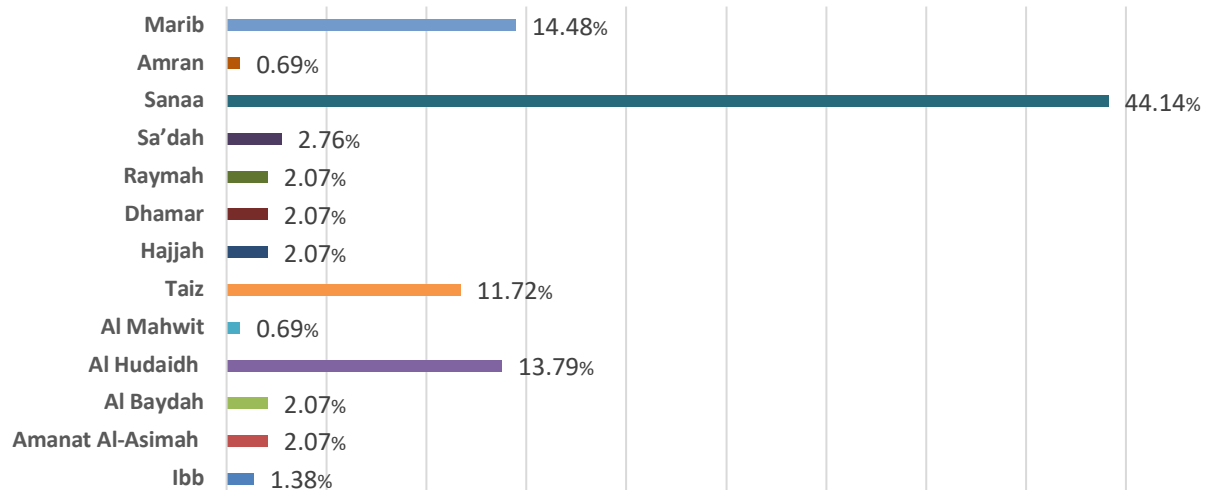


Figure (25) shows the areas of origin where tenants moved from, which are as follows: from areas of conflict within the Governorate of Sana'a 44.14%, Marib 14.48 %, Al-Hudaydah 13.79%, Taiz 11.72%, Amanit Al-Asimah 2.07%, Al-Baydha 2.07%, Hajjah 2.07%, Dhamar 2.07%, Raymah 2.07%, Sa'dah 2.76%, Ibb 1.38%, Amran 0.69%, and 0.69 from Al-Mahwit.

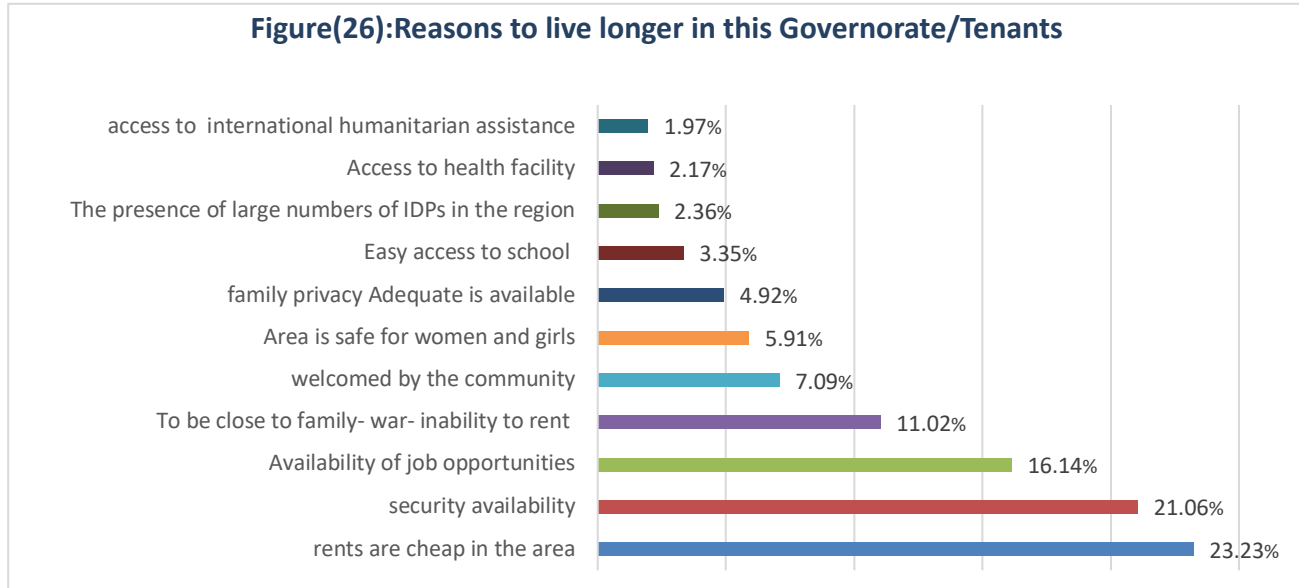
Figure (25): From which Governorates the tenants moved /tenants



The results of the analysis of the FGDs and KII confirmed that a large number of IDPs moved from Serwah district (Marib Governorate), which has been an area of conflict for more than three years due to its proximity to Sana'a. Nehm district also has similar circumstances, Nehm is one of Sana'a Governorate's sixteen districts. The war has displaced many local residents of Nehm district.

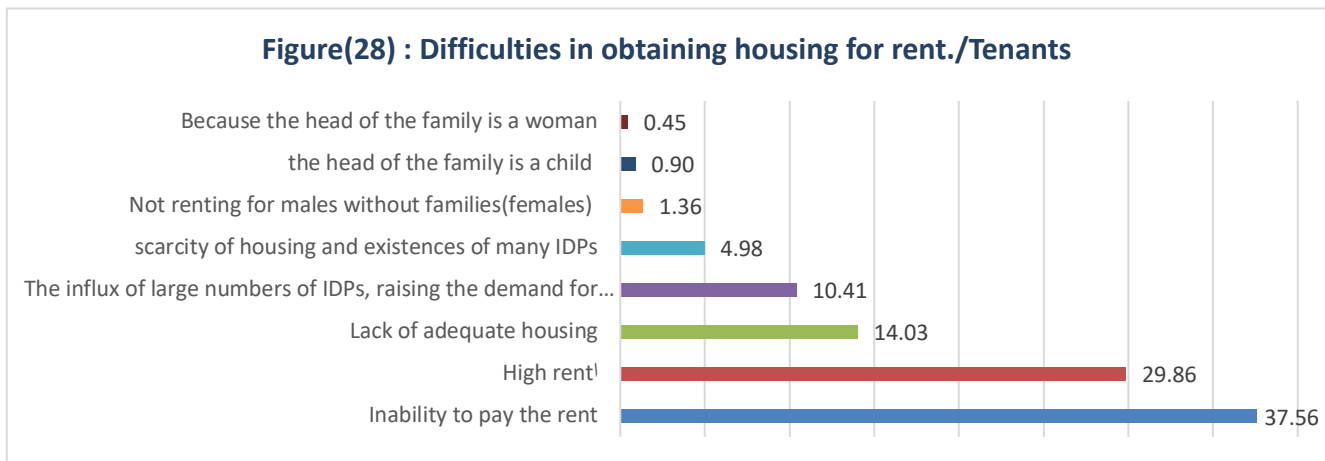
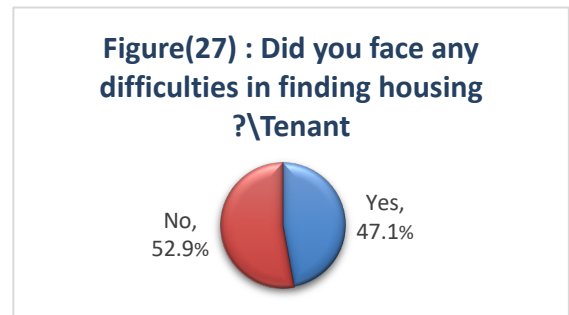
3.2 Choosing the Governorate for Residence

Figure (26) illustrates the reasons tenants/IDPs chose the Governorate of Sana'a for residence, which are as follows: cheap rents in the area 23.23%, safety 21.06%, availability of job opportunities 16.14%, proximity to relatives 11.02%, being welcomed by the community 7.09%, safety of the area for women 5.91%, and the remaining percentage are shown in Figure (26).



3.3 Difficulties in Obtaining Housing and Stability:

Figure (27) shows that 47.1% of the tenants' sample faced difficulties in obtaining a housing, while 52.9% did not face any difficulties. These difficulties are as follows: inability to pay rent 37.56%, high rent costs 29.86%, lack of adequate housing 14.03%, large influx of IDPs to the area 10.41%, lack of rented housing 4.98%, and the remaining percentage is shown in Figure (28).



The results of the landlords' analysis stated the following challenges in the rental market: unavailability of rented housing 14.88%, high rent costs 14.29%, unleased property 13.1%, high demand for housing 12.5%, accumulation of unpaid rent 10.71%, lack of diversity in the rental market 8.93%, inability to make repairs and maintenance for housing due to lack of financial resources 5.36%, inability to repair housing due to lack of building materials and workers 4.76%, high turnover and instability of tenants 3.56%, tenants overcrowding housing 3.56%, lack of basic services 2.38%, lack of income due to loss of jobs 1.79%, evicting tenants 1.79%, tensions in relationships between IDPs and local residents 1.19%, monopoly of the rental market 0.06%, and government's planning restrictions 0.6% (Figure. 29).

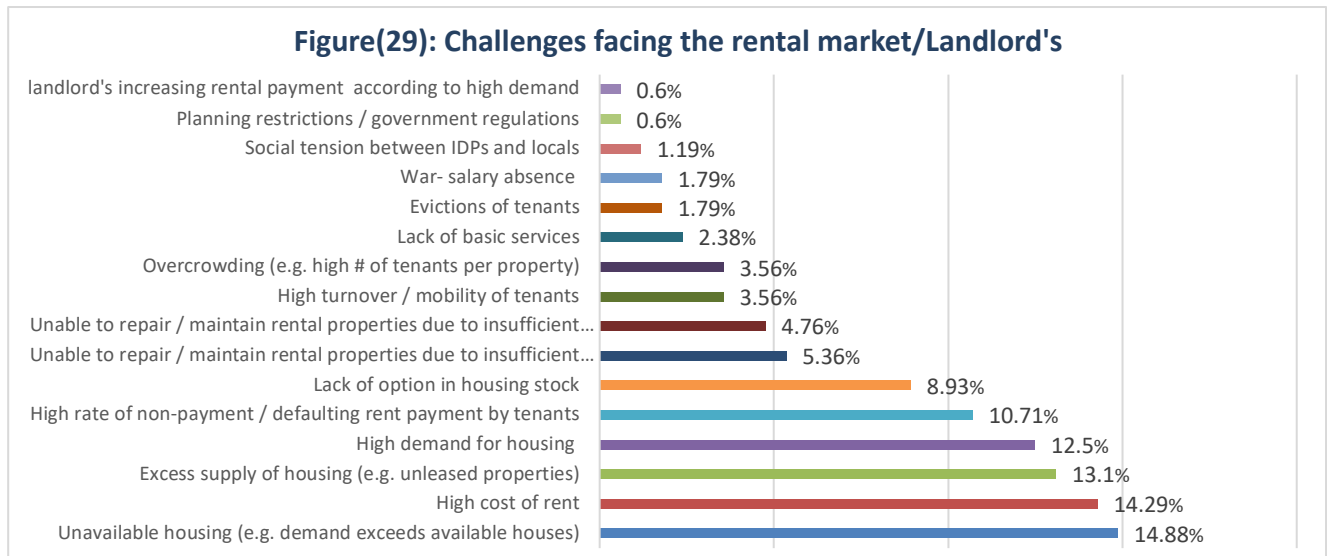


Figure (30) shows the amount of time it takes tenants to find rented housing. The results show that it took 41.4% of the tenants' sample less than a week to find a housing, 26.2% one month, 19.3% more than one month, and 13.1% more than a month. Results show that searching for a housing is not an easy process as it sometimes takes more than a month to find an adequate housing to rent. This reflects that there is a gap between the tenants and the housing advertisements due to the weak role of real estate offices in housing advertisement, and lack of rented housing. The results of the analysis of the focused group discussions and key informant confirmed that the majority of IDPs' main difficulties are: high rent costs, lack of rented housing, and lack of income to pay rents, which effect stability of IDPs in this area.

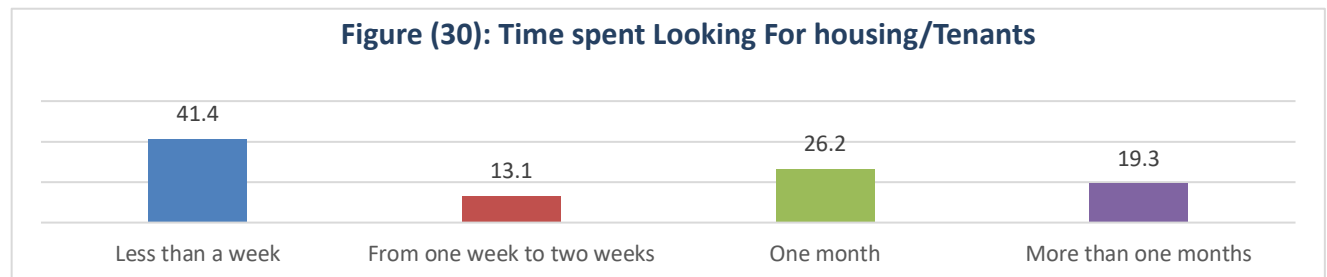
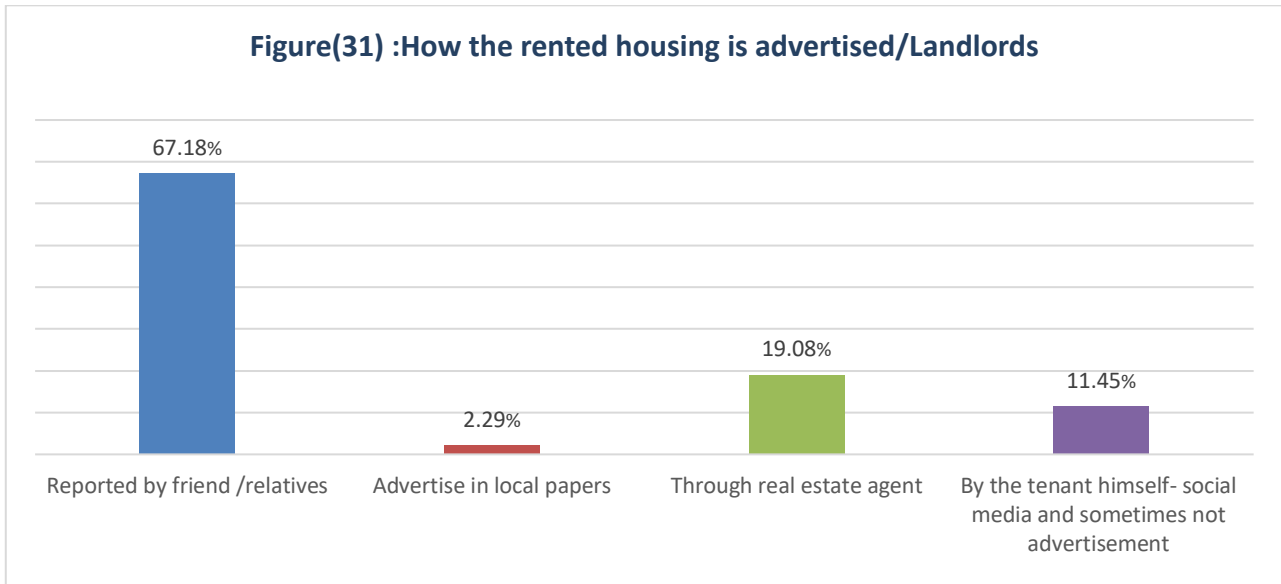
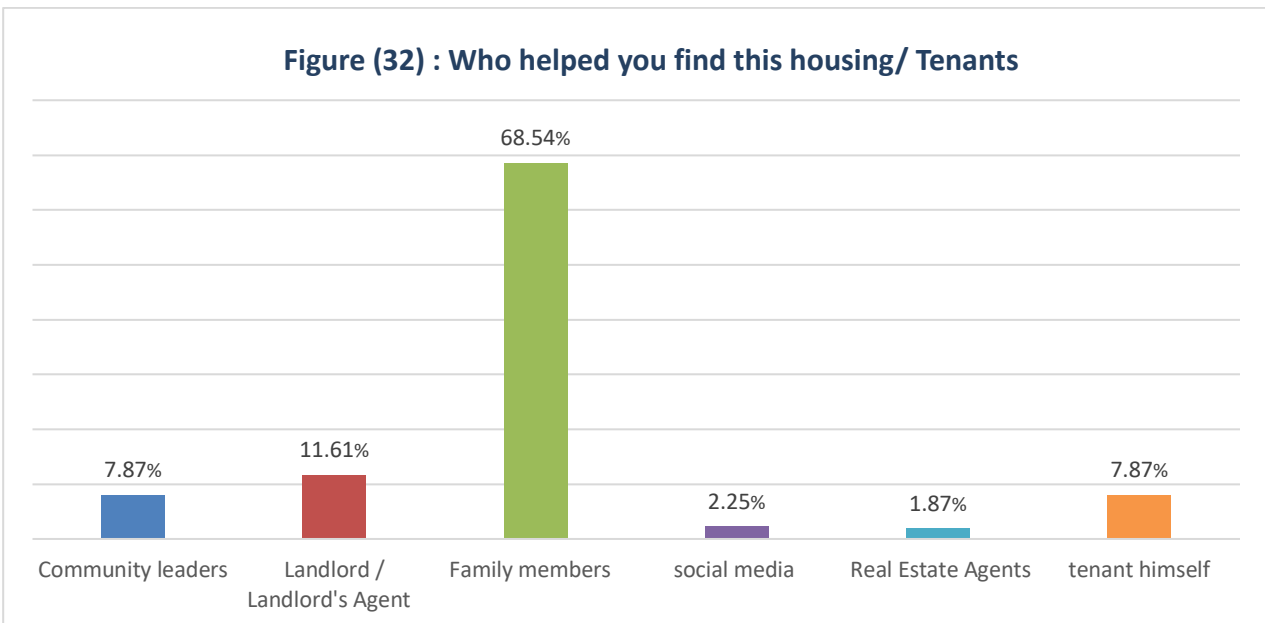


Figure (31) illustrates the methods of advertising rental housing in the Governorate of Sana'a. According to the landlords' sample analysis, 67.18% of tenants rented housing through friends and relatives, 19.08% realtor, 11.45% find housing on their own or through social media, and 2.29% advertisement in local newspapers. These results reveal that the majority of housing advertisements are done through word of mouth (friends/relatives).



3.4 Key Actors in the Renting Market and Housing Access

Figure (32) shows that 68.54% of the tenants' sample found rented housing through relatives and friends, 11.61% landlords/agents, 7.90% tenants themselves, 7.87% community leaders and Sheikhs, 2.25% social media, and 1.87% real estate agents.



3.5 Stability in the Housing

Figure (33) shows that 91.4% of tenants decided to settle in this area, reflecting that a large percentage of tenants are content settling in Sana’a Governorate, 5.3% hesitated to answer because of their inability to make any decision (due to war conditions), and 3.3% said that they are unwilling to stay in the area.

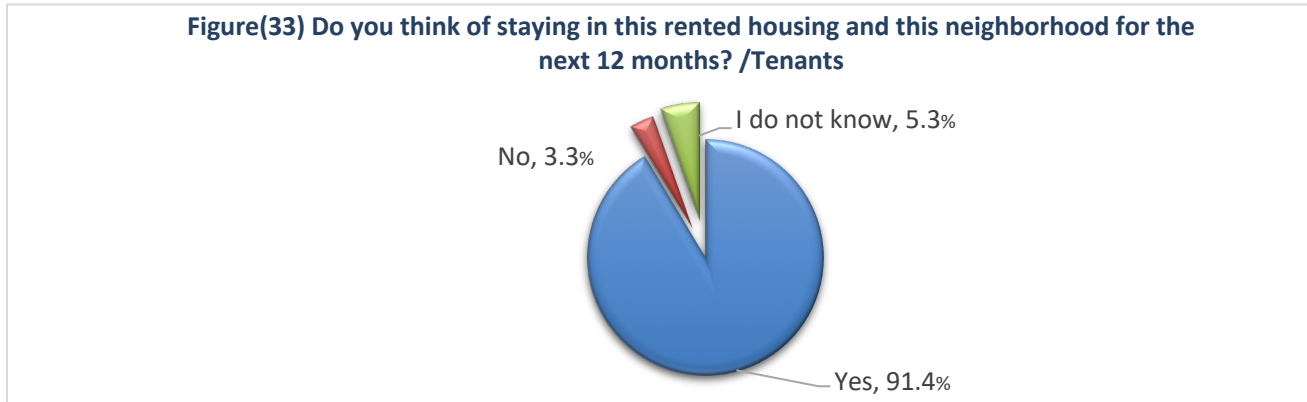
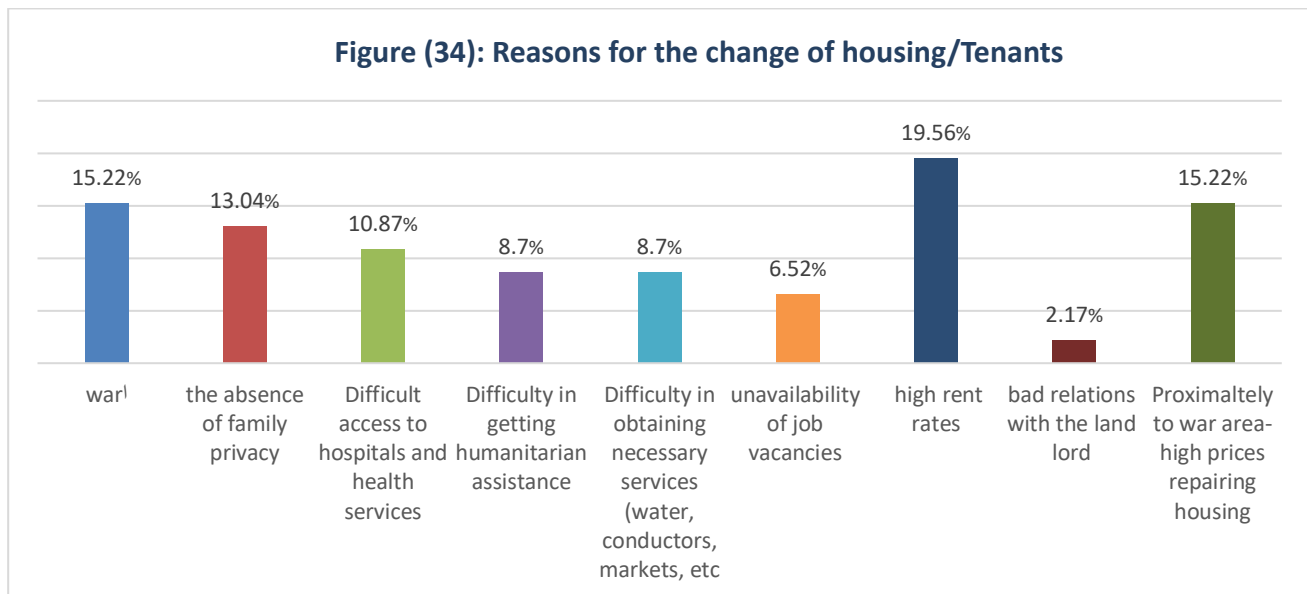


Figure (34) illustrates the tenants’ reasons for moving from their current housing. 19.56% of tenants said it was because of high rent costs, 15.22% the war, 15.22% Governorate’s proximity to areas of conflict, 13.04% lack of family privacy, 10.87% difficulties in accessing hospitals and health services, 8.7% difficulties in accessing humanitarian aids, 8.7% difficulties in getting basic services, 6.52% unavailability of job opportunities, and 2.17% bad relationships with landlords.

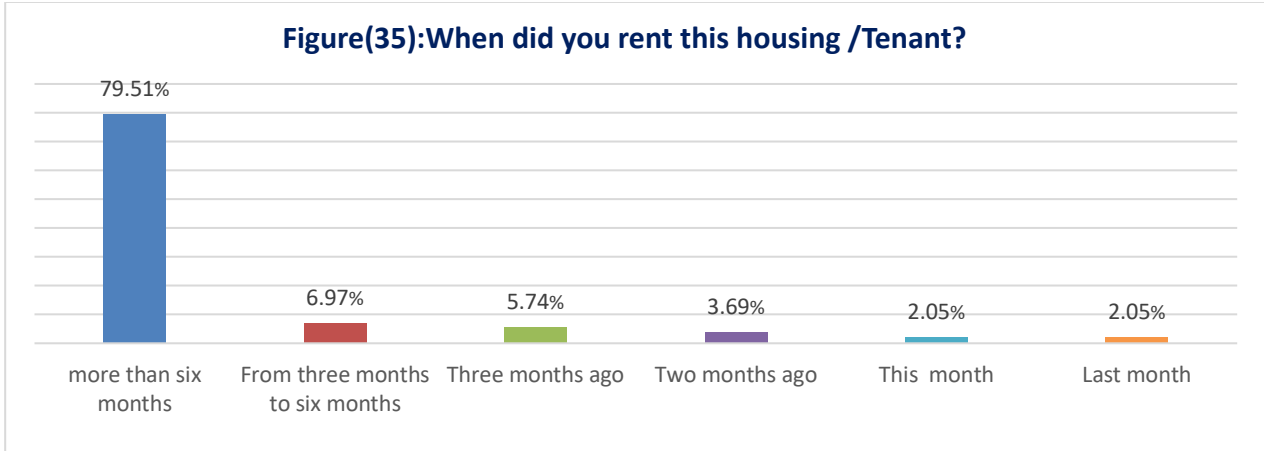


The results of the FGDs and KII confirmed that the majority of IDPs decided to settle in this Governorate because of safety and the presence of relatives in the area.

4. Rent and Key Factors in the Rental Market

4.1 The Rental Period of the Housing

Figure (35) shows the results of the tenants' analysis regarding rental periods. 79.51% of tenants have rented the housing for more than six months ago, 6.97% three to six months ago, 5.74% three months ago, 3.69% two months ago, 2.05% last month, and 2.05% this month. These results indicate that many tenants are former stable residents of the area.



The results of the analysis of focused group discussions and key informant interviews confirm the tenant's analysis results that most tenants starting moving to the area since 2015 (when conflicts started escalating).

4.2 Renting Agreements

The results of the analysis of the tenants' sample (Figure 37) indicate that 86.1% of the tenants have rental agreements with verbal contracts, 7% are legal written agreements, 4.9% are informal written agreements, and 2% housing free of charge. These results reflect that most of the rental agreements in the Governorate of Sana'a are informal agreements, which shows that the rental market in the Governorate is not governed by formal contracts/agreements.

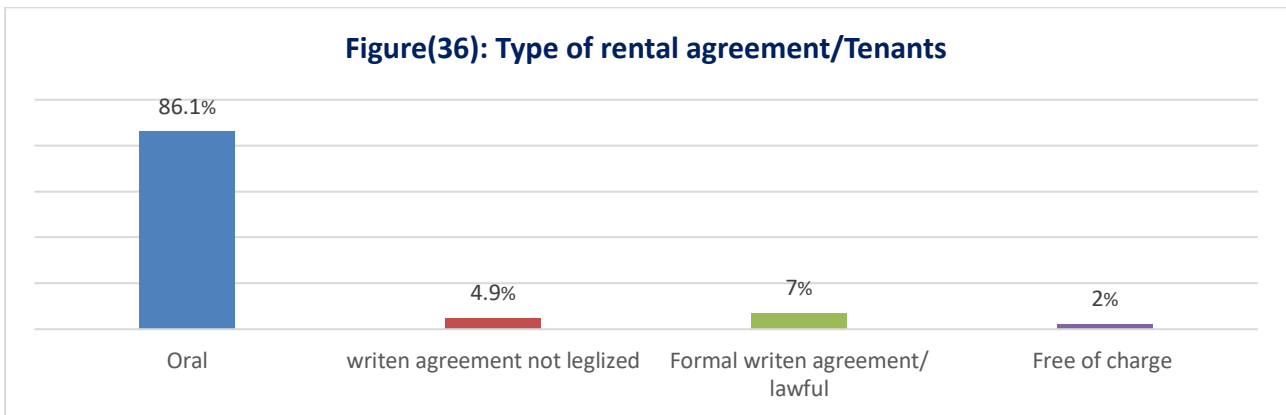
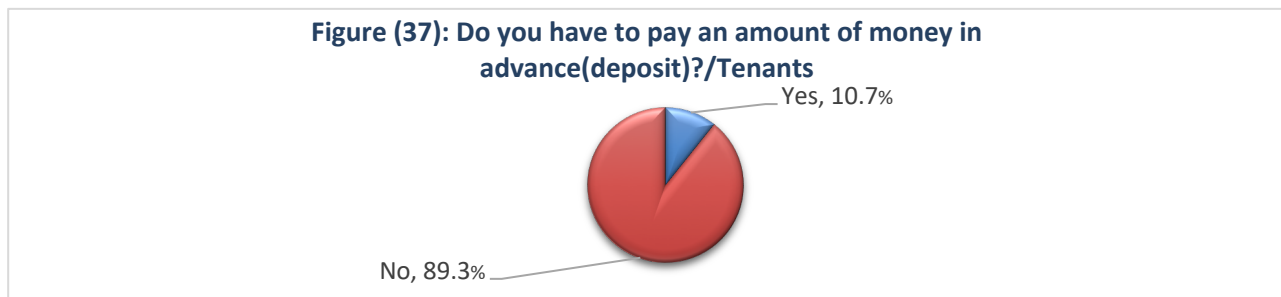
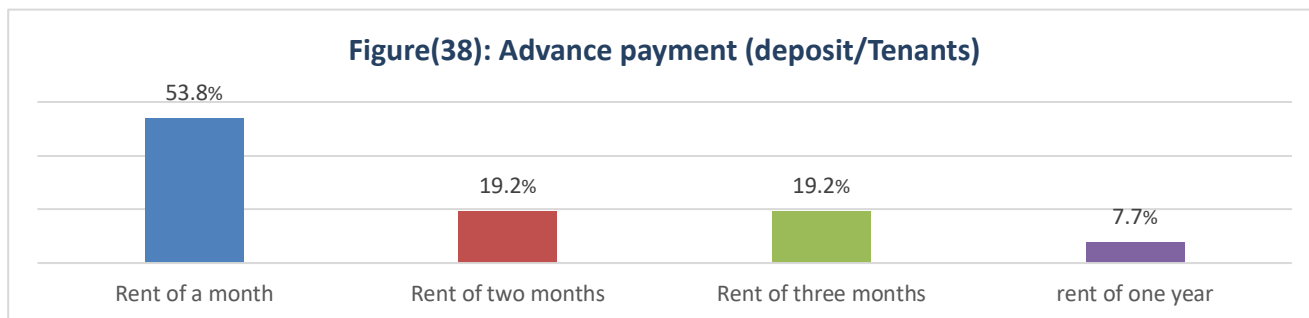


Figure (37) shows that 89.3% of tenants are not obligated to make an advance payment in the rental agreement, whereas 10.7% have to pay a certain amount of money in advance (as collateral for housing repairs upon departure). Which adds an additional burden on tenants.

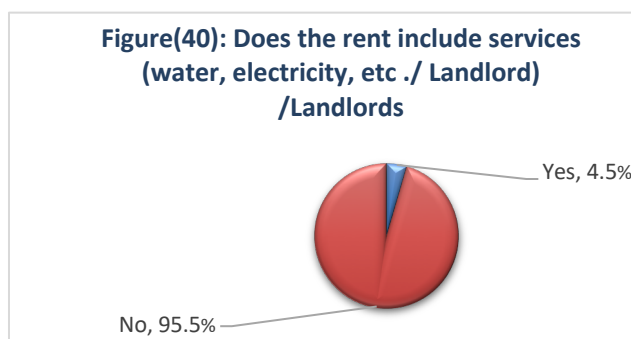
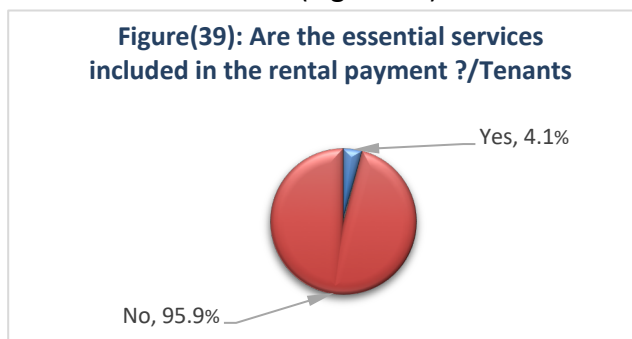


The details of the advanced payment are as follows: 53.8% of landlords required a one month’s rent, 19.2% two months’ rent, 19.2% three months’ rent, and 7.7% of landlords asked for a year’s rent as an advance payment (Figure 38). 100% of the tenants said that they do not expect to retrieve these payments made to landlords.



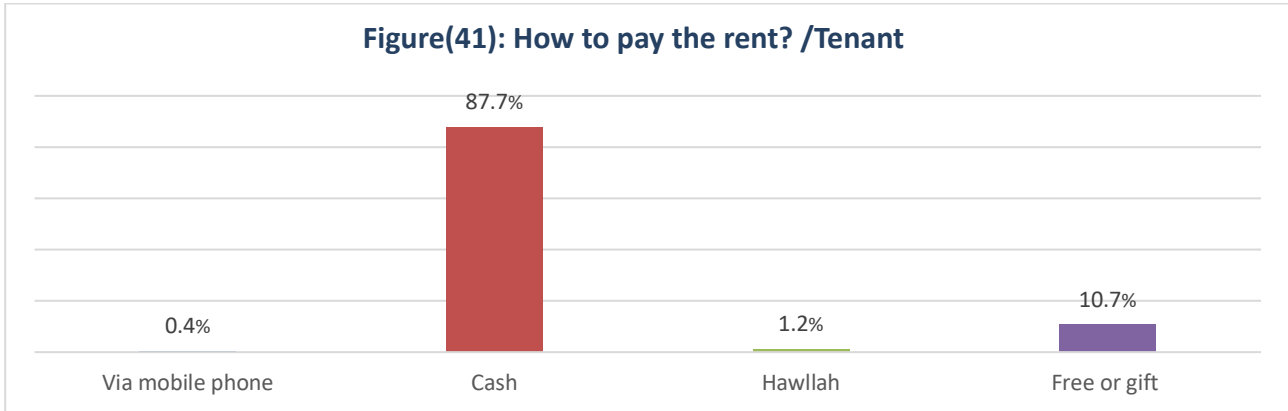
4.3 Services in the Governorate

According to the tenants’ study, results (Figure 39) show that 95.9% of rented housing do not include basic services such as water or electricity, and 4.1% do include basic services (which are separate services with separate cost, except for some shared housing). The landlords’ analysis results show that 95.5% of landlords do not require an advance payment from tenants upon signing the rental contract, while 4.5% demanded an advance payment. Therefore, the results show that the general situation in Sana’a Governorate in this regard is that rent payments do not cover the costs of basic services (Figure 40).



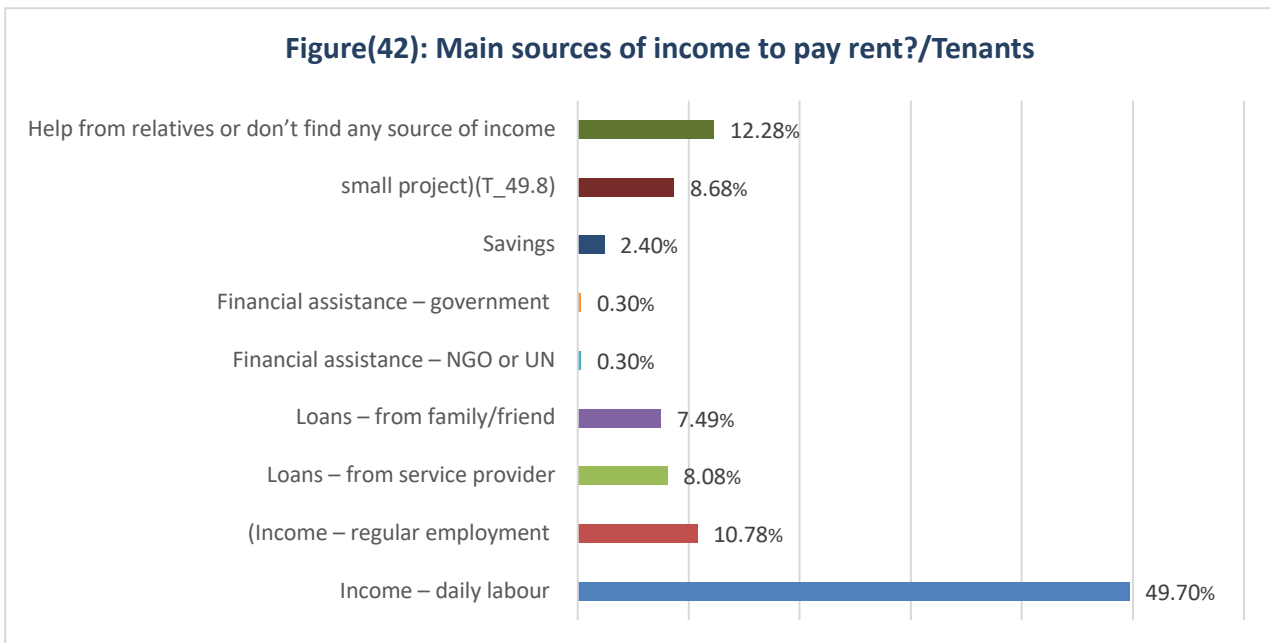
4.4 Rent Payment Methods:

The results of the study (Figure. 41) reveal that 87.7% of the tenants' sample pay the rent in cash, 10.7% do not pay (rent free housing), 1.2% pay through money transfers, and 0.4% via mobile, 1.2% money transfer from bank accounts, and 0.4% via mobile transfer. This confirms that the main method of payment in Sana'a Governorate is in cash.



4.5 Sources of Income to Pay the Rent

Figure (42) illustrates tenants' source of income for paying the rent. 49.70% of the tenants' income is from their daily working labor, 12.28% financial assistance from relatives/do not have any source of income, 10.78% stable income from steady employment, 8.68% from small project, 8.08% loans from service provider, 7.49% loans from family and friends, 2.40% using tenant's own savings, 0.30% financial aids from international organization NGOs/UN, and 0.30% financial aids from the Governorate.



4.6 Paying the Rent

Figure (43) shows the number of months tenants can commit to paying rent over the next coming months. 85.42% of the tenants said that they do not know (because of circumstances of the war), 5.02% one to two months, 3.02% next three months, 3.02% a year (next twelve months), 2.51% cannot pay, and 1.01% next five months. These results reflect tenants' economic situation regarding stability and the psychological stress they go through.

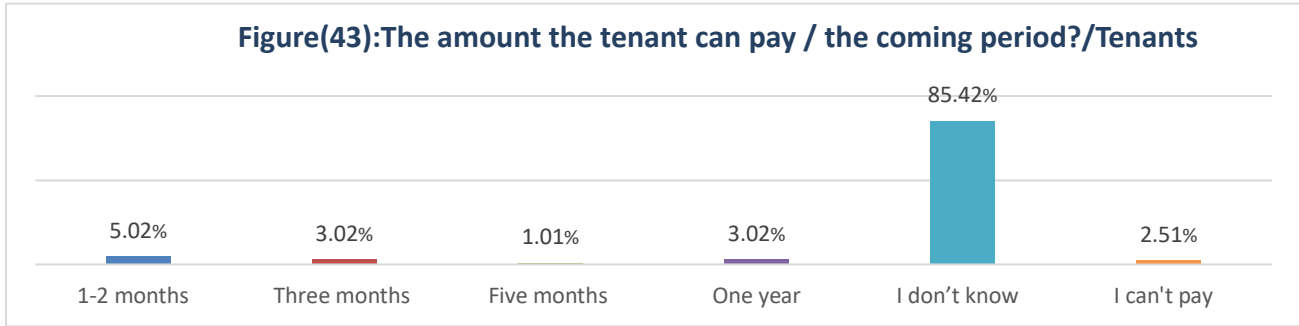


Figure (44) shows that 82.4% of tenants pay the rent directly to landlords, 10.7% do not pay (rent free housing), 5.7% pay rent to agents, and 1.2% through real estate offices. In regards to getting a receipt for rental payment from landlords, study shows that 35% of tenants get a receipt, whereas 65% of tenants do not get a receipt for rental payment (Figure.45).

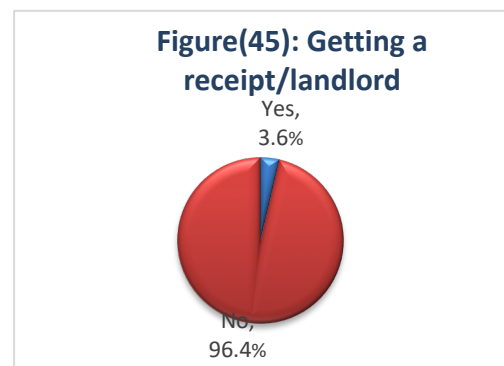
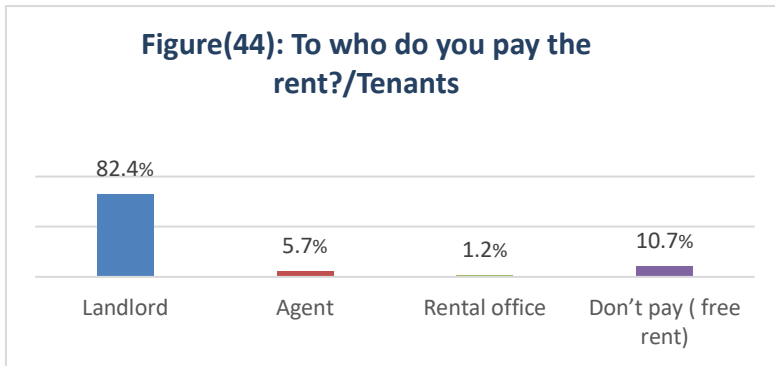


Figure (46) illustrates the rental payment due dates. 75.4% of tenants pay every month, 15.2% have an open period (according to tenant's ability to pay), 4.9% every two months, and 4.5% pay every three months.

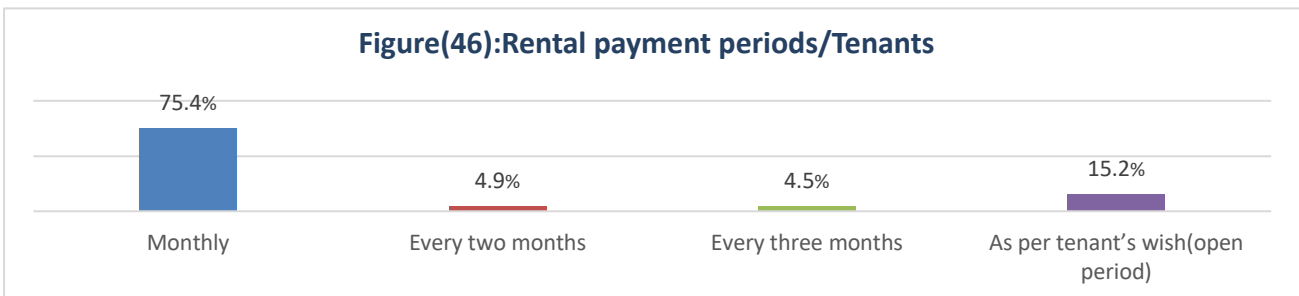
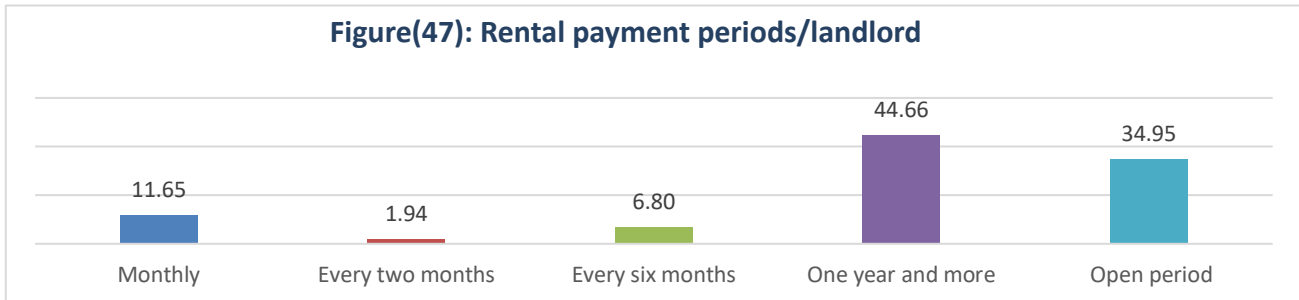


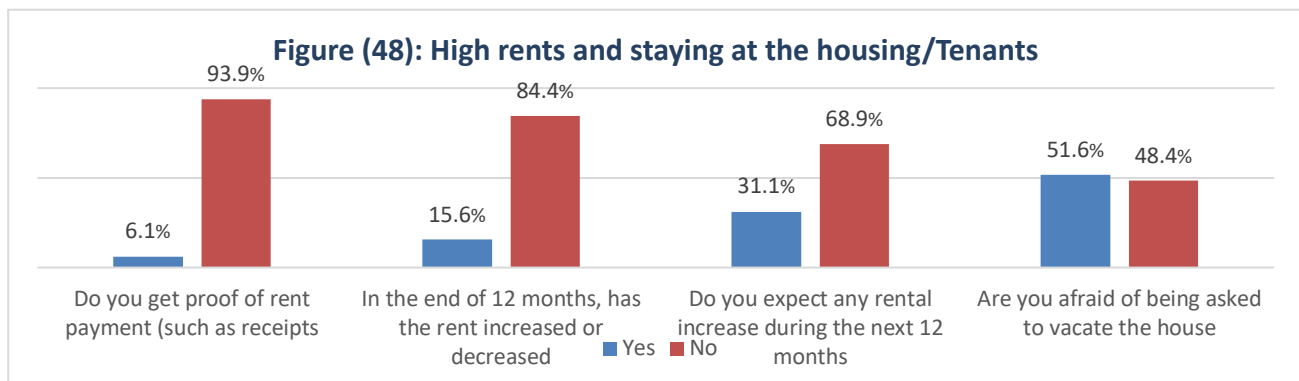
Figure (47) illustrates the payment deadlines specified in contracts/agreements, according to the landlords' sample analysis, 11.65% of landlords require rent payment on a monthly basis, 44.66% one year and more, 34.95% is open period (according to the tenant's financial ability), 6.80% every six months, and 1.94% every two months.

The results show that generally there is no specific deadline for paying rent, rather it varies according to landlords' flexibility and the tenants' financial ability (due to the war, displacement, and loss of jobs).



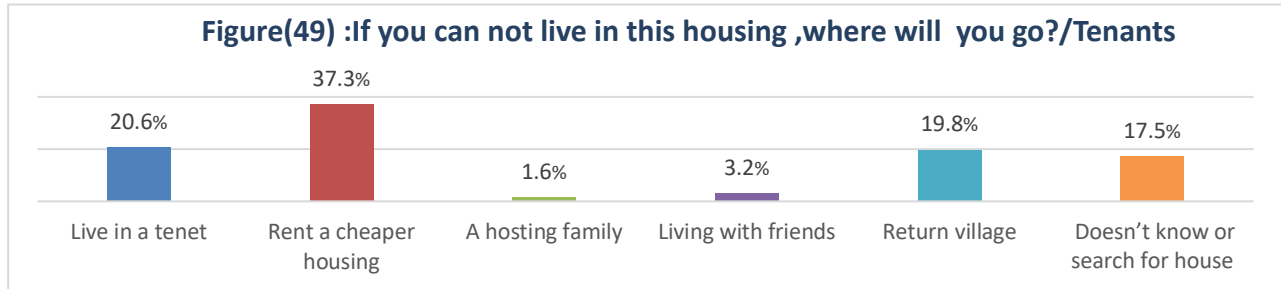
4.7 Rent Increase and Stability

Figure (48) shows the correlation of rent fluctuation and housing stability. The study shows that 84.4% of tenants stated that there was no increase in rent over the past twelve months, whereas 15.6% reported an increase in rent payment during the past year. 31.3% of tenants expected an increase in rent payment in the next twelve months, whereas 68.9% did not anticipate any increase in rent payment. 51.6% of tenants expressed their worries from the possibility of being evicted from rented housing, while 48.4% did not have those fears. The study also shows that of all rent payments, 6.1% of tenants got a receipt, whereas 93.9% did not get a receipt for rental payment



The results of the analysis of focused group discussions and key informant interviews confirm that there are expectations of a significant increase in rent costs due to high demand and low supply for rented housing, and the continuous influx of IDPs, especially those currently displaced from Al-Hudaydah.

Figure (49) illustrates the alternatives tenants are considering if they leave their current housing. 37.3% of tenants will look for cheaper housing, 20.6% live in tents, 19.8% return village /hometown, 17.5% do not know where to go, 3.2% live with a hosting family, and 1.6% live with friends.



The results of the analysis of focused group discussions and key informant interviews differed with the results of the tenants’ analysis. The majority of opinions confirmed that IDPs are not evicted from rented housing, and if in some cases they are, it happens rarely because the local community sympathizes with IDPs. The majority of opinions indicated that IDPs who leave their housing is usually because they will return to their homes in conflict areas as a result of their inability to find alternative housing (because they would rather die than become homeless).

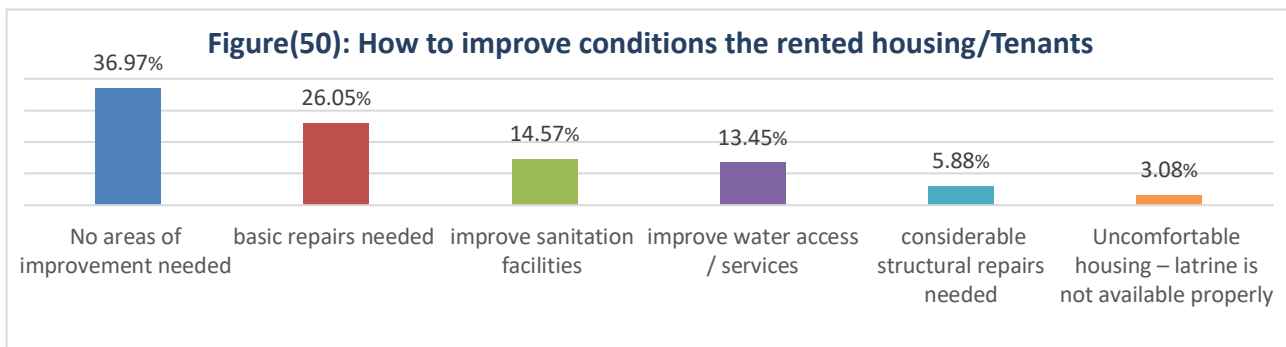
4.8 Total of Income of Tenants and their Families

The results of the tenants’ sample analysis show that the collective income of working members in the household is 40,242 YER on averages. This low income reflects the extent of the humanitarian and economic crisis that tenants are enduring, especially IDPs that face difficulties paying for rent, food, health, and education.

5. Housing Improvement and Accessing Assistance

5.1 Housing Improvement

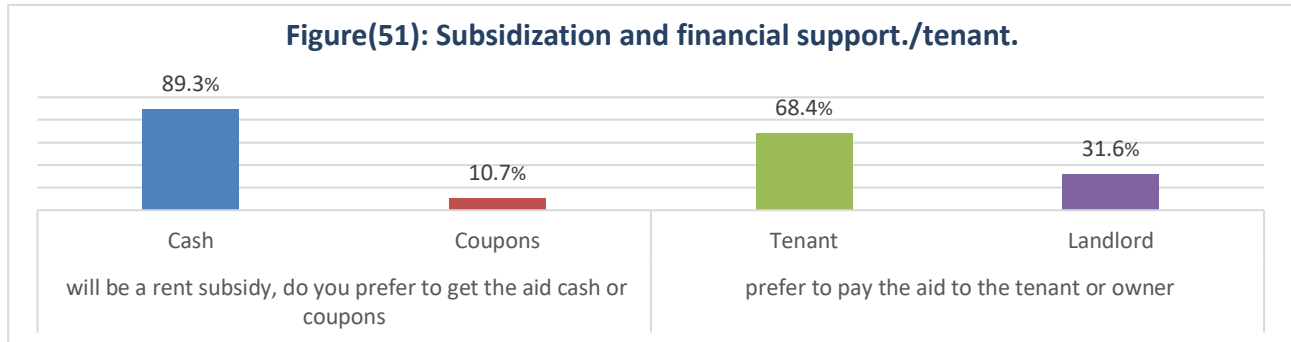
Figure (50) shows areas of improvement stated by tenants in order to improve the living conditions of rented housing. 36.97% of tenants said that there is no need for improvement, 2.05% housing



need basic repairs, 14.57% improvement in sanitation services, 13.45% improvement of water services are required, 5.88% housing need considerable repairs and maintenance, and 3.08% said that housing are uncomfortable (toilets are not available).

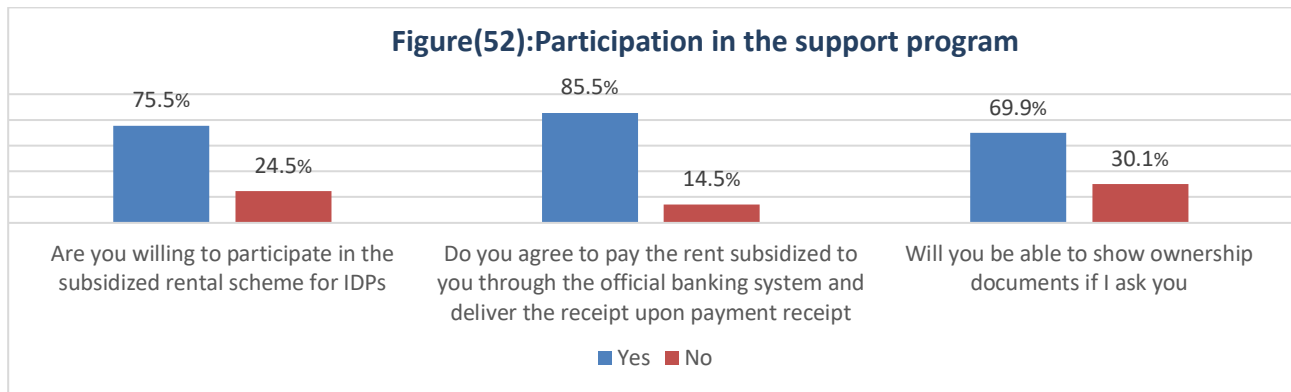
5.2 Accessing Assistance

Figure (51) shows that 89.3% of tenants prefer to receive rental assistance in cash, and 10.7% through vouchers/coupons. The study also showed that 68.4% of tenants preferred that rental assistance be paid to tenants, while 31.6% preferred it be paid directly to landlords.



6 Taking Advantage and Participating in Support Programs:

The analysis of the landlords’ sample shows the percentage of landlords who are willing to participate in rental support programs for tenants especially IDPs (Figure 52).



6.1 Show Property Documents

Figure (52) shows that 69.9% of landlords are willing to show housing’ ownership documents, whereas 30.1% are not willing do so.

6.2 Method of Receiving Rental Funds

As for the method of receiving rental funds, 85.5% of landlords are willing to receive the rent through the banking system and provide a receipt, while 14.5% are not to do so, Figure (52).

6.3 Preparedness for Participation

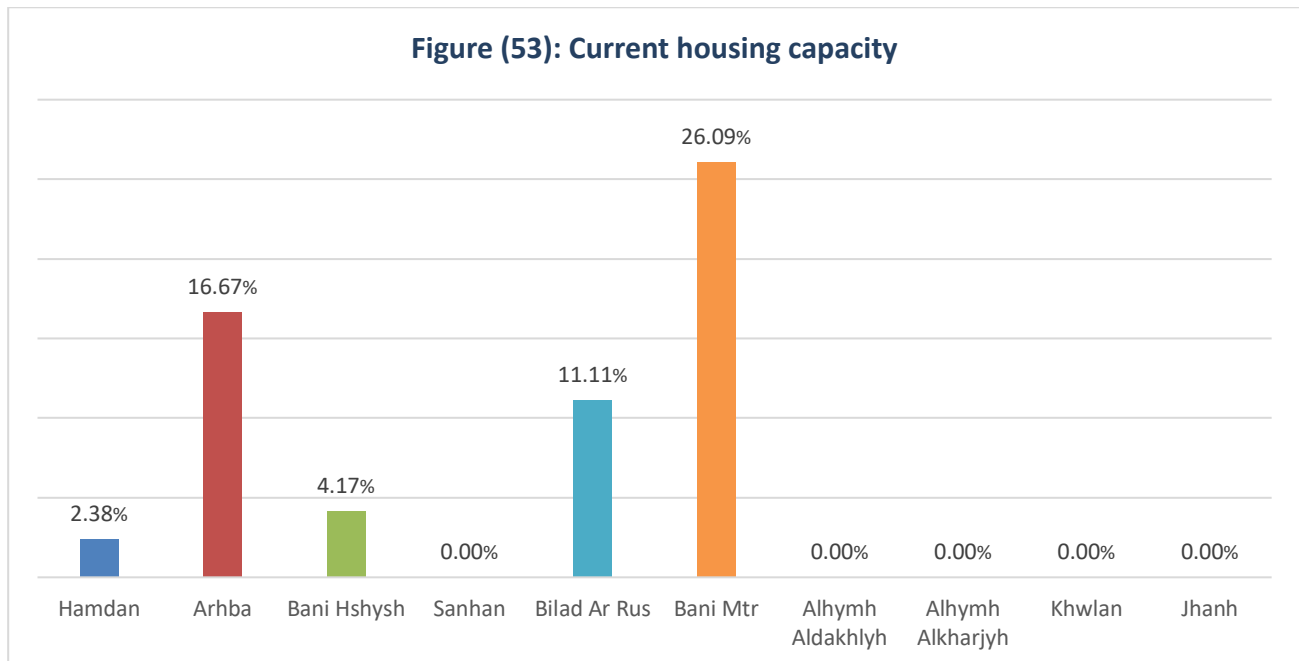
75.5% of landlords are willing to participate, while 24.5% are not willing to participate (Figure 52).

Section 2: Host Community Capacity Assessment

1. Rental Housing Capacity and Rent Value

The analysis reveals that the housing capacity in the Governorate of Sanaa is quite limited. 94.86% of housing are occupied, while only 5.14% were vacant

Figure (53) shows that the current rental housing capacity is too limited in the districts of Bani Mtr 26.09%, Arhb 16.67%, Bani Hshysh 4.17%, and Hamdan 2.38%, while the other districts have no capacity at all. These results seem, to a large extent, are consistent with the data from the interviews administrated by key informants who highlighted the difficulty in finding rental housing within their districts. For more details at the district level, check the Housing Capacity Table annex (6).



The analysis of tenants' data in the Governorate shows that the housing' rents varies between 20,000 YER and 50,000 YER, which is reasonable when compared to the size and quality of the rented housing. The study shows that the average rent in the Governorate is 27,033 YER. 18.8% of tenants do not pay rent directly to landlords but pay indirectly through offering services such as working for landlords in their land and/or providing maintenance for the rented housing.

2 Community Hosting IDPs

Sana'a is considered as one of the most important Governorates where IDPs are moving to because of its geographical proximity to many important areas of conflict, the existence of social ties between the local residents and IDPs, and for being distant from areas of conflict (safety).

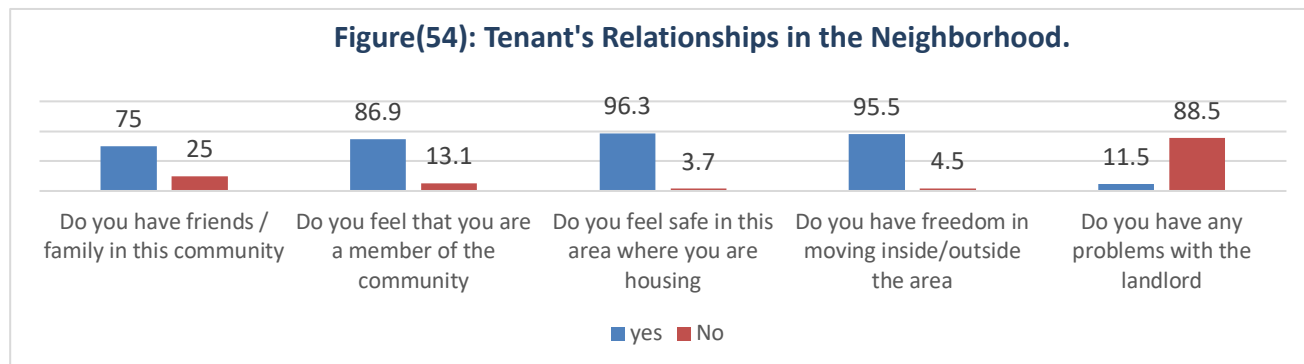
The analysis shows that the community of Sana'a Governorate respects and supports IDPs and does not discriminate against them. However, the analysis of the KII and FGDs shows that hosting IDPs is connected to family relations/connection between the local community and IDPs. One participant said: "It is very difficult to host IDPs unless they are a member of the hosting family, If the IDP is a member of the family, he/she will be hosted". This issue was discussed by many participants in the focus group discussions. However, the community is willing to host IDPs as tenants in their neighborhoods.

The study shows that the capacity in the Governorate is still available because of the construction of new housing, but high rent costs are one of the main problems faced by IDPs. One participant in the focus group said: " There are available housing for rent because of the construction of new housing."

The study also revealed that targeting IDPs exclusively with humanitarian aids is causing a rift between the local community and IDPs because there are local residents that are at the same level of poverty as IDPs. This problem may result in obstacles for IDPs related to accessing basic services and social interaction with the host community .This point has been indicated by the key informants and by the FGDs' participants and seems to be agreed upon by the hosting community. One participants said: " humanitarian assistance mainly target IDPs, while the hosting community do not have any assistance from NGOs or the government".

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

Figure (54) shows that 75 % of the tenants' sample have friends and families that live in the same area, and 25% do not have friends or relatives in the same neighborhood.



3.1 Feeling Safe and Freedom of Movement in the Neighborhood

Figure (54) shows that 96.3% of tenants/IDPs feel safe in the neighborhood of the targeted area, and 3.7% do not feel safe. These results indicate that the area is suitable for hosting IDPs. The results also show that 86.9% of tenants feel that they are part of the local community where they live, and 13.1% do not feel that way. This was confirmed by the results of the analysis of the FGDs and KII that the majority of IDPs chose to live in this area due to safety reasons.

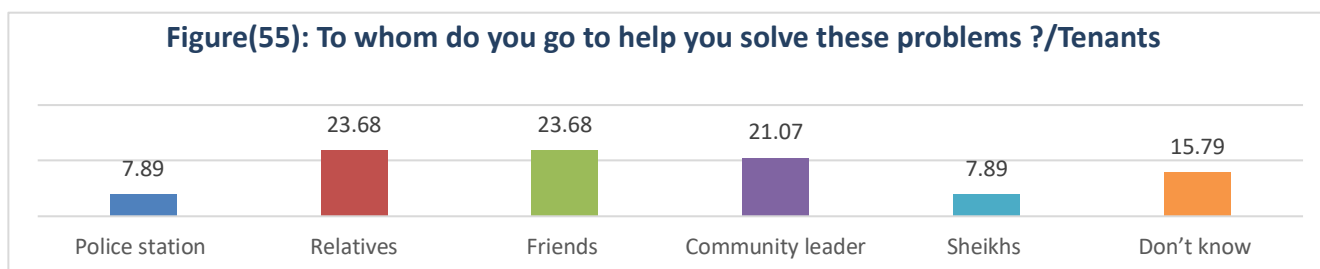
Figure (54) shows that 95.5% of tenants feel that they have freedom of movement both inside and outside the area where they live, whereas 4.5% do not feel that they have freedom of movement in their neighborhood.

The results of the analysis of FGDs and KII confirm that many IDPs have families/relatives and tribal relations in the target area due to their geographical proximity to Sana'a Governorate. However, there are a number of new IDPs who moved from Al-Hudaydah Governorate that are being welcomed by the local community despite the fact that there are no relationships between them and the local residents of the target area.

3.2 Tenants / IDPs Relationship with Landlords

Figure (54) shows that 11.5% of tenants have problems with landlords, while 88.5% do not have any problems with landlords.

Figure (55) illustrates who tenants go to in order to settle their problems with landlords. 23.68% said that they go to relatives, 23.68% friends, 21.07% community leaders, 7.89% sheikhs, 15.79% do not know where to go, and 7.89% of tenants go to police stations.



3 Community Based Organizations

CBOs working in Sana'a 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. 14 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 Sana'a Governorate shows the availability of (39) 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 Sana'a. The study's consultant was able to gather full data on NFI/shelter suppliers (full data is attached in - Annex 5). 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 8 districts of Sana'a Governorate is attached in - Annex (4).

7 Conclusions

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

- Sana'a Governorate has witnessed an exodus of IDPs from a number of Governorates and from within the districts of Sana'a since the outbreak of the war. Marib, Sana'a (Nehm district), Al-Hudaydah, and Taiz are the main areas from which IDPs moved from, especially in the past few months as conflicts erupted on the outskirts of the city of Al-Hudaydah.
- The Governorate of Sana'a is considered as one of the most important Governorates where IDPs are moving to because of its geographical proximity to many important areas of conflict, the existence of social ties between the local residents and IDPs, and for being safe (distant from areas of conflict).
- The analysis illustrates the tenants' age category in the target districts. The age categories of tenants are: 41.27% over 18 years to 55 years, and 36.45% over 5 years to 18 years, 17.34% less than 5 years old, and 5% of family members over 55 years. And according to the results of the analysis, the gender of the tenants is 53.56% males and 46.44% females (Table 1). These results reveal the magnitude of suffering endured by the greater part of the household which are women and children, especially for IDPs.
- The results of the analysis of the tenants' sample (Figure 37) indicate that 86.1% of the tenants have rental agreements with verbal contracts, 7% are legal written agreements, 4.9% are informal written agreements, and 2% housing free of charge. These results reflect that most of the rental agreements in the Governorate of Sana'a are informal agreements, which shows that the rental market in the Governorate is not governed by formal contracts/agreements.
- The analysis of tenants' data in the Governorate shows that the housing' rents varies between 20,000 and 50,000 YER per month, which is reasonable when compared to the size and quality of rented housing.
- The analysis of tenants' data in the Governorate shows that the housing' rents varies between 20,000 YER and 50,000 YER, which is reasonable when compared to the size and quality of the rented housing. The study shows that the average rent in the Governorate is 27,033 YER. 18.8% of tenants do not pay rent directly to landlords but pay indirectly through offering services such as working for landlords in their land and/or providing maintenance for the rented housing.
- Analysis shows that the IDPs consider themselves part of the hosting community and do not face security problems or concerns.

- Most of the problems and challenges facing the hosting community are pressure on services such as health, education, overcrowding school classrooms, and humanitarian aids going exclusively to IDPs.
- The results show that 48.9% of housing managed by landlords are in acceptable conditions and only need simple repairs, 38.6% are in good conditions and do not need repairs, and 12.5% are in bad conditions and need renovations and maintenance, Figure (11).
- The analysis reveals the acceptance of the local community to receive more IDPs in the targeted area, although they can be accommodated only in a limited capacity due to the lack of housing available for rent.
- In regards to participating in future rental assistance programs for IDPs, the results of the analysis showed an approval of 75.05% among landlords to participate in any future programs to support rents for the IDPs, 69.09% of landlords are willing to show housing ownership documents, and 85.05% are willing to receive rent through the banking system and provide a delivery receipt.

❖ **Summary of the results of the focused group discussions and key informant interviews.**

- The results of the analysis of FGDs and KII of both genders confirm that the community of Sana'a is a tribal society that respects and accepts the presence of IDPs in all circumstances and has very good relations with them. The community also supports IDPs despite the difficult circumstances which the country is going through. However, there are some challenges facing the community due to the presence of IDPs, such as pressure on water, health and education services which were challenges faced by the local community even before the arrival of IDPs.
- The results of the study also revealed the fears of women and children, which were mainly girls and children dropping out of schools, and some problems of mingling in collective housing or IDPs Hosting Sites such as sexual assaults. Another fear was the dread of becoming victims of random airstrikes that might target the areas where they live in.
- The results of the study show that the role of the local authority is limited to urban planning and tax reforms. It is clear that the local authority plays some role in organizing the process of receiving IDPs, finding assistance from organizations and disbursing aids. However, the local authority should pay more attention to IDPs' humanitarian crisis and solving their problems.

8. Summary of Assessment

District	Number of presence CBOs	Supplier				Financial Points	Average Rent Rate
		household items	Furniture	Clothes	Shelter materials		
Alhymh Aldakhlyh	0	3	3	5	6	6	13148
Alhymh Alkharjyh	0	1	4	4	1	2	8000
Arhba	1	5	5	6	6	1	16129
Attyal	0	0	0	0	0	2	8250
Bani Hshysh	0	3	3	5	9	3	10880
Bani Mtr	1	6	3	6	5	11	38077
Bilad Ar Rus	0	0	0	0	0	0	19560
Hamdan	6	7	6	5	5	4	9263
Jhanh	0	0	0	1	3	5	2868
Khwlān	0	5	5	5	5	3	19769
Sanhan	6	5	5	5	5	2	12206
	14					39	

Annexes:

Annex (1): Assessment Maps

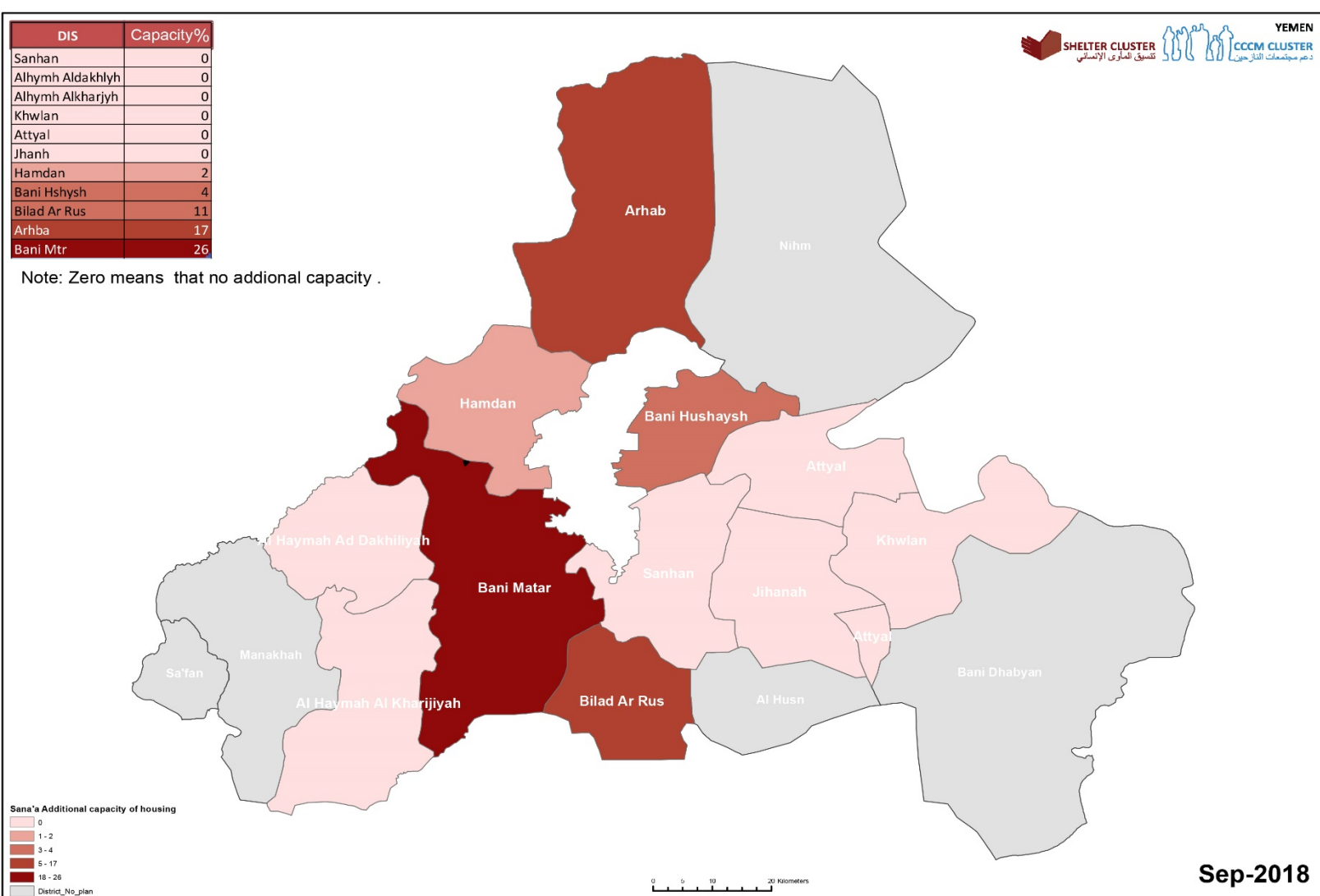
Annex (2): Community Based Organizations

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:

Agriculture - Charity, 360
Charity, 359, 361-362, 366
Development, 354-355, 357, 363
Development-charity, 358, 364-365
Health - Charity, 367
Relief, 356

Validity of license

Not valid, 354, 356-358
Valid, 355, 359-360, 362, 364-365, 367

Bank Accounts

Available, 354, 356-362, 364-367
Not Available, 355, 363

Section 2: Financial points-Exchangers and remittance agents.

Al-Amal Bank

Al-Kuraimi Exchanger

Section 3: Voucher based suppliers.

Type of Goods are provided by Vendors:

Cloths, 2038,2040,2041,2054,2055,2058,2063,2067,2070,2076,2084,2092,2095,2100,2110, 2116-2118,2122-2124,2129,2133,2137,2139,2147-2152,2160,2162,2164,2167,2169, 2179-2183,2191,2200
Furniture, 2040,2045,2057,2059-2061,2081-2083,2088,2089,2098,2106,2109,2112, 2119-2121,2135,2140,2141,2154,2155-2157,2161,2163,2170-2175,2193,2194,2196
Shelter Material , 2042,2043,2046-2048,2050-2052,2056,2062,2068,2069, 2072-2075,2077-2080,2085,2086,2099,2101-2105,2111,2113,2127,2128,2130-2132,2134, 2142-2144,2159,2166,2168,2176-2178,2184,2185,2197-2199,2201
Household items, 2039,2044,2049,2052,2053,2064-2066,2071,2087,2090,2093,2096,2097,2107, 2108,2114,2115,2125,2126,2136,2138,2146,2153,2154,2158,2159,2161-2163,2165, 2186-2190,2192,2195

Previous experience in voucher program:

Available: 2038,2040,2045,2047-2049,2052,2056,2069,2074,2078,2084,2085,2089-2091,
2123,2139,2166,2171-2173,2185,2194

Not Available: 2039,2041-2044,2046,2050,2051,2053-2055,2057-2073,2075-2077,
2079-2083,2086-2088,2092-2122,2124-2138,2140-2165,2167-2170,2174-2184,2186-2193,
2195-2201

Willingness to respond in emergency:

Willing: 2038-2045,2047-2053,2055-2061,2063-2075,2078-2085,2087-2091,2093-2101,
2103-2114,2116-2146,2148-2159,2161-2201

Not willing: 2046,2054,2062,2076,2077,2086,2092,2115,2147,2160,2200