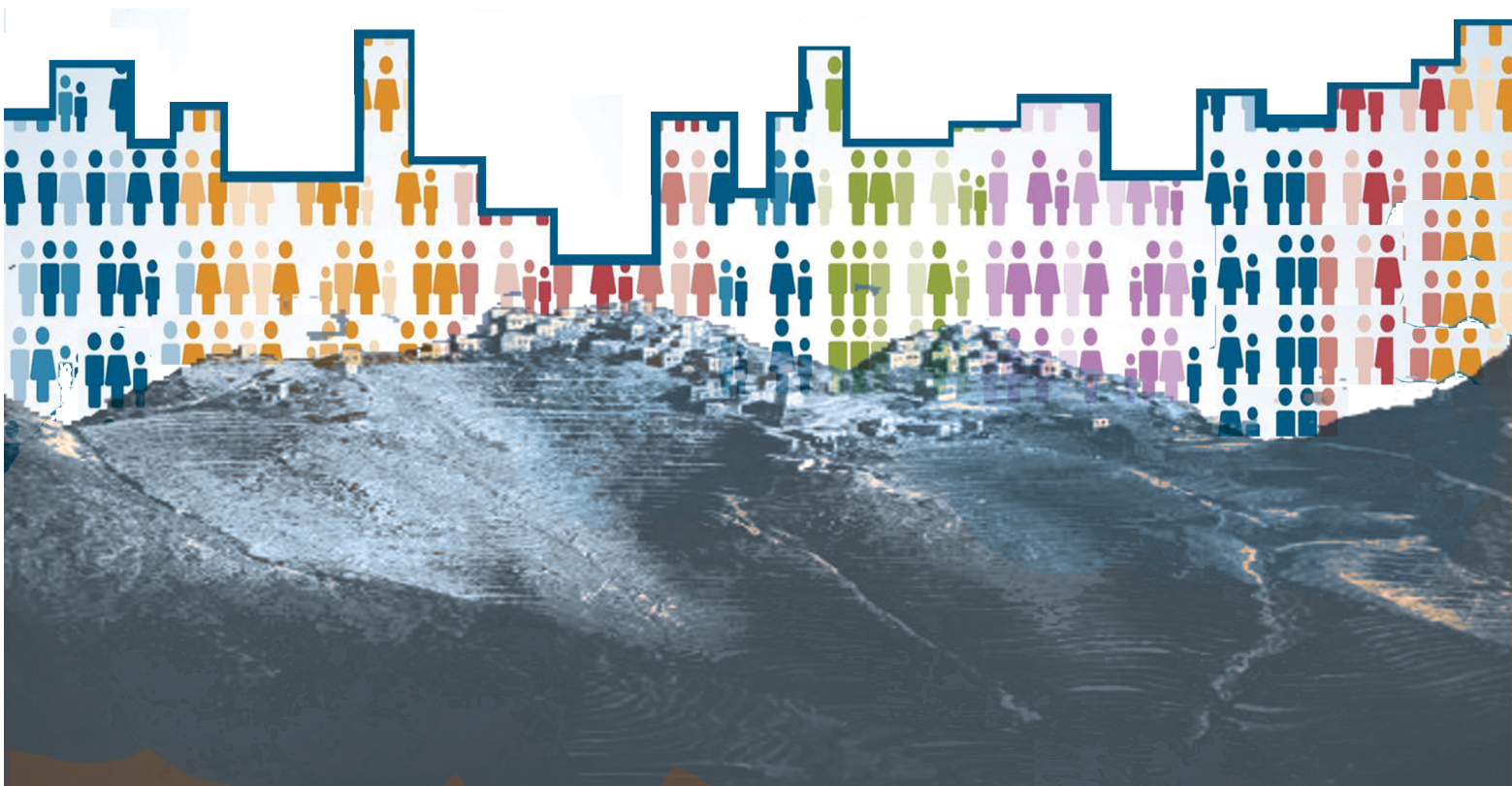


Yemen Shelter/NFI/CCCM Cluster Housing

Rental Market Assessment

September 2018

Shabwah Governorate



SHELTER CLUSTER
تنسيق المأوى الإنساني



CCCM CLUSTER
دعم مجتمعات النازحين

YEMEN



YHF

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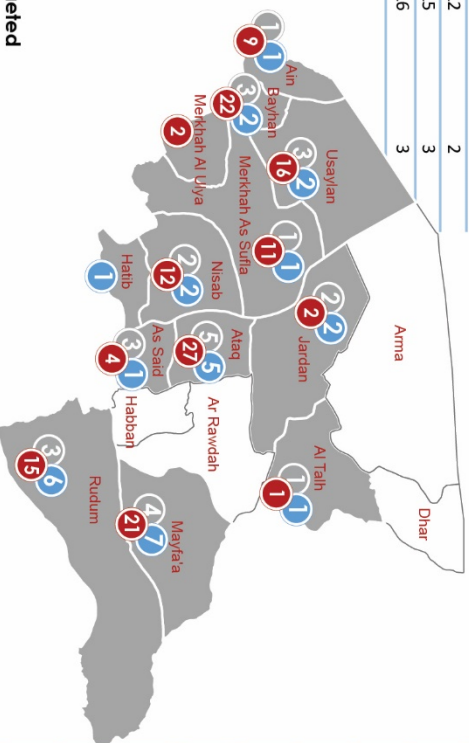


The Samples of The assessment



CBOs, Suppliers, and Financial Points Sample

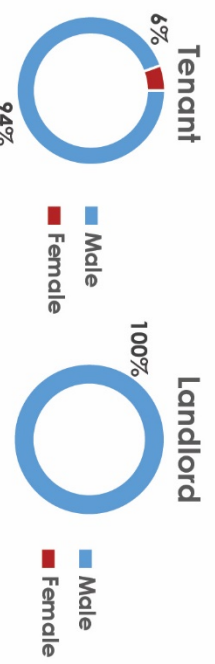
Districts Name	CBOs	Suppliers	Financial Points
Ain	1	9	1
Al Tahl	1	1	1
As Said	1	4	3
Ataq	5	27	5
Bayhan	2	22	3
Hatib	1	0	0
Jardan	2	2	2
Mayfa'a	7	21	4
Merkhah Al Ulya	0	2	0
Merkhah As Sufia	1	11	1
Nisab	2	12	2
Rudum	6	15	3
Usaylan	2	16	3



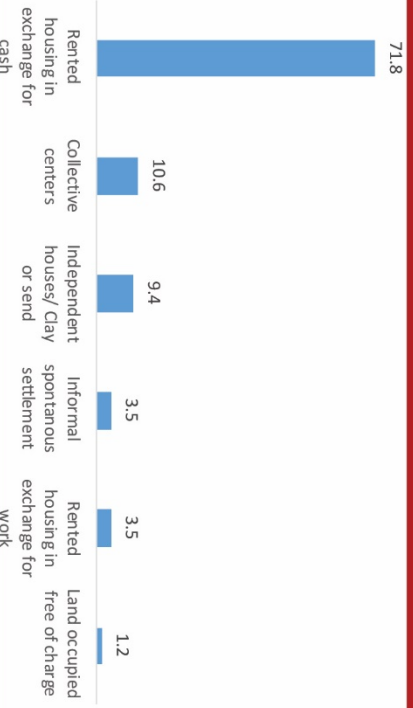
* The other districts are not targeted



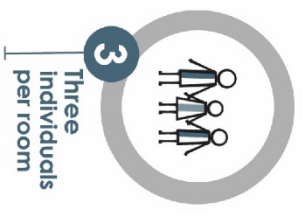
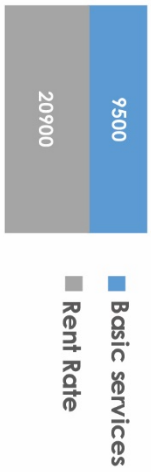
Gender



The Majority of Housing Inhabited by the IDPs



Income and Expenses and The Crowding Index



Introduction

General Information about the Governorate:

Shabwah Governorate covers an area of 47,728 km² (18,428 sq. mi). Its population, according to the 2004 Yemeni census, is “470,440”. The number of IDPs in the Governorate has reached (27,954) 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 Shabwah Governorate

The districts distributed among the targeted sample of Shabwah Governorate are 13: Ain ,Al-Talh ,Ar Rawdah ,Arma ,As Said ,Ataq ,Bayhan ,Dhar ,Habban ,Hatib ,Jardan ,Mayfa'a ,Merkhah Al Ulya ,Merkhah As Sufla ,Nisab ,Rudum ,and Usaylan .However ,Al Talh, Hatib, and Merkhah Al Ulya are desert areas and there were no tenants occupying those areas.



Section 1: Rental Market Housing Assessment

1. Demographic Details

1.1 Targeted Districts

The results of the tenants' sample analysis in Shabwah Governorate shows that tenants were distributed to Shabwah's districts as shown in Figure (1).

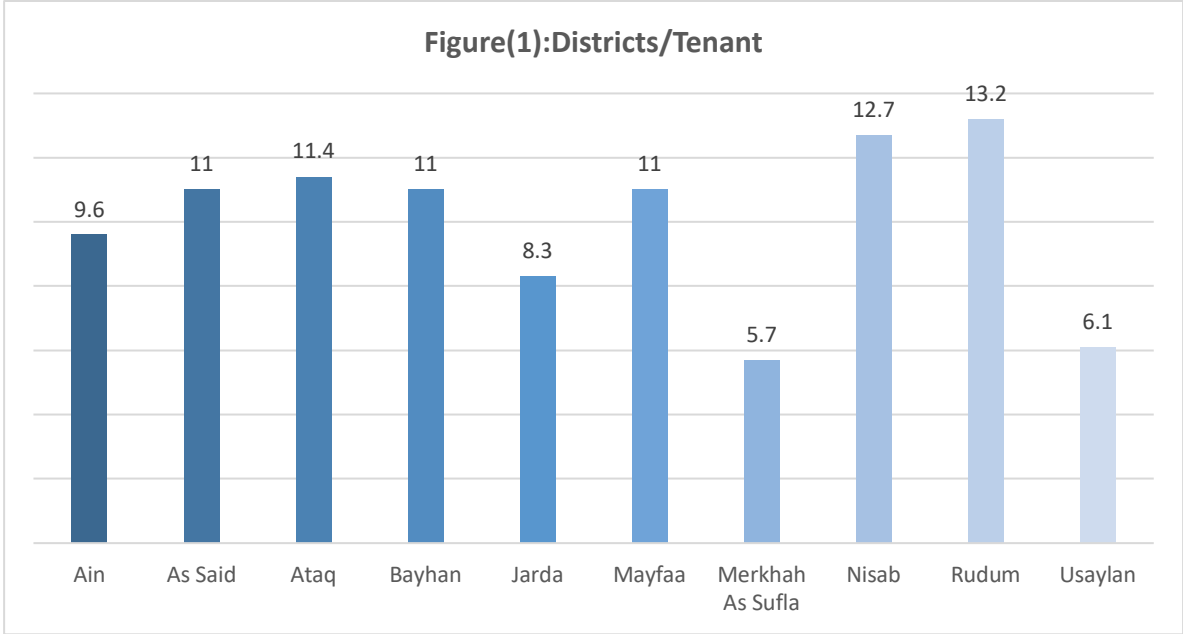
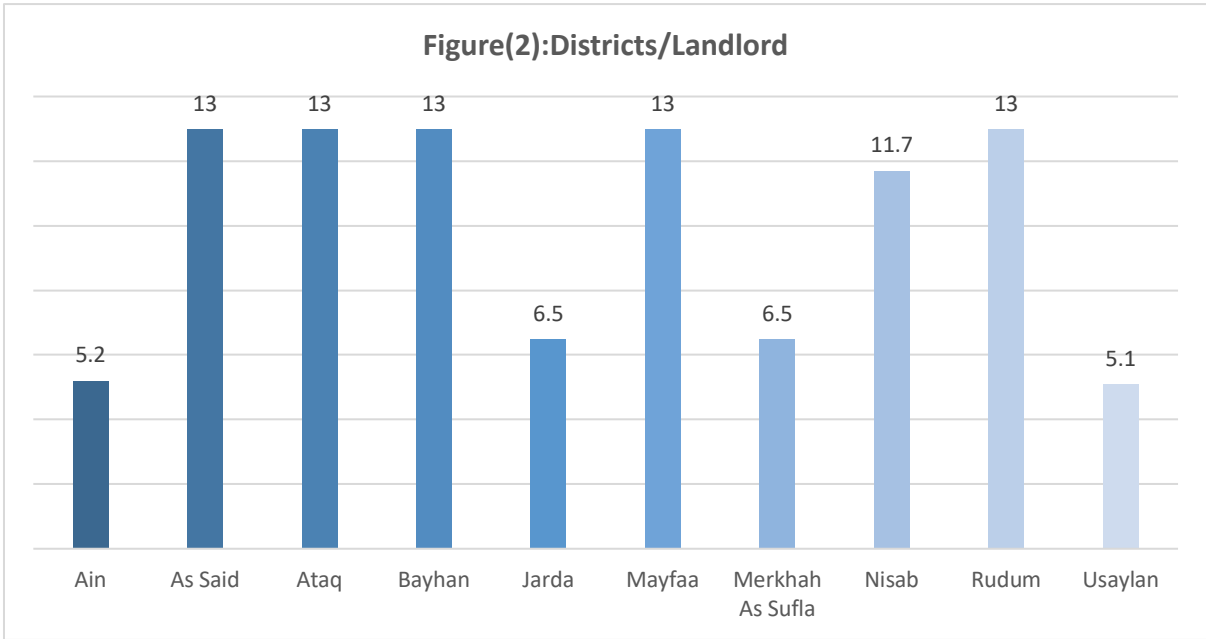
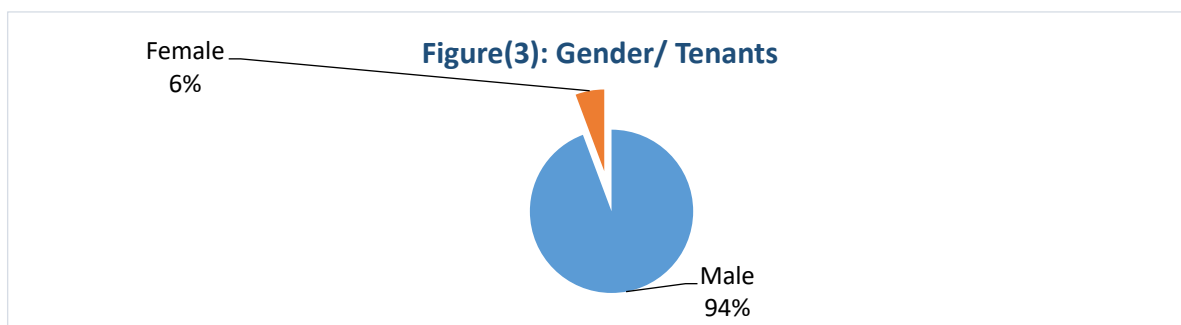


Figure (2) shows the results of the landlords' sample analysis in Shabwah Governorate, the districts were distributed as shown in the figure below.



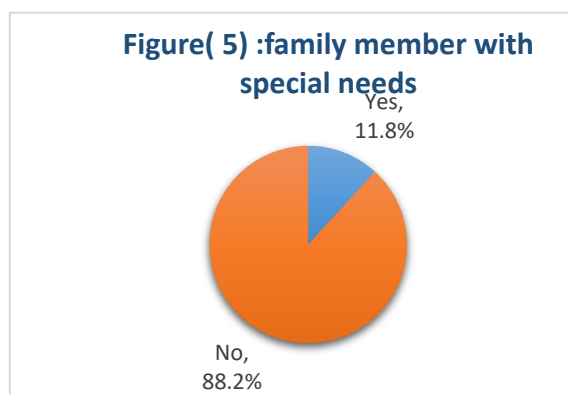
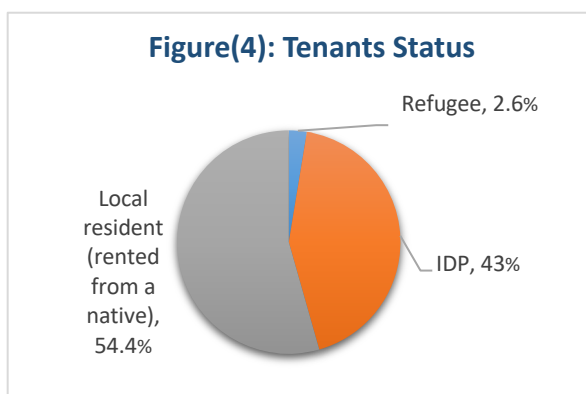
1.2 Gender (Landlords / Tenants)

Figure (3) shows the gender distribution of tenants, 94% were male tenants and by 6% were female tenants. Whereas landlords gender distribution was 100% male landlords.



1.3 Tenant Characteristics

The results of the tenants' sample analysis show that 54.4% of tenants were local residents of the same area (Figure 4), 2.6% were refugees, and 43% were IDPs tenants, which reflects the size of IDPs presence in this area. The study also shows that 11.8% of tenants have family members with special needs (Figure 5).



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: 39.25% over 18 years to 55 years, and 35.42% over 5 years to 18 years, 22.19% less than 5 years old, and 3.14% of family members over 55 years. And according to the results of the analysis, the gender of the tenants is 53.02% males and 46.98% 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): Tenant and Gender of Tenants and their Families

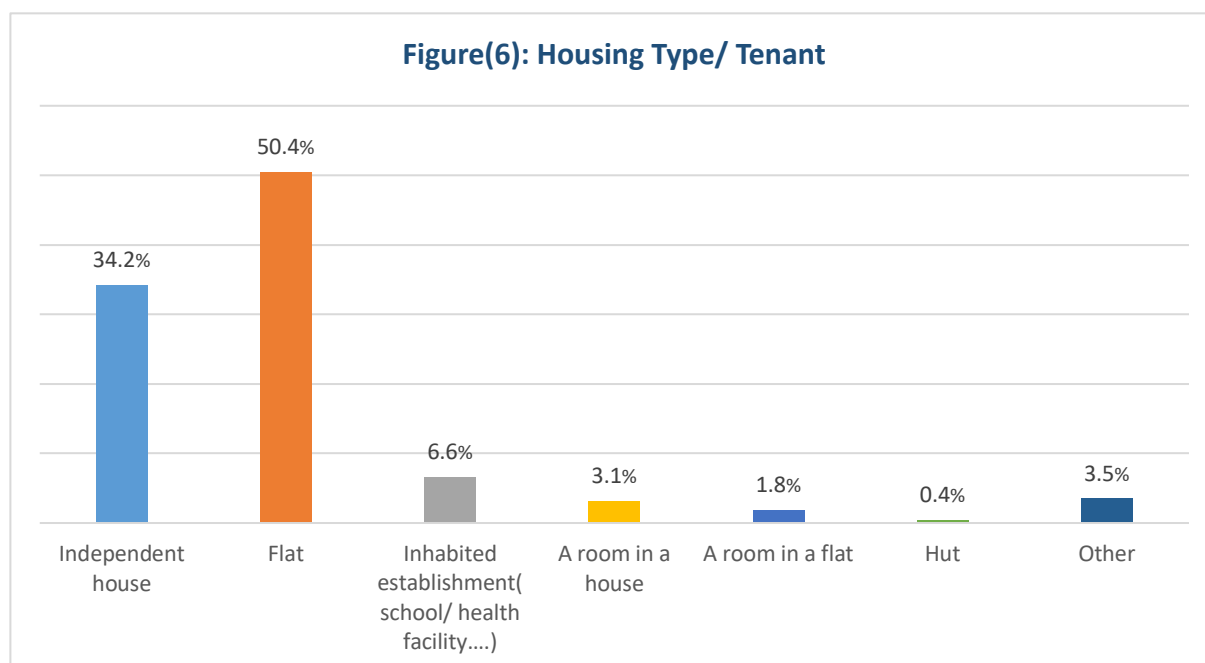
Gender	Less than 5 years		from 5-18 years		More than 18-55 years		More than 55 years		Total number of members in the households	
	Number	%	Number	%	Number	%	Number	%	Number	%
Male	230	55.96	352	53.66	379	52.13	21	36.21	982	53.02
Female	181	44.04	304	46.34	348	47.87	37	63.79	870	46.98
Total	411	100	656	100	727	100	58	100	1852	100.00
%Within age	22.19%		35.42%		39.25%		3.14%		100%	

HHs=Households

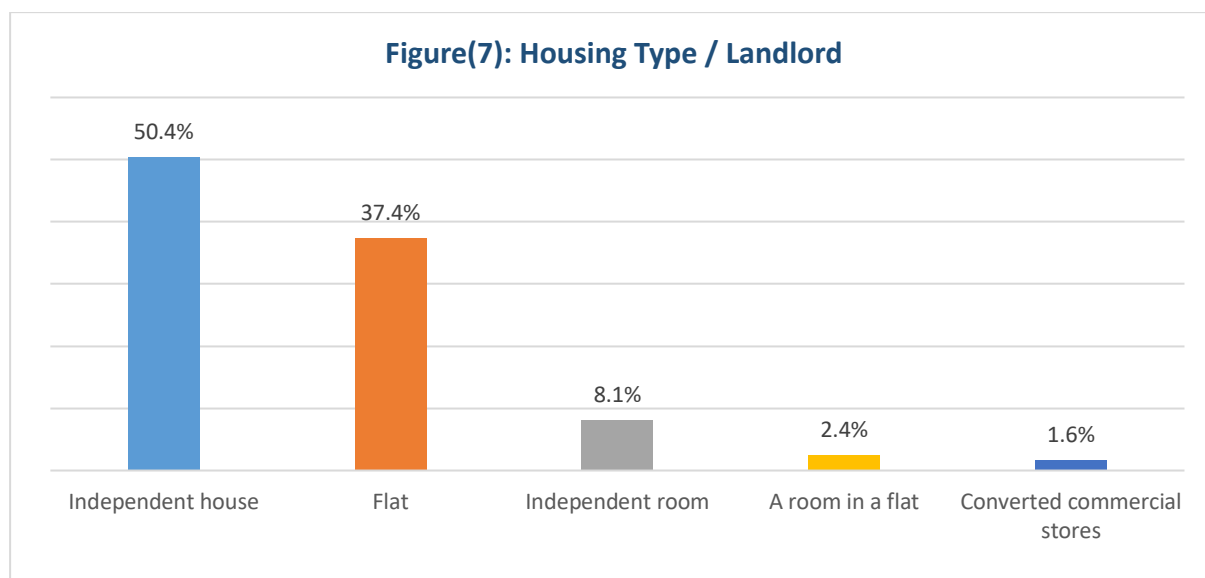
2 Details of the Rented Housing

2.1 Type of Housing (Tenant / Landlords)

The study shows rental housing available in Shabwah Governorate. 50.4% flats, 34.2% independent housing, 6.6% inhabited facilities, 3.1% a room in a shared housing, 1.8% a room in a flat, 0.4% lived in huts, and 3.5% was categorized as other (Housing made of clay) Figure (6).



In the same context, landlords' mentioned that the predominant housing available for rent are: independent housing 50.4%, flats 37.4%, a room in a shared housing 8.1%, and a room in a flat 2.4%, Figure (7).



The results of the analysis of the FGDs and KII of both genders confirm that the majority of rented housing available in the area are flats, old clay housing, tents, huts, abandoned lands, and housing in government buildings.

2.2 Rent for IDPs

The results of the landlords' analysis (Figure 8) show that 44.2% of the landlords have already rented housing for IDPs, and 55.8% have not rented housing for IDPs. As for accepting to rent to IDPs, 100% of landlords confirmed the willingness to rent their housing to IDPs. The high percentage of landlords who already rented to IDPs and those who confirmed their willingness to rent to IDPs indicates that there are no restrictions on renting to IDPs or any kind of discrimination against IDPs in Shabwah Governorate.

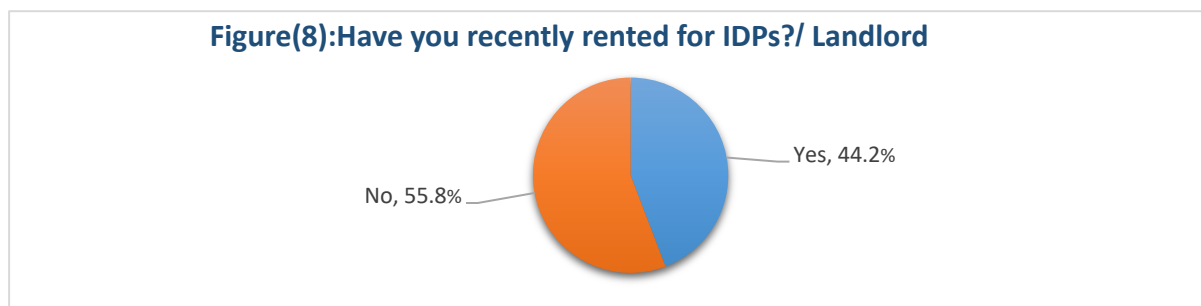
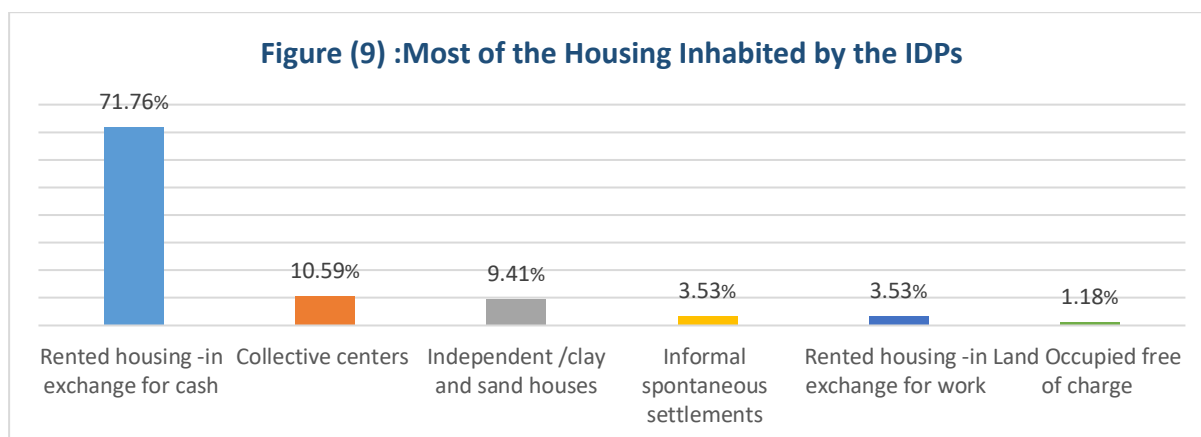
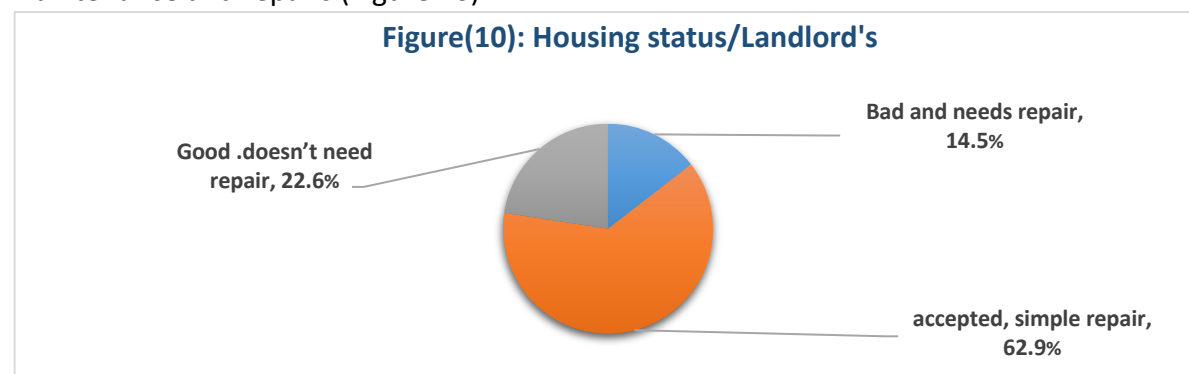


Figure (9) illustrates the types of housing rented by IDPs. 71.76% of IDPs tenants rented housing in exchange for cash, 10.59% lived in collective centers, 9.41% lived in independent housing (clay/sand), 3.53% rented housing in exchange for labor (working for landlords instead of paying rent money), 3.53% lived in informal spontaneous settlements, and 1.18% occupied lands (rent free).



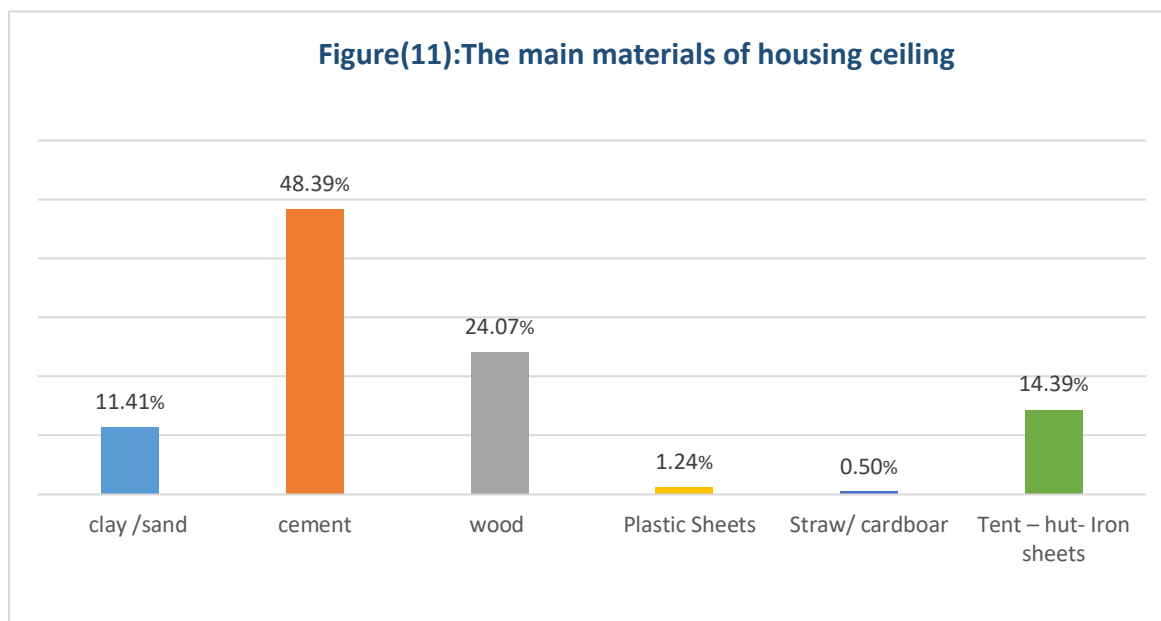
2.3 State of Housing

The results from the landlords' sample analysis indicate that 62.9% of the housing managed by landlords are in acceptable conditions and only need minor repairs, 22.6% are in good conditions and do not require any maintenance, and 14.5% are in bad conditions and need maintenance and repairs (Figure 10).



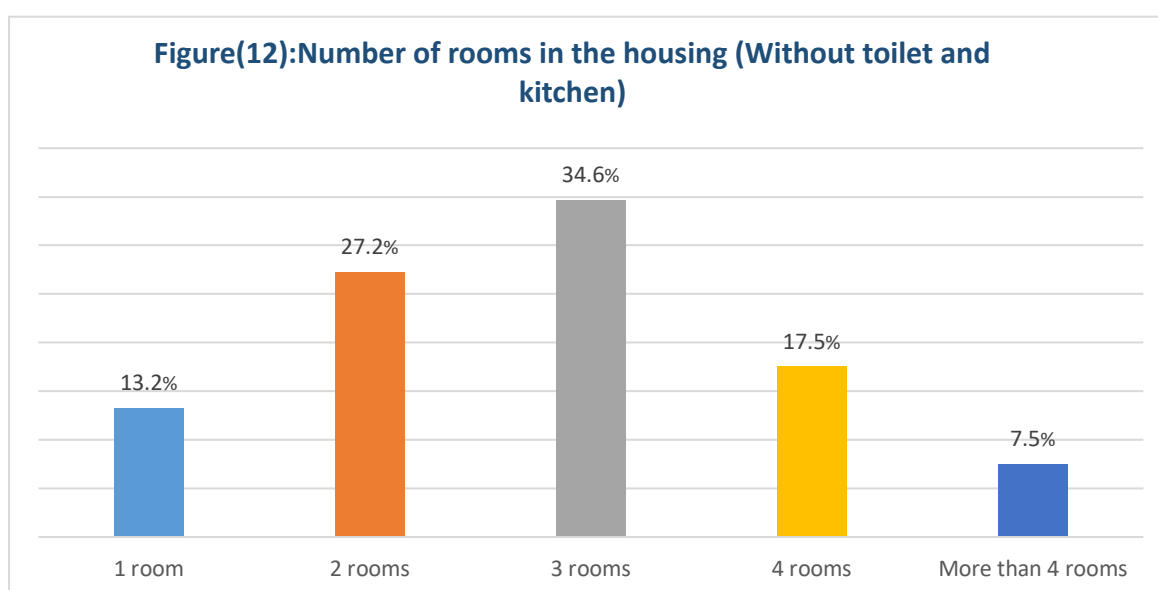
2.4 Materials used for Ceilings of Housing

Figure (11) shows that the materials used for the ceiling of the rented housings was 48.39% cement, 24.07% wood, 14.39% tent/hut/iron sheets, 11.41% clay/sand, and 0.50% straw/cartons.

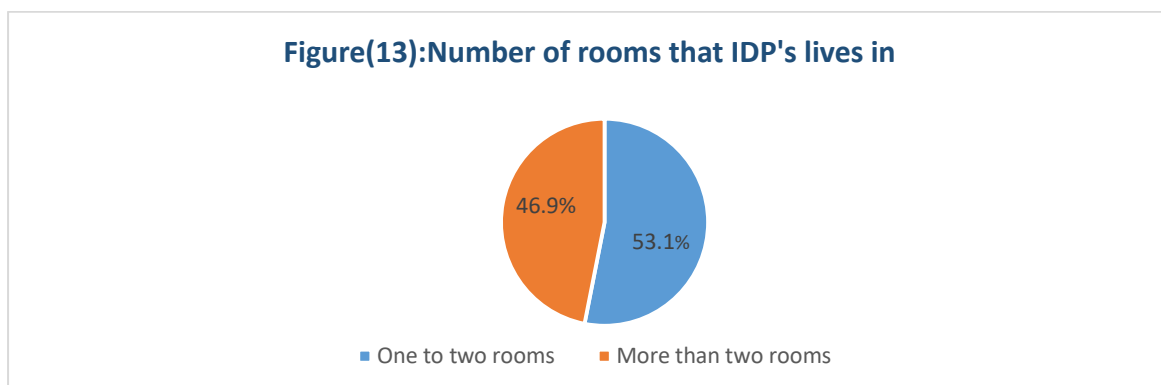


2.5 Number of Housing rooms

The results of the study (Figure 12) indicate that 34.6% of tenants live in rented housing that consist of three rooms, 27.2% two rooms, 17.5% four rooms, 13.2% one room, and 7.5% more than four rooms. The results of the analysis (Figure 14) indicate that 49.3% of tenants live in rented housing that consist of one room, 37.3% consist of two rooms, 9.8% consist of three rooms, 3.1% consist of four rooms, and 0.4% consist of more than four rooms. These results indicate that the majority of tenants live in housing that have two to three rooms. The crowding index in Shabwah Governorate shows that every two individuals share a room according to the number of household members 1852 divided by the total number of rooms 636 excluding kitchen and toilet, Table (1).

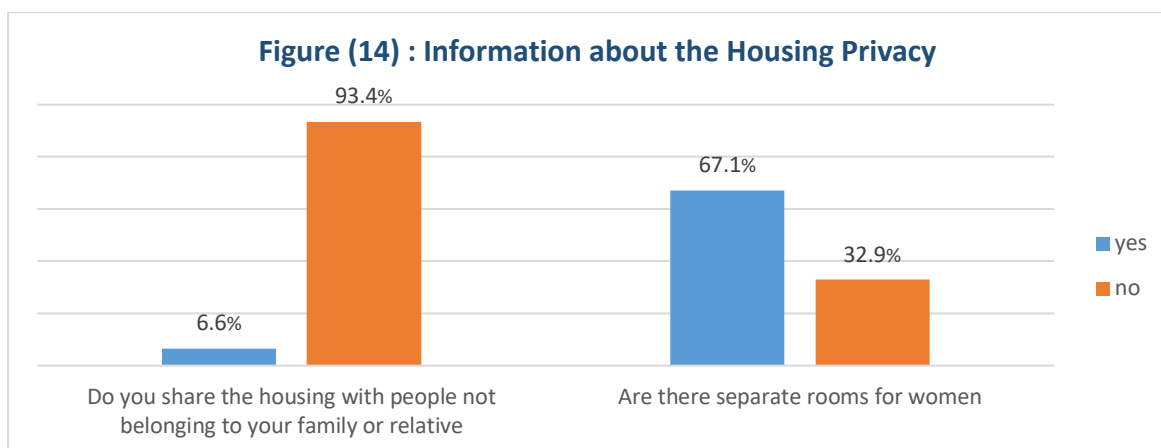


As previously mentioned, 43% of the tenants in Shabwah Governorate are IDPs (Figure 5), the study shows that 53.1% of them live in one to two rooms.



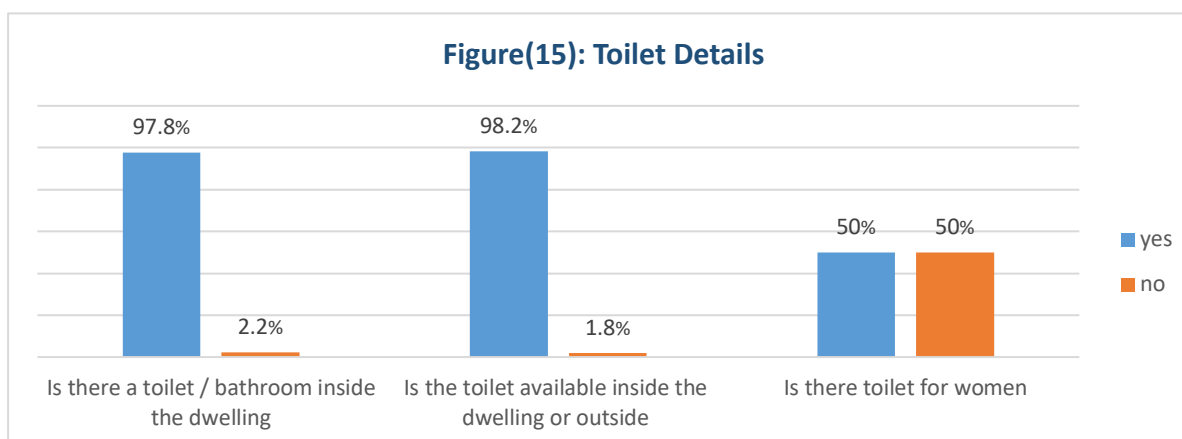
2.6 Privacy of the Housing

Figure (14) shows that 67.1% of housing rented by tenants have separate rooms for women, whereas 32.9% do not. The study also revealed that 93.4% of rented housing were not shared by any members from outside the family of the household, and 6.6% were shared, which reflects the lack of privacy for these families.



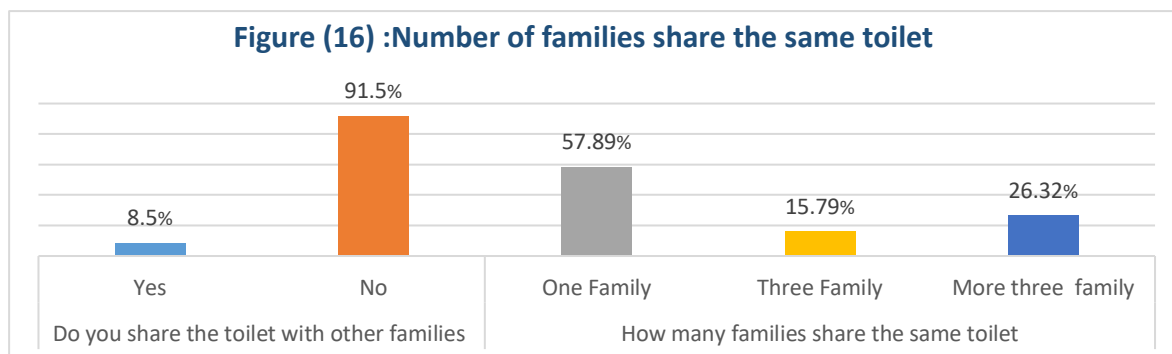
2.7 Availability of Toilets in the Housing

The results of the study sample analysis (Figure 15) show that 97.8% of housing have a toilet, while 2.2% do not have a toilet. The study also showed that 98.2% of tenants have a toilet inside the housing, whereas 1.8% did not have a toilet inside the housing. As for the

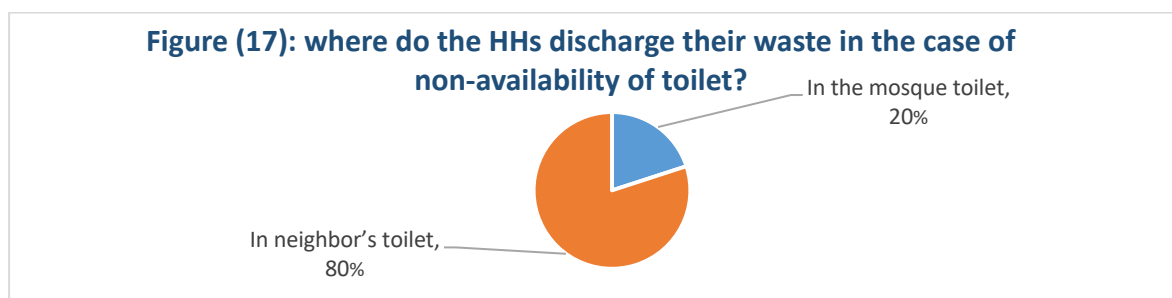


availability of separate toilets for women, 50% had separate toilets for women, and 50% did not have separate toilets for women (figure. 15).

Figure (16) illustrates whether a family shared a toilet or not, and the number of families that shared a toilet. 91.5% of tenants did not share the toilet with other families, and 8.5% shared the toilet with other families. As for the number of families that shared a toilet, 57.89% of tenants shared a toilet with one other family, 26.32% with more than three families, and 15.79% with three families. These statistics indicate the great lack of privacy that many families endure.



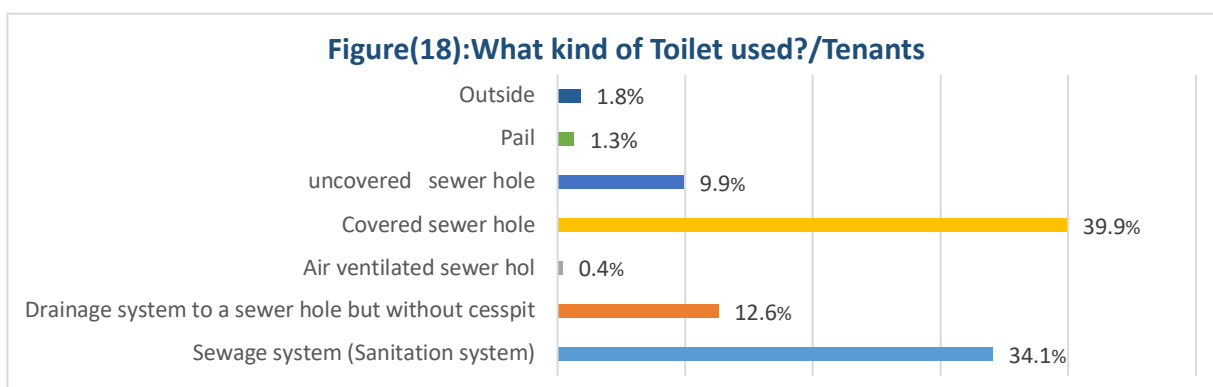
The results of the study show the alternatives tenants use in case of unavailability of toilets. 20% of tenants who do not have access to a toilet inside the housing use the mosque’s toilet, and 80% use the neighbors’ toilet, Figure (17).



2.8 Type of Sanitation System

The results of the tenants’ sample analysis indicate that 39.9% of the rented housing where tenants live in used covered cesspits, 34.1% the sanitation system, 12.6% a drainage system to a cesspit, 9.9% uncovered cesspits, 1.8% the outdoors, 0.4% ventilated cesspits, and 1.3% used pails.

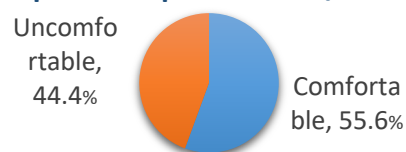
These results reflect that the types of sanitation systems used in areas where tenants live in the Governorate of Shabwah are unsanitary for both the people and the environment (Figure 18) .



2.9 Suitability of Housing for People with Special Needs

The results of the tenants' analysis indicate that 44.4% of housing are not suitable for family members with special needs, and 55.6% are suitable (Figure 19). 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.

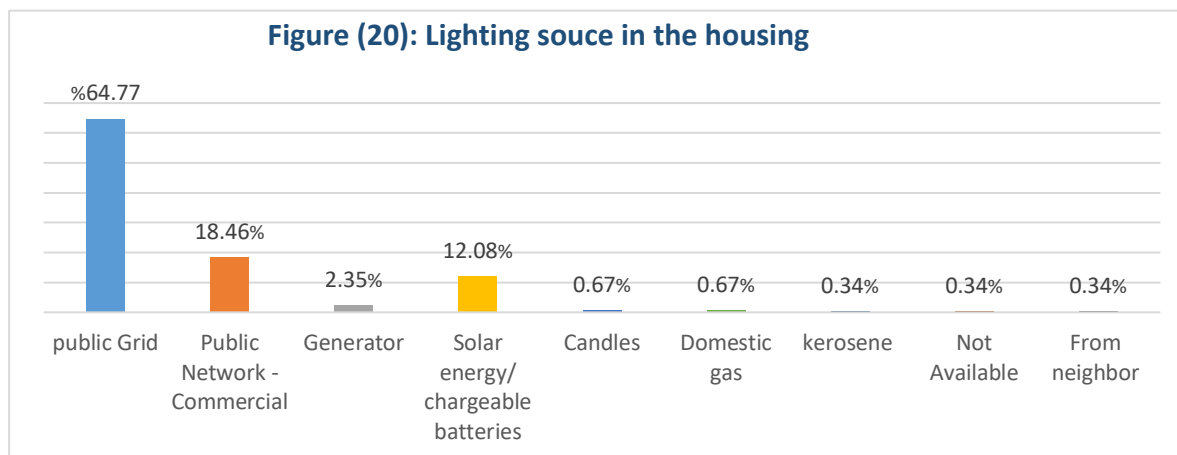
Figure (19): Suitability of housing for people with special needs/Tenants



2.10 Source of Lighting

Figure (20) illustrates the results of the tenants' analysis which show that the main source of lighting in the housing of the targeted area is the public electric grid 64.77%. Followed by: commercial electricity 18.46%, solar system and rechargeable batteries 12.08%, generators 2.35%, domestic gas 0.67%, candles 4.67%, kerosene 0.30%, unavailable source of lighting 0.30%, and 34% connect from neighbors. These results reveal that a large percentage of tenants in this area use the public/commercial electric grid as their source of lighting.

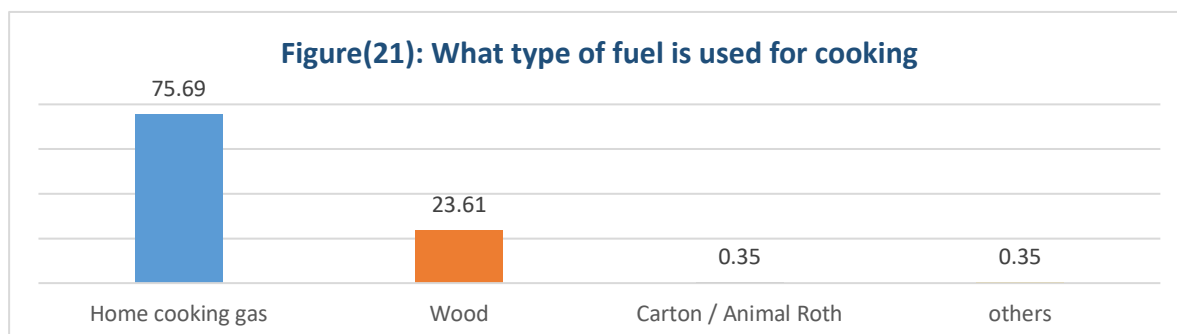
Figure (20): Lighting source in the housing



2.11 Type of Fuel used for Cooking

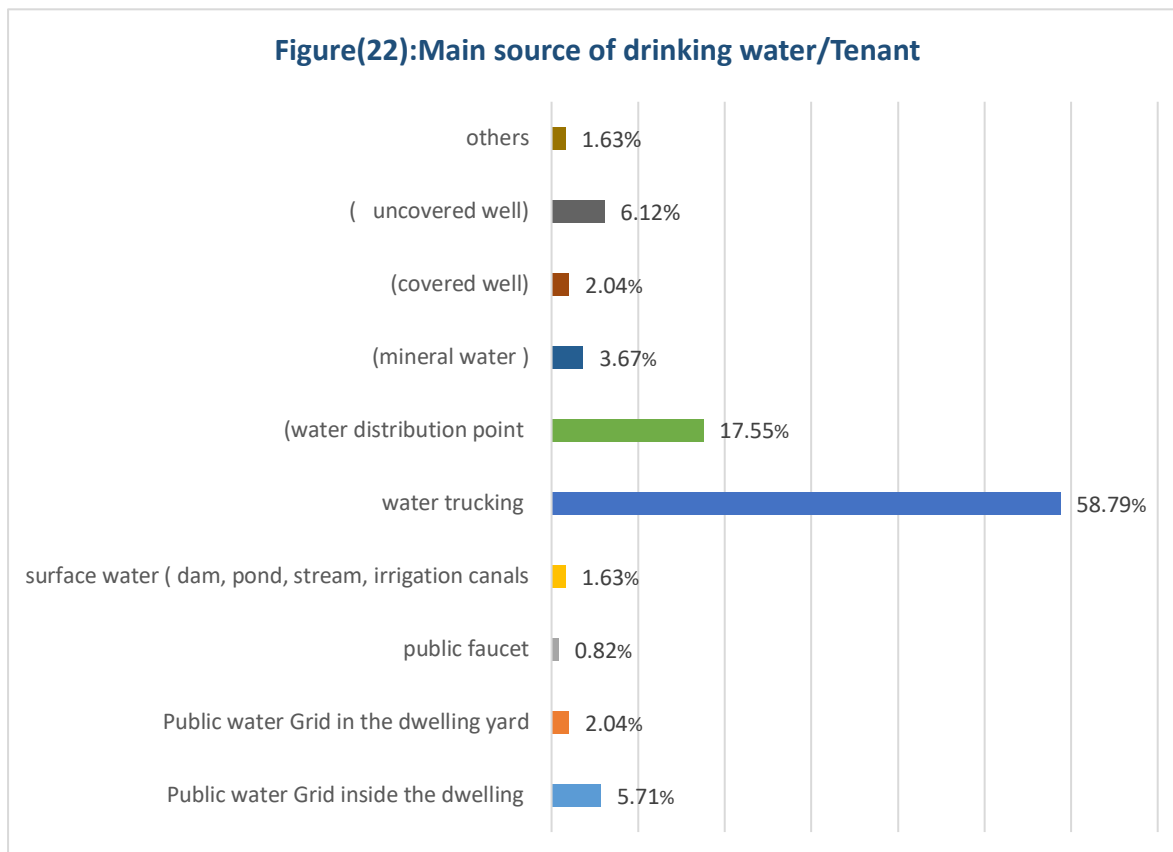
In the context of the geographical sample of Shabwah Governorate, the analysis of this study shows that 75.67% of the tenant use domestic cooking gas, 23.61% firewood, 0.35% cartons and animal Roth (animal waste), and 0.35% use other. These results reflect the difficult circumstances faced by some of the tenants, especially the IDPs who cannot afford the price of cooking gas and are forced to use firewood and other harmful sources of fuel that add an additional burden on the family in obtaining it, and which are harmful for both the people and the environment (Figure21).

Figure(21): What type of fuel is used for cooking



2.12 Source of Drinking Water

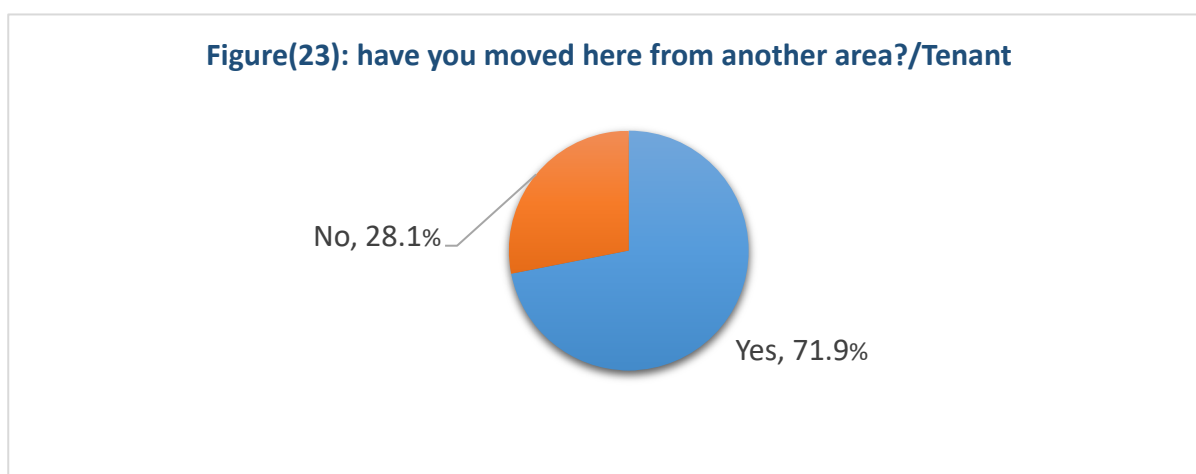
Figure (22) illustrates tenants' sources of drinking water. water trucks 58.79%, water distributions points 17.55%, surface water (dams, ponds and streams) 1.63%, mineral water 3.67%, covered wells 2.04%, uncovered wells 6.12%, public water grid inside the housing 5.71%, public water grid in the housing' yard 2.04%, public faucet project 0.82%, and other (charity points/from neighbors) 1.63%. These statistics reflect the difficulty which many tenants face in obtaining clean drinking water.



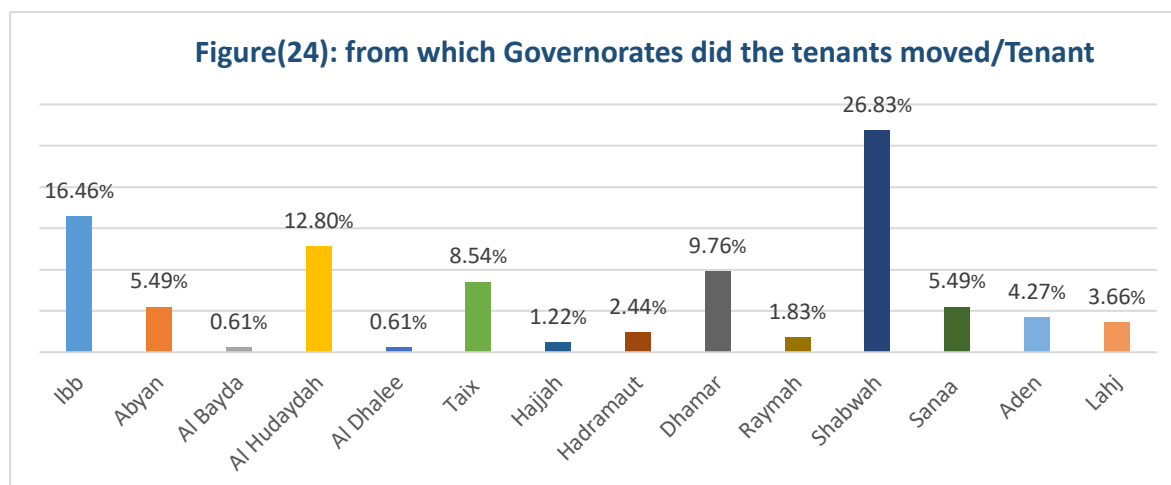
3 Accessing Housing

3.1 Transfer from Former Residence (Geographical Area):

The tenants' sample analysis reflects that 71.9% came from other areas, whereas 28.1% were local residents of the area (Figure 23). The results show that the reasons why IDPs moved to this Governorate were either because of the war or due to loss of jobs.



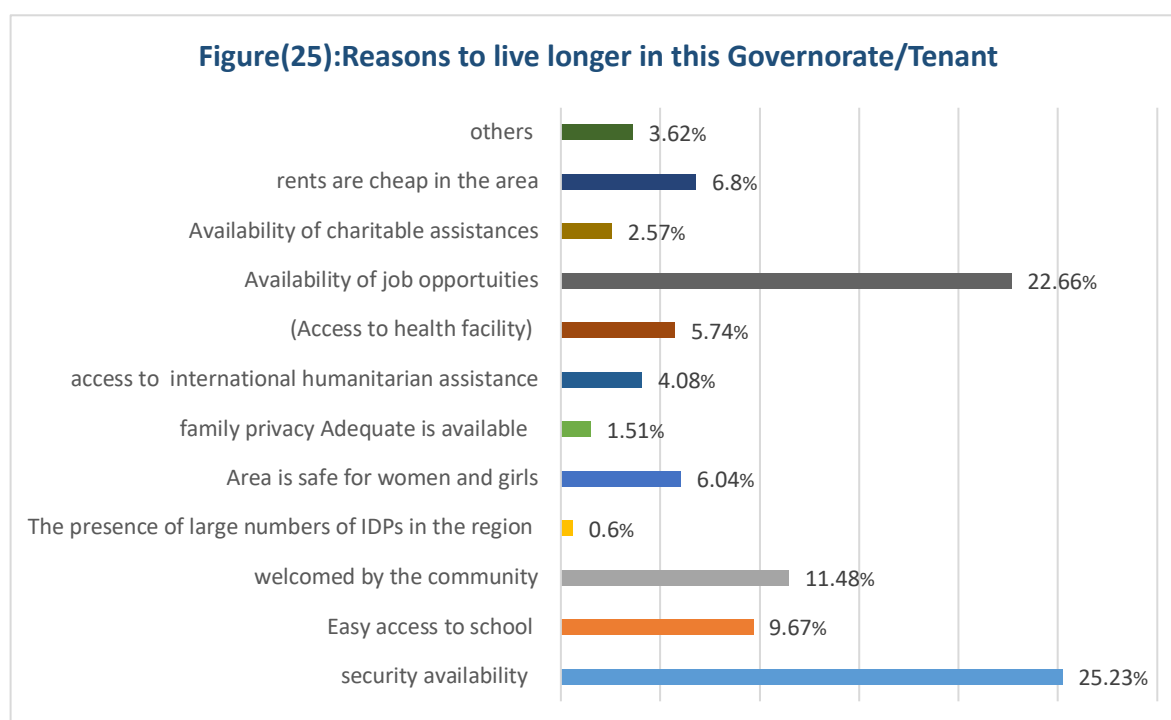
The results of the analysis illustrate the areas of origin that IDPs moved from. 16.46% of the tenants moved from Ibb, 12.80% Al-Hudaydah, 5.49% Abyan, 0.61% Al-Bayda, 0.61% Al-Dhalee, 8.54% Taiz, 1.22% Hajjah, 2.44% Hadramaut, 9.76% Dhamar, 1.83% Raymah, 5.49% Sana'a, 4.27% Aden, and 3.66% Lahj, Figure (24).



The results of the analysis of the FGDs and KII show that the influx of IDPs to this area has increased after the recent conflicts in the Governorate of Al-Hudaydah. The interviews also showed that IDPs moved from Ibb, Dhamar and Taiz.

3.2 Choosing the Governorate for Residence

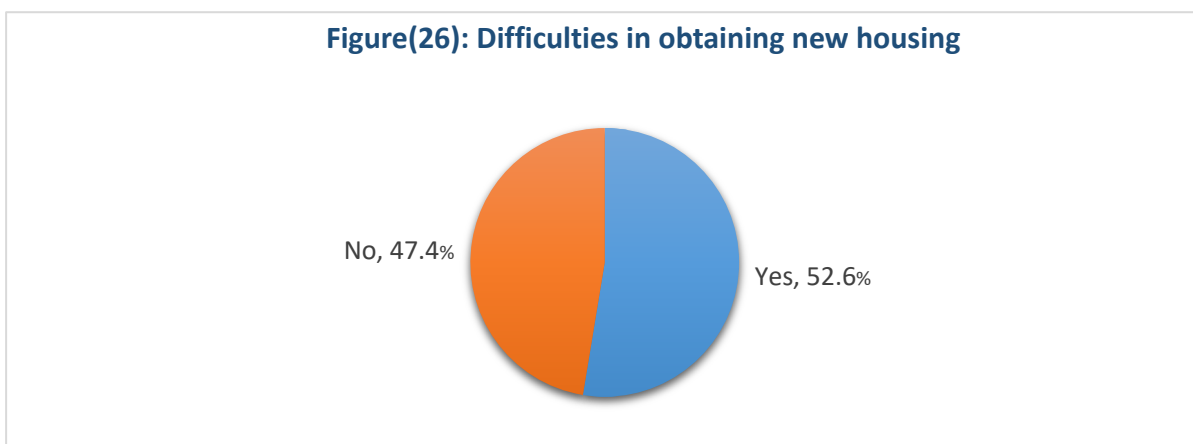
The results of the qualitative analysis of the data (Figure 25) indicate that the reasons varied for choosing this Governorate for housing, especially by IDPs. 25.23% of tenants chose to move to this Governorate for the availability of security, 22.66% availability of job opportunities, 11.48% being welcomed by the local community, 9.67% ease of access to schools, 6.04% area is safe for women and girls, and 6.8% cheap rent costs.



The results of the analysis study reflect that safety in these areas was a priority for tenants as well as affordable and cheap rent. Other reasons revealed by the study are: ease of access to international aids, availability of schools and basic services, job opportunities, and the Governorate’s proximity to areas from which IDPs moved from such as Marib, Abyan and Al-Bayda.

3.3 Difficulties in Obtaining Housing and Stability

Figure (26) shows that 52.6% of the tenants faced difficulties in finding a housing and 47.4% did not face any difficulties. The influx of large numbers of IDPs increased the demand for rented housing in a limited rental market. This was the main obstacle faced by 29.9% of the tenants. Other challenges and difficulties are as follows: 18.9% inability to pay rent, 16.9% lack of adequate housing, 1% because the head of the family is a woman, and 1% not being welcomed by the local community, Figure (27)



These results confirm the outcomes of the qualitative analysis which stated that the Governorate does not have many housing for rent. The analysis also shows the inability of poor tenants to pay rents due to lack of income which is the main challenge facing the stability in the area, especially with the lack of job opportunities.

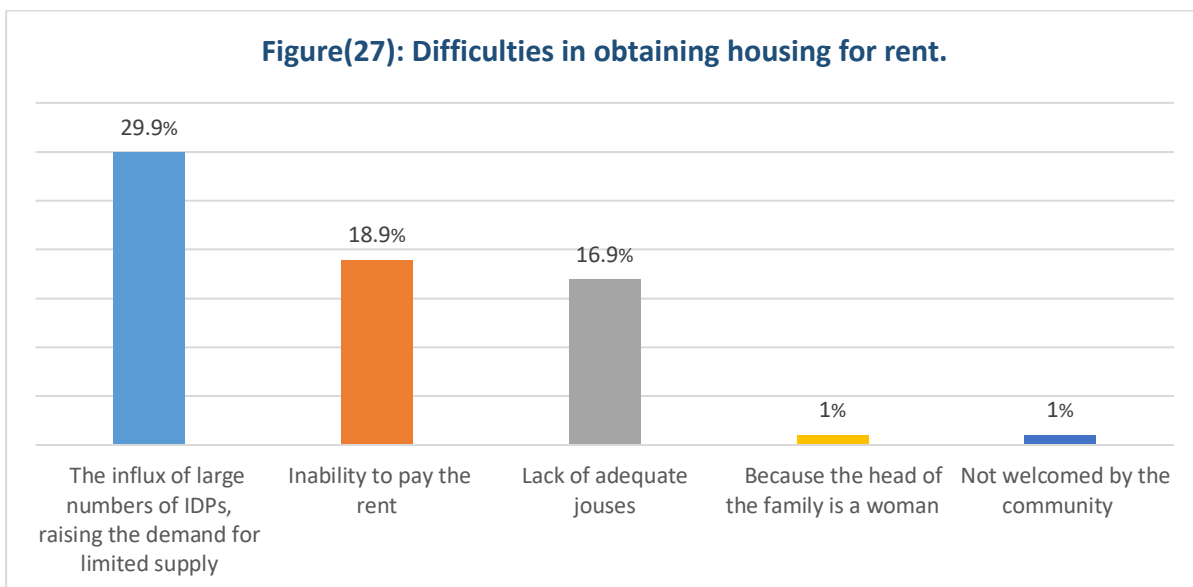


Figure (28) illustrates landlords' main challenges in the rental market. These difficulties are as follows: 23.94% high cost of rent, 23.94% high demand for housing, 16.20% high rate of non-payment, and 14.79% unavailability of rental housing. The remaining challenges are shown in Figure (28).

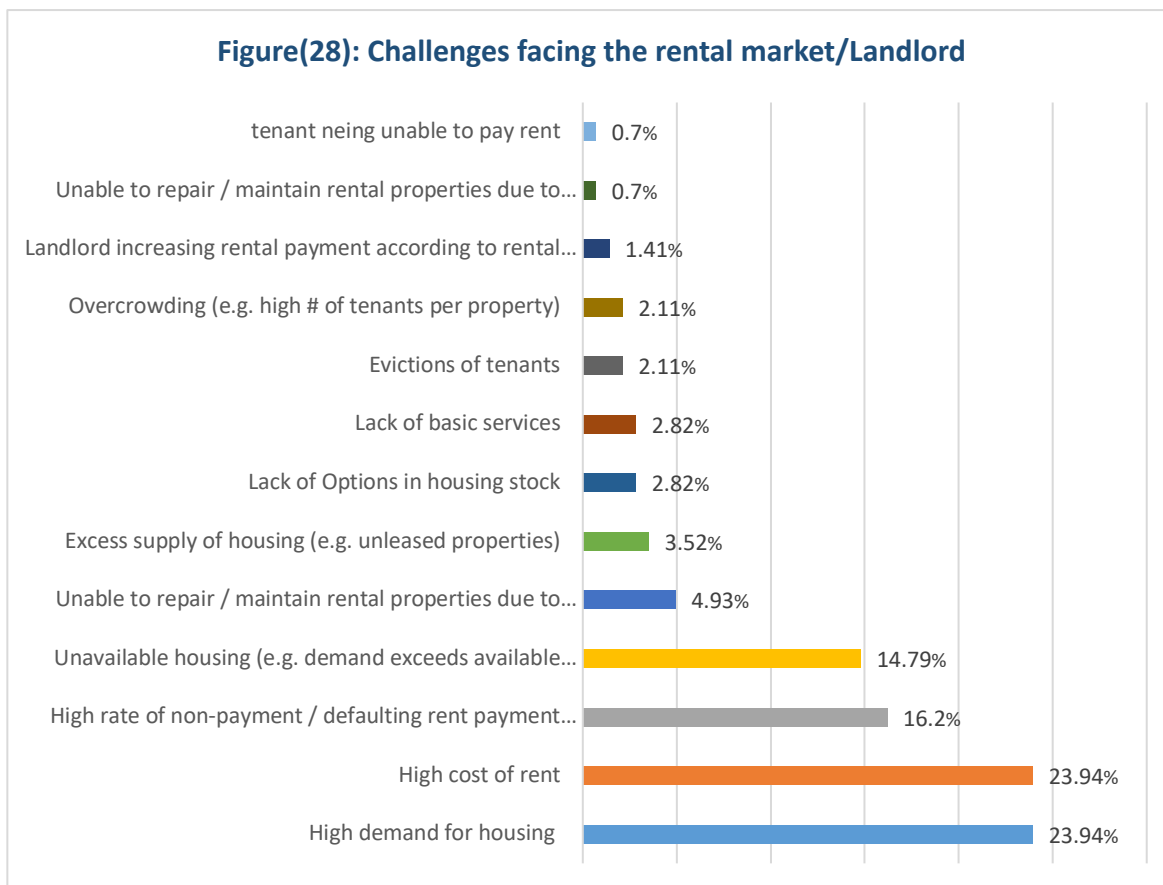
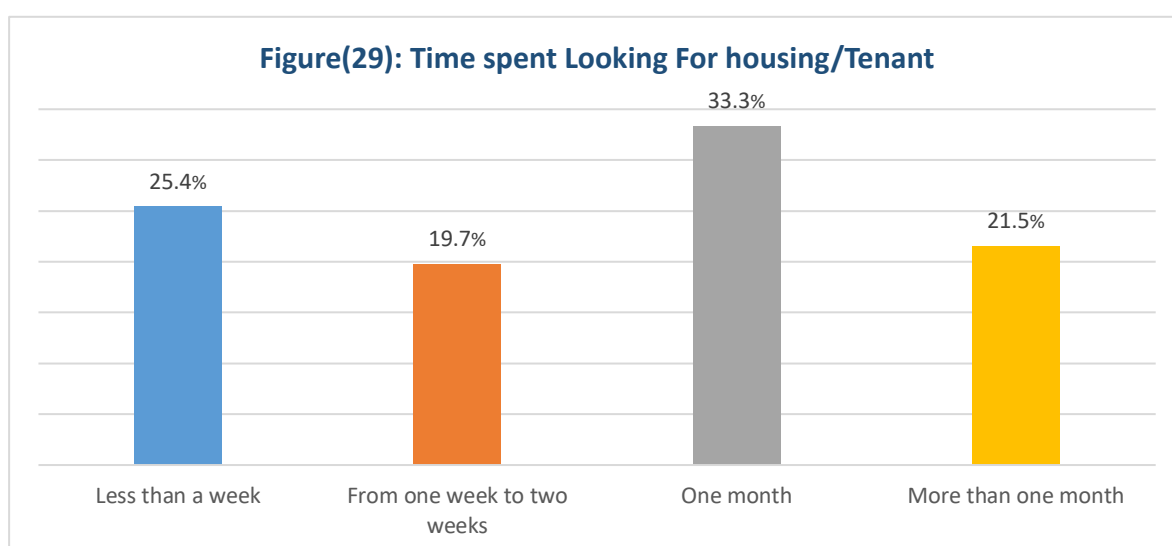


Figure (29) shows the results of the tenants' sample analysis in regards to the average time it takes tenants to find a rented housing. 33.3% one month, 25.4% less than a week, 21.5% more than one month, and 19.7% from one to two weeks (Figure 29).

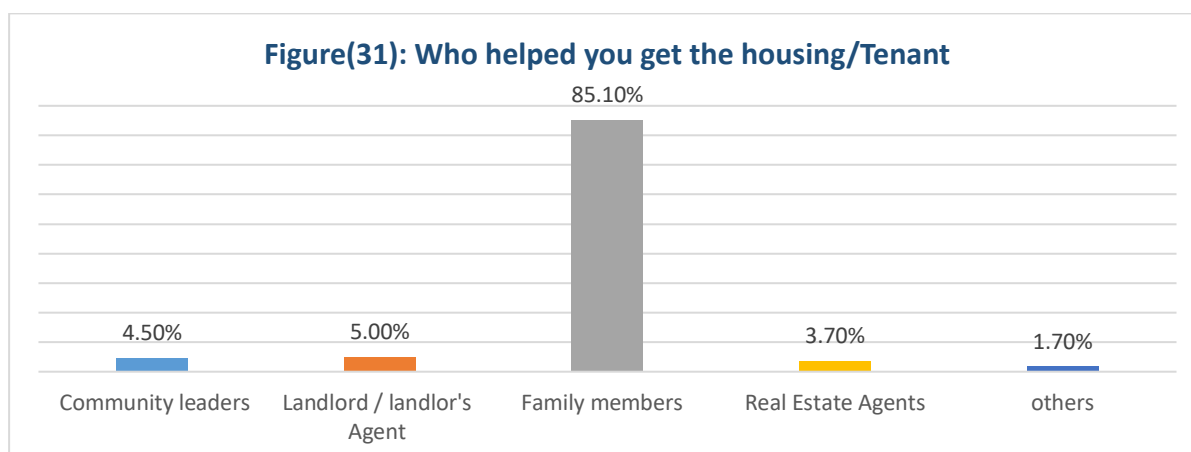


These results show how difficult it is for tenants to find a housing, especially in the absence role of real estate offices in the Governorate of Shabwah. Figure (30) shows how vacant properties are advertised according to the landlords' sample analysis: 88.24% through friends or relatives, 1.18% advertisement in the local paper, 9.41% through realtors, and 1.18% was other.



3.4 Key Agents in the Renting Market and Housing Access

Figure (31) shows that 85.10% of the tenants' sample found rented housing through family members, 4.50% community leaders, 3.70% through landlords/real estate agents, 5.00% landlords' agents, and 1.70% other (independent housing – clay housing – flats – rent free housing). The results of the study clearly demonstrate that housing' advertisement is largely done through word of mouth (family members).



3.5 Stability in the Housing

Figure (32) shows that 79.4% of tenants settled in this Governorate for over a year, 13.6% hesitated to answer because of their inability to make any decision (due to their instable financial circumstances), and 7% of tenants were unwilling to stay in the area due to high costs of rents and lack of job opportunities.

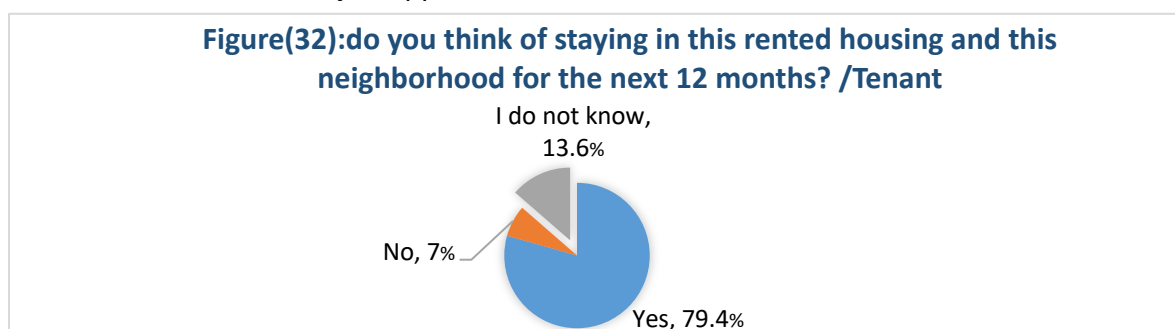
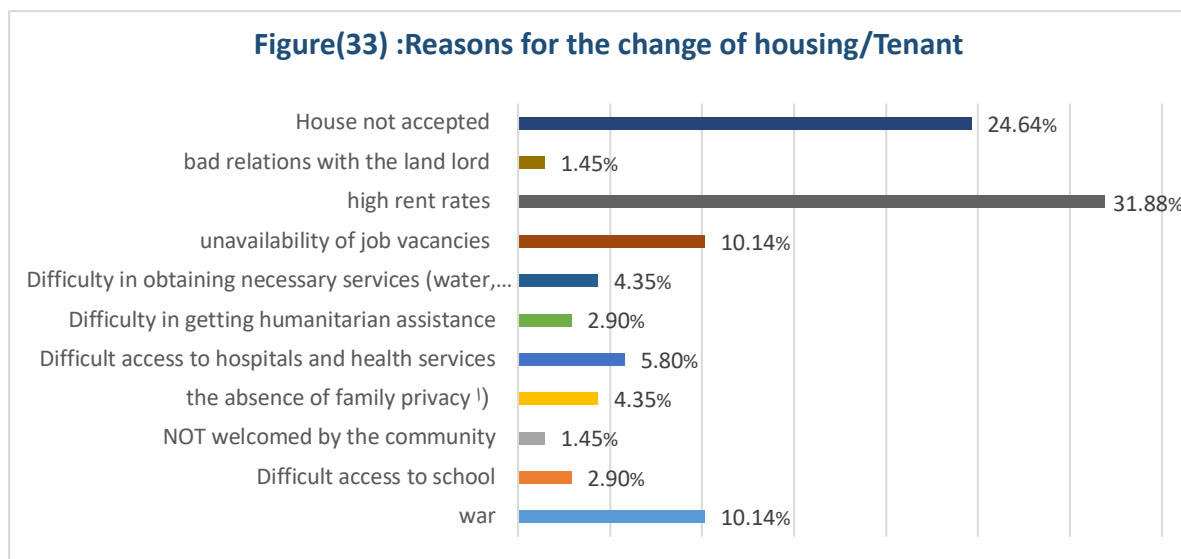


Figure (33) illustrates the reasons stated by the tenants' sample for moving from their current rented housing. These reasons are: high rent rates 31.88%, housing not accepted by tenants 24.64%, war 10.14%, unavailability of job opportunities 10.14%, difficulties accessing hospitals and health services 5.81%, absence of family privacy 4.35%, and difficulties accessing school 2.90%.

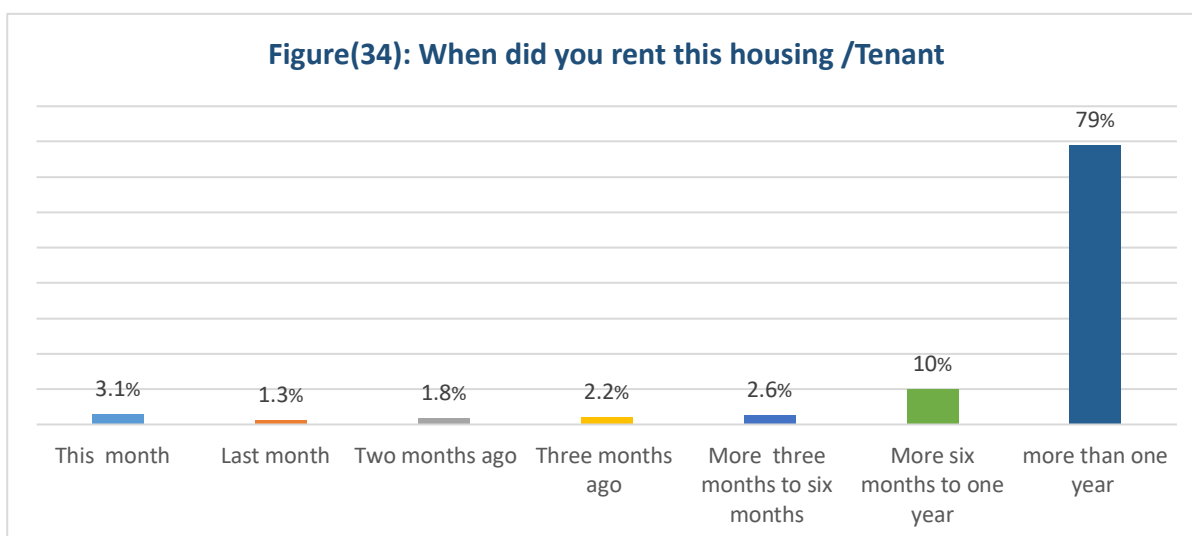


The results of the FGDs and KII's analysis confirm that most tenants moved to this Governorate because of the following reasons: safety, job opportunities, access to international aids, and the welcoming nature of the local community.

4 Rent and the Main Sectors of the Rental Market

4.1 The Rental Period of the Housing

Figure (34) shows that 79% of the tenants' sample have rented these housing for more than a year ago, 10% more than six to twelve months ago, 2.6% more than three to six months ago, 2.2% three months ago, 1.8% two months ago, 3.1% rented the housing this month, and 1.3% last month. These results show that a large percentage of tenants are former stable residents of the area, that mainly started moving to this Governorate with the beginning of the war in 2014.



The results of the analysis of the FGDs and KII of both genders confirm that most of the tenants started moving to this area in 2014 and 2015 and continue to arrive to Shabwah Governorate due to the escalating conflicts in nearby areas.

4.2 Renting Agreements

The results of the analysis of the data of the tenants (Figure 35) indicate that 87.3% of the tenants have verbal rental agreements, 3.9% written agreements but not legalized by the local police, 4.4% no agreements (rent free housing), and 4.4% are official and legal written agreements. These results confirm the landlords' data analysis that states that most rental agreements in the Governorate are informal/verbal agreements. This clearly shows that the rental market in the Governorate is not governed by formal contracts/legal agreements.

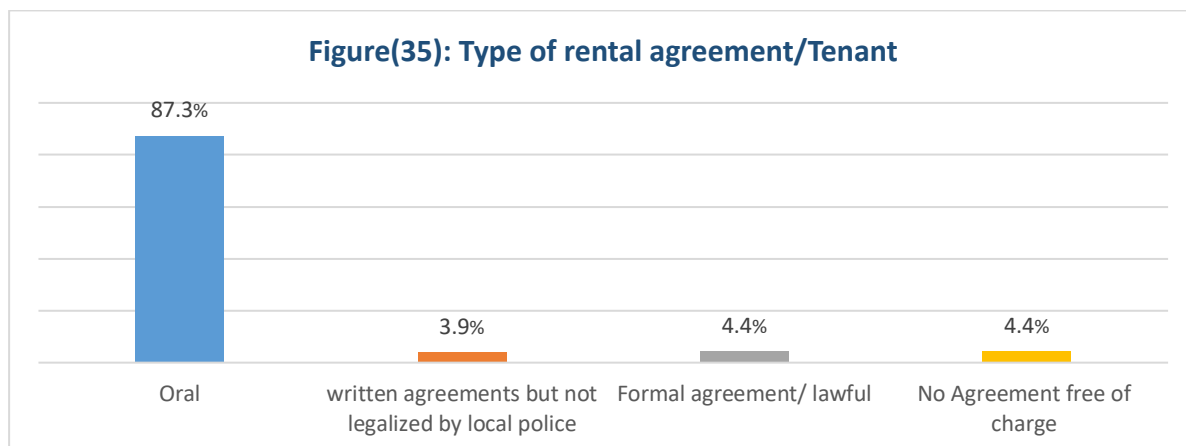
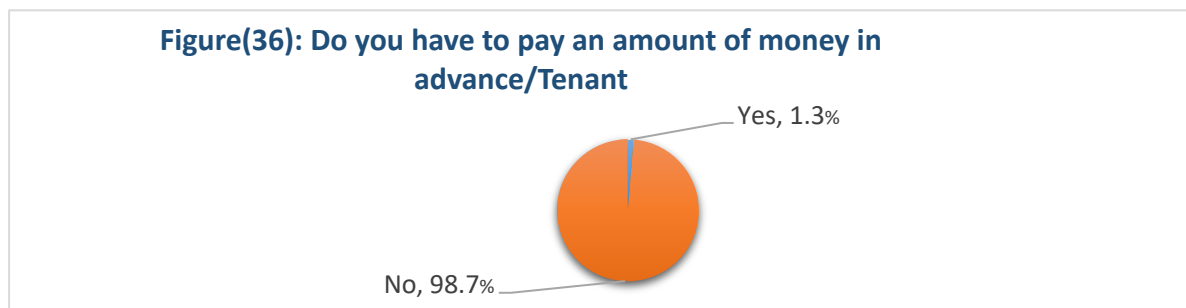
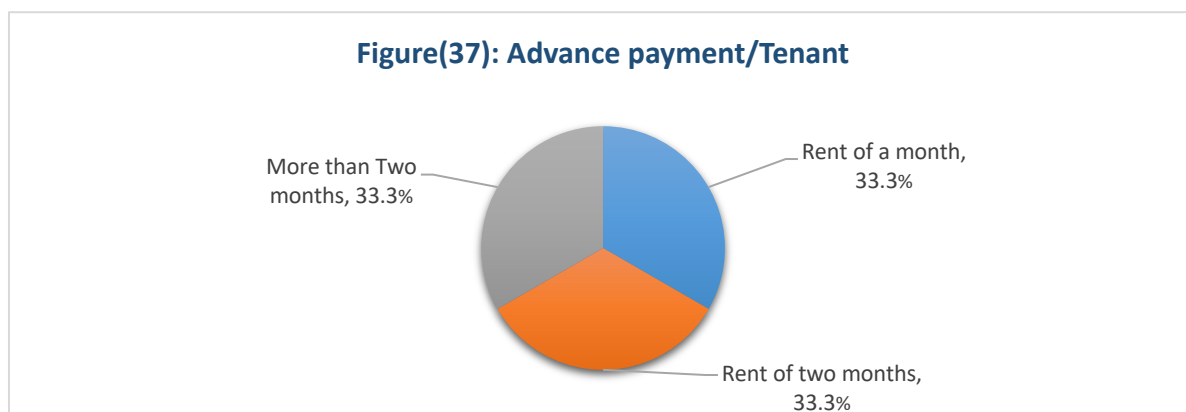


Figure (36) shows that 98.7% of tenants are not obligated to make an advanced payment in the rental agreement, whereas 1.3% have to pay a certain amount of money in advance.

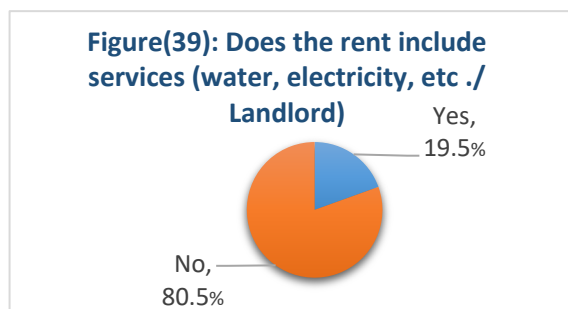
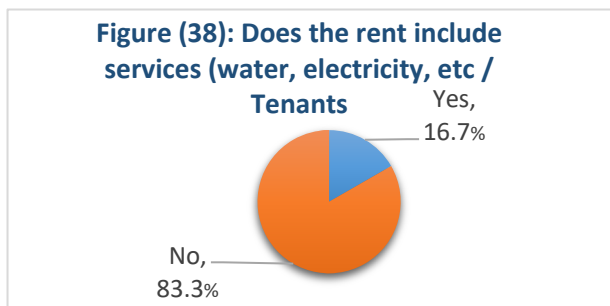


The details of the advanced payment are as follows: one month's rent 33.3%, two months' rent 33.3%, and more than two months' rent 33.3%, Figure (37).



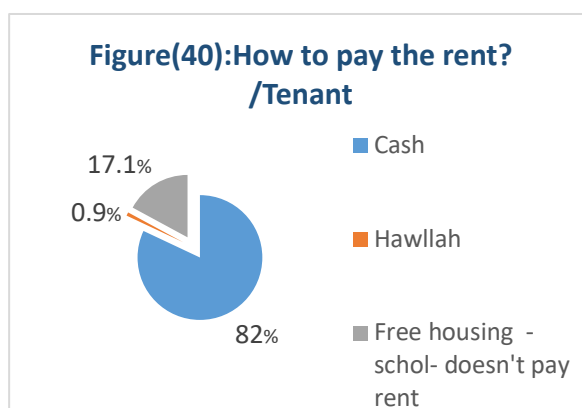
4.3 Services in the Governorate

Figure (38) shows that 16.7% of rental payments included essential services, while 83.3% of did not include any basic services. The results of the landlords’ analysis clearly show that 80.5% of landlords do not include any essential services such as water and electricity when renting housing to tenants, while 19.5% do include these services, Figure (39).



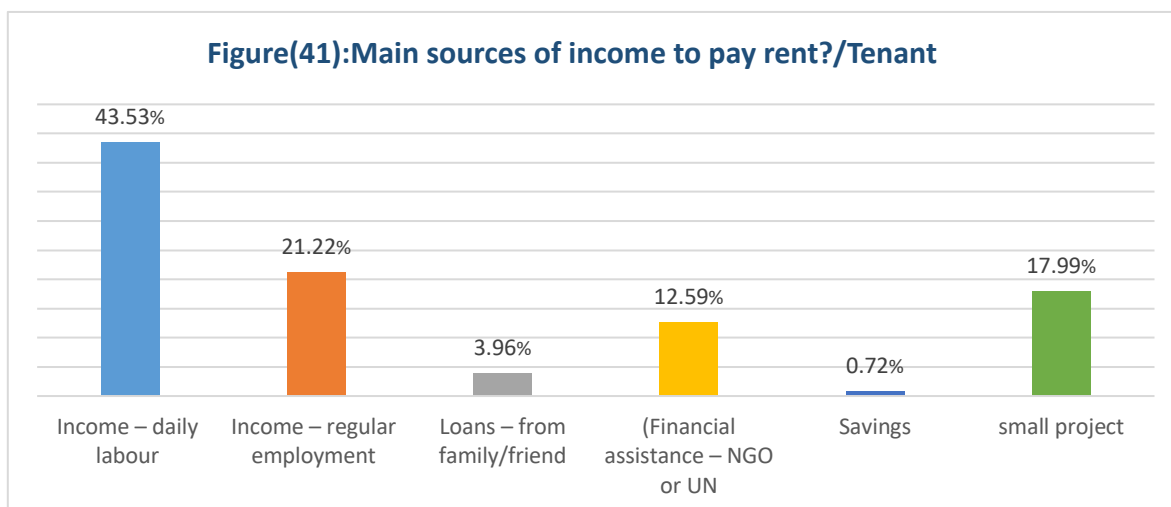
4.4 Rent Payment Methods

The results of the tenants’ sample analysis (Figure 40) reveal that 82% of the tenants pay rent in cash, 0.4% through money transfer, and 17.1% other (free housing, school facilities, does not pay rent etc.). The results of the landlords’ sample data confirmed that the main method of paying rent in the Governorate of Shabwah is cash payment.



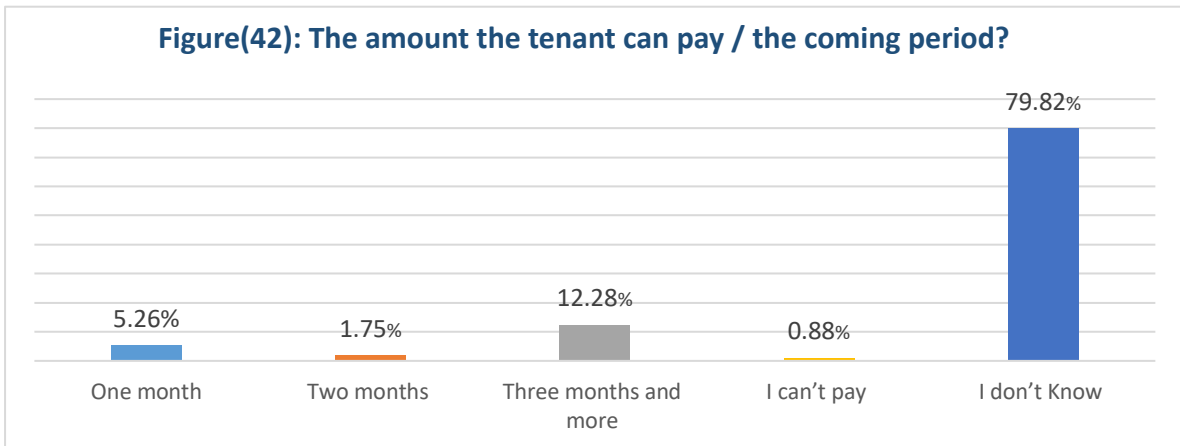
4.5 Source of Income to Pay the Rent

Figure (41) shows that the tenants’ sample pay rent from the follows sources: 43.53% their daily labor, 21.22% income from stable employment, 17.99% through their own small projects, 2.88% financial assistance via NGOs/UN, 3.96% loans from family and relatives, and 0.72% using their savings.

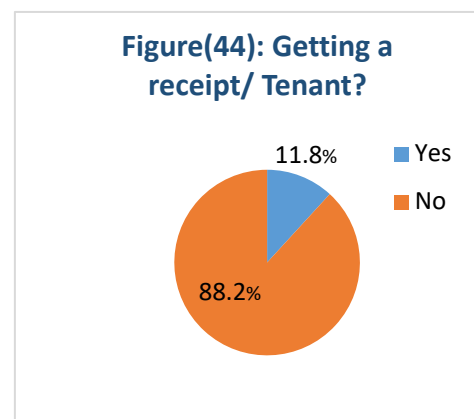
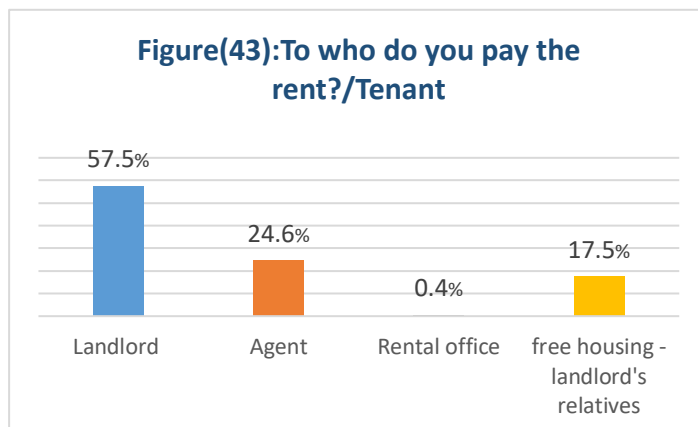


4.6 Paying the Rent

Figure (42) illustrates the amount of rent that the tenants are able to commit to paying in the next coming months. 79.82% of tenants did not know, 12.28% will be able to pay for more than three months, 5.26% for only one month, 1.75% two months, and 0.88% cannot pay.



Data from the tenants' sample analysis show that 57.5% of tenants hand the rent money directly to landlords, 24.6% give the rent payment to the landlords' agents, 17.5% do not pay rent (because they are relatives of landlords), and 0.4% hand it to real estate offices (Figure 43). The study also shows that 11.8% of tenants get a receipt for rental payment from landlords, whereas 88.2% do not get a receipt (Figure 44).



In the same context, study shows that 14.3% of landlords give a receipt for rental payment, whereas 85.7% of landlords do not give a receipt (Figure 45).

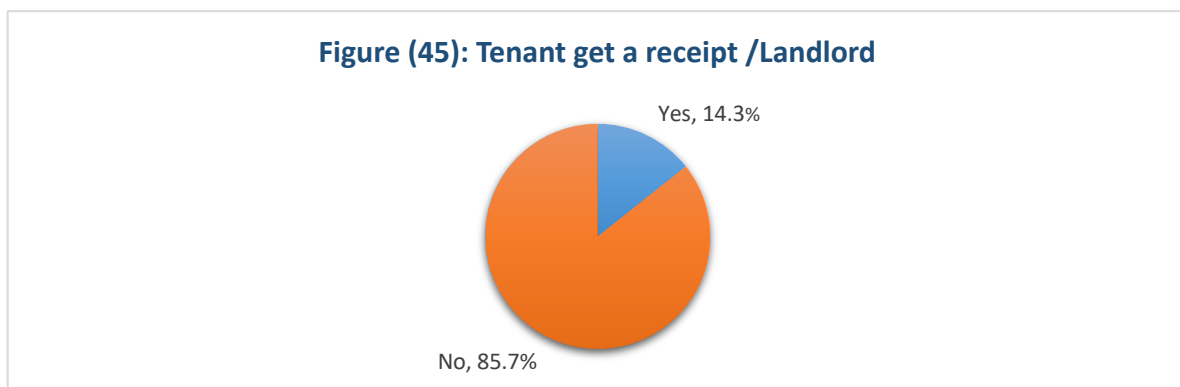
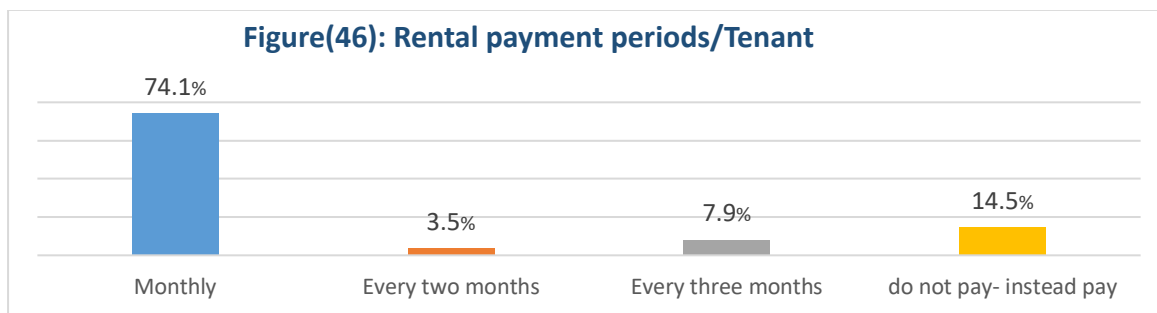
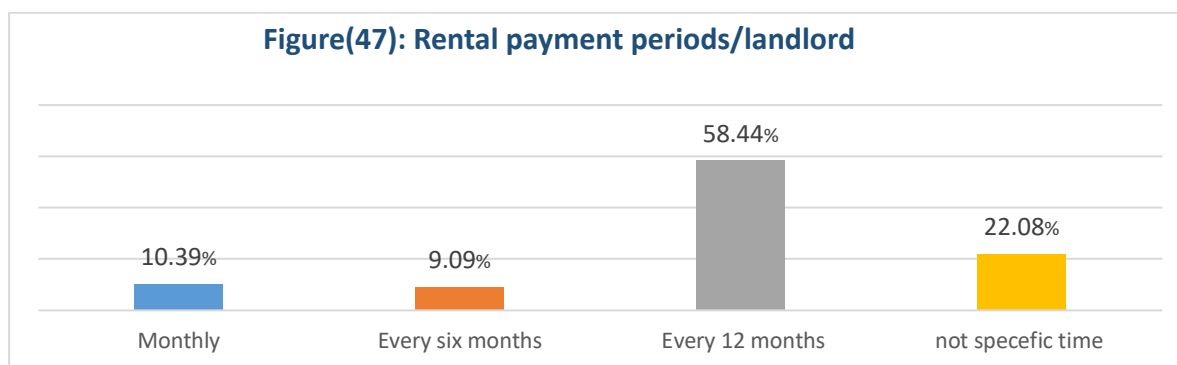


Figure (46) illustrates rental payment's due dates. According to the tenants' sample, 74.1% of tenants pay on a monthly basis, 7.9% every three months, 3.5% every two months, and 14.5% do not pay rent (figure 47).

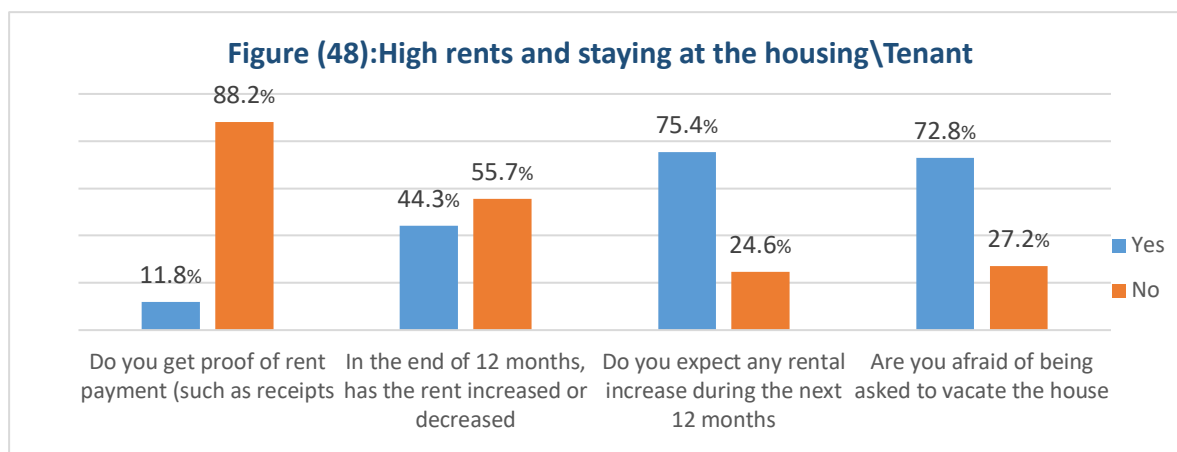


In the same context, the results of the landlords' sample analysis show that landlords reported that there is no defined period of time when tenants are obligated to pay rent. The study shows that are flexible according to tenants' ability to pay. These periods can be, every 12 months by 58.44% of the landlords, 10.39% monthly, 0.09% every six months, and 22.08% of landlords did not specify a deadline (Figure 47).



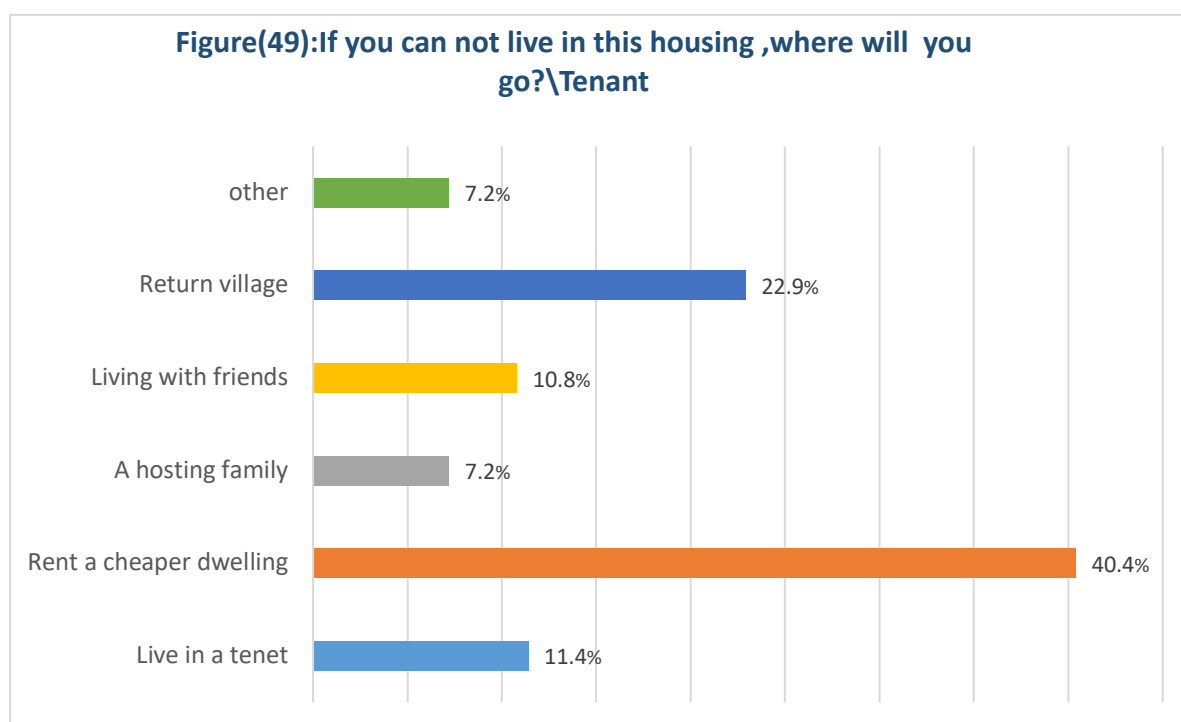
4.7 Rent Increase and Stability

The results of the study revealed the correlation of high rent and housing' stability. 75.4% of tenants expected an increase in rent payment over the next twelve months, and 24.6% did not anticipate any raise in the rent payment. As for the previous year, 55.7% of tenants stated that there was no increase in rent in the past twelve months, whereas 44.3% reported an increase in rent payment in the past year. 72.8% of tenants expressed their worries from the possibility of being evicted from the rented housing, while 27.2% did not have those fears. The study also showed that of all rent payments, 11.8% of tenants got a receipt, whereas 88.2% did not get a receipt for rental payment (Figure 48).



The results of the FGDs and KII reveal that most tenants anticipate an increase up to 20% - 50% in rental payment due to the continuous influx of IDPs especially from the Governorate of Al-Hudaydah, and also because of the high demand and low supply of rented housing in the housing market. In addition to that, there is a lack of construction of new housing due to the high prices of building materials (associated to the dollar exchange rate).

Figure (49) illustrates the results of the tenants’ sample analysis in regards to alternatives tenants are considering in case of unavailability of rented housing. 40.4% will try to find cheaper and more affordable housing, 22.9% return to their hometowns/villages, 11.4% live in tents, 7.2% stay with hosting families, 10.8% stay with friends, and 7.2% was categorized as other (search for another housing).



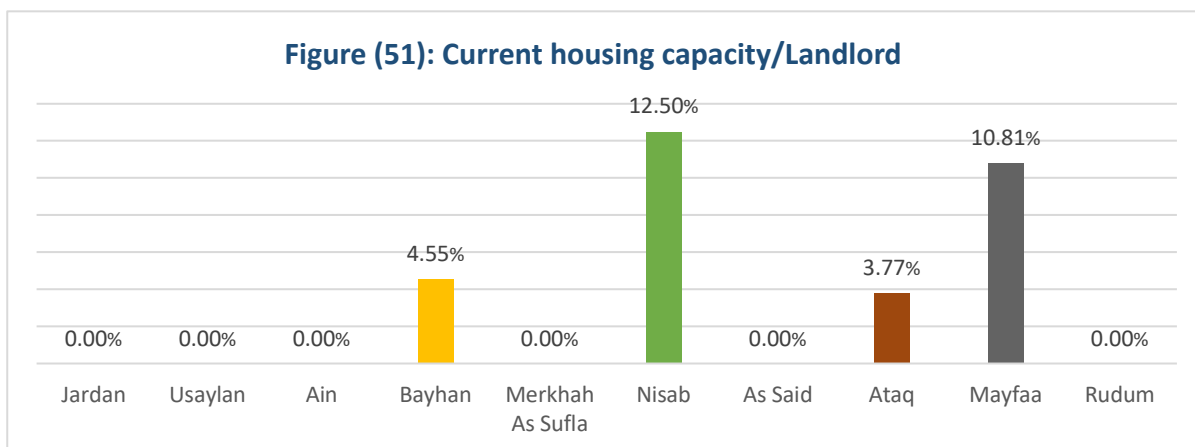
4.1 The Total Income of Tenants and their Families.

The results of the tenants’ sample analysis show that the collective income of working members in the housing is 46,855 YER on average. As previously mentioned, the average housing rent is (20,863 YER) in addition to basic services (9,530 YER). These results show that more than half of the income goes to rent and basic services and the rest is very low to sustain a good living, reflecting the extent of the humanitarian and economic crisis that tenants are enduring, especially that 43% of them are IDPs (as shown in Figure 5).

Section 2: Host Community Capacity Assessment

1. Rental Housing Capacity

The analysis reveals that the housing capacity in the Governorate of Shabwah is quite limited. The results of the landlords' analysis show that landlords covered in this study rented 185 housing to tenants in Shabwah. 95.68% of these housing were occupied, while only 4.32% were vacant. Figure (51) shows that the current rental housing capacity is limited in the districts of Nisab 12.50%, Mayfaa 10.81%, Bayhan 4.55%, and Ataq 3.77, while other districts have no capacity at all. These results seem, to a large extent, consistent with the data from the interviews administrated by the key informants who highlighted the difficulty in finding rental housing in their districts.



The analysis of the tenants' sample data shows that a housing's rent in the Governorate of Shabwah is 20,888 YER per month on average, which is a reasonable amount when compared to the quality and size of the rented housing and the 300% increase of prices. The study also shows that a tenant pays an additional 8,127 YER on average for basic services, which is relatively high, this number is subject to market prices fluctuation, especially water and fuel.

2. Community Hosting IDPs

Shabwah Governorate has witnessed an exodus from several Governorates since the outbreak of the war, especially from the northern areas (Abyan, Al Hudaydah, Sana'a, Ibb, Marib, Bayhan, Aden, Al-Baydah, and Taiz, as well as some of the districts of Shabwah where conflicts are ongoing. IDPs that moved from Al Hudaydah, Al-Bayda and Marib Governorates chose Sabawah due to its geographical proximity. The study also shows that IDPs moved to this Governorate because it was distant from areas of conflict, safety, and being welcomed by the local community.

The community of Shabwah Governorate is a tribal society that accepts the presence of IDPs in all circumstances and treats them with respect and has good relations with them. The community provides IDPs with support despite the following challenges: difficult circumstances due to the war, burdens caused by the influx presence of IDPs, pressure on services such as increase in commodities' prices.

The participants in the FGDs and KII highlighted other issues resulting from the presence of IDPs in the hosting community. They complained that class rooms have become more crowded than before, diseases have spread out, and streets and markets are overcrowded.

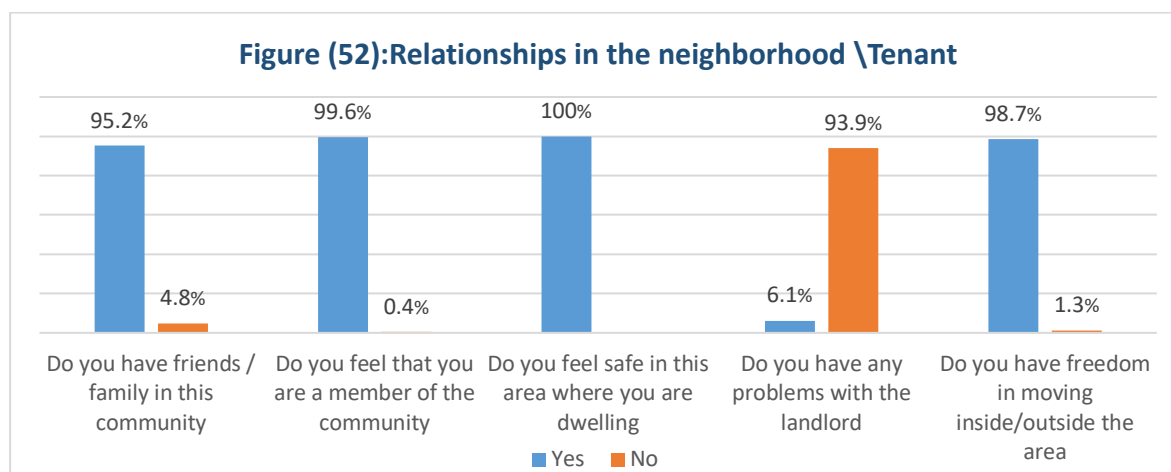
The study shows that the majority of IDPs fear of being unable to pay rent and being evicted due to the prolonged duration of the war. This issue has been discussed by many participants in the focus groups. One participant said: "It is difficult to find a housing even if you have money". One female said: "I spent a month searching for a housing and I did not find one, finally I decided to rent a hotel room."

The challenges and fears faced by IDPs' women and children are mainly of exploitation. Female members of IDPs' families who pursuit a job are not hired due to the fact that the local community does not accept the concept of a working woman. As for IDPs' children, they work outside their housing and women worry that their children might become victims of child exploitation as well as being exploited themselves.

3 Tenants / IDPs Relations with Neighbors

3.1 The Existence of Relationships in the Neighborhood

The tenant's sample analysis study (Figure 52) shows that 95.2% of tenants have friends and relatives inhabiting the area where they lived, while 4.8% do not have friends or relatives in the same neighborhood. The study also showed that 99.6% of tenants stated that they feel part of the community, whereas 0.4% reported that they did not feel that way.



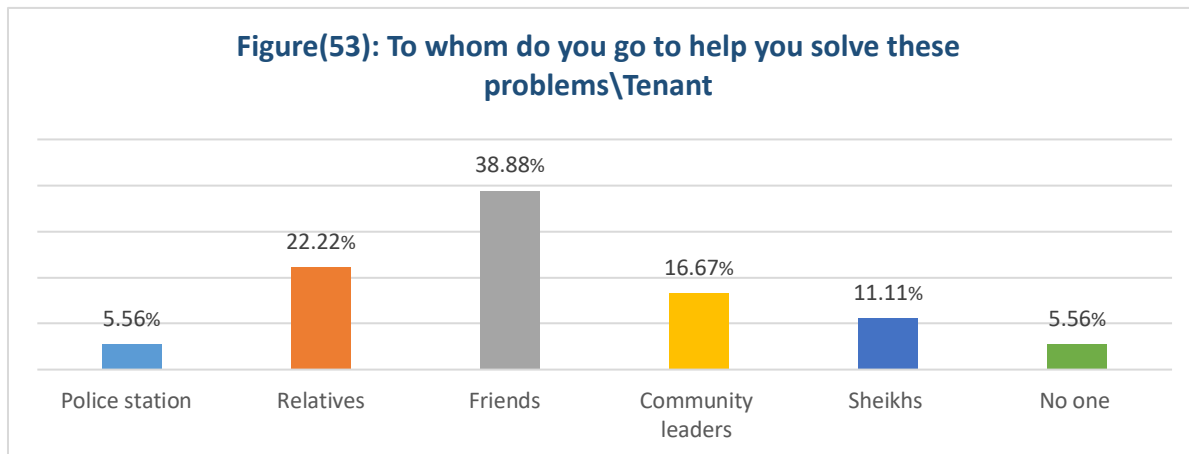
The results of the study analysis confirmed that generally, IDPs have good relationships with the local community and that they are welcomed and supported by them.

3.2 Feeling Safe and Freedom of Movement in the Neighborhood

In regards to freedom of movement inside and outside the area, 98.7% of tenants said that they had no problems, whereas 1.3% stated that they did not have freedom of movement. The study also showed that 100% of tenants felt safe in the areas where they lived (Figure 52).

3.3 Tenants / IDPs Relationship with Landlords

In regards to the tenants/IDPs relationship with the landlords (Figure 52), 93.9% of tenants did not have any problems with their landlords, while 6.1% reported that they do have issues with their landlords. Figure (53) shows who do tenants go to in order to settle problems with landlords: 38.88% of tenants go to their friends, 22.22% to relatives, 16.67% to community leaders, 11.11% to Sheikhs, 5.56% of tenants have no one to solve their problems (solve their problems themselves).



3 Community Based Organizations.

CBOs working in Shabwah 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. 31 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 Shabwah Governorate shows the availability of (28) 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 Shabwah. The study's consultant was able to gather full data on NFI/shelter suppliers (full data 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 targeted districts of Shabwah Governorate is attached in - Annex (5)

7 Conclusions

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

- Since the outbreak of the war, Shabwah Governorate has witnessed an exodus from several Governorates, especially the north areas (Abyan, Hudaydah, Sana'a, Ibb, Marib, Bayhan, Aden, Al-Baydah, Taiz and Al-Hudaydah. Shabwah Governorate has become one of the main targeted areas that IDPs are moving to due to its geographical proximity to many affected Governorates such as Al-Bayda and Marib as well as some of the districts of Shabwah where conflicts are still ongoing. The study also shows that IDPs chose this Governorate because it was distant from conflict areas, safety and being welcomed by the local community.
- The analysis of the study indicates that the tenants' age category in the target districts. The age categories of tenants are: 39.25% over 18 years to 55 years, and 35.42% over 5 years to 18 years, 22.19% less than 5 years old, and 3.14% of family members over 55 years. And according to the results of the analysis, the gender of the tenants is 53.02% males and 46.98% 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).
- The results of the tenants' analysis indicate that 87.3% of the tenants have verbal rental agreements, 3.9% written agreements but not legalized by the local police, 4.4% no agreements (rent free housing), and 4.4% are official and legal written agreements. These results confirm the landlords' data analysis that states that most rental agreements in the Governorate are informal/verbal agreements (Figure 36). This clearly shows that the rental market in the Governorate is not governed by formal contracts/legal agreements
- The analysis of the data of the tenants' sample shows that the housing rent in the Governorate of Shabwah is 20,888 YER per month on average. Also, 75.4% of tenants expected an increase in rent payment in the next twelve months
- The study also shows that a tenant pays an additional 8,127 YER on average for basic services, which is relatively high and considered as an extra burden on tenants. This number is subject to market prices fluctuation, especially water and fuel.

- The tenants' sample analysis study shows that a 100% of tenant felt safe in the areas where they lived, 95.2% of tenants have friends and relatives inhabiting the same area, and 99.6% of tenants feel part of the community.
- The study also revealed that the challenges faced by the local community in hosting IDPs are: overcrowding streets and markets, the increase of prices, and IDPs having priority and precedence over the local community in receiving aids and assistance, despite the poor financial conditions of some of the local residents.
- Results from the data analysis indicate that 62.9% of the housing managed by the landlords are in acceptable conditions and only need minor repairs, and 22.6% are in good conditions and do not require any maintenance, and 14.5% are in bad conditions and need maintenance and repairs.
- The study reveals that the local community of Shabwah is willing to receive more IDPs. However, there were a number of difficulties that face the local community such as the lack of housing available for rent, and the housing that are currently available for rent might not be available in the near future due to the continuous influx of IDPs. Another problem is limited investment in housing construction due to high prices of building materials and the instability of the dollar exchange rate. Finally, the study suggested that IDPs need to spread out in several areas of the Governorate instead of gathering in one place, which will decrease pressure on the centers of gathering and increase job opportunities.
- The results of the analysis indicate an approval of 66.2% of landlords to participate in any future programs to support rents for the IDPs. They expressed their willingness to reveal ownership documents and also agreed to receive rent money through the banking system.

The results of the analysis of the focus group discussions and the key informant interviews of both genders are as follows:

- The community of Shabwah Governorate is a tribal society that accepts the presence of IDPs despite circumstances of the war and treats them with respect and has good relations with them. The community supports IDPs despite the following challenges: difficult financial circumstances (due to the war), burdens caused by the influx presence of IDPs, pressure on services such as increase of prices and overcrowding streets and markets.
- The study shows that a majority of IDPs fear of being unable to pay rent and consequently being evicted due to the prolonged duration of the war.

The challenges and fears faced by IDPs' women and children are mainly of exploitation. Female members of IDPs' families who pursuit a job are not hired due to the fact that the local community does not accept the concept of a working woman. As for IDPs' children, they work outside their housing and women worry that their children might become victims of child exploitation as well as being exploited themselves (the type of exploitation was not specified).

- The role of the local authority is nonexistent.
- Investments in housing construction and real estate property is weak.
- The local community of Shabwah is willing to receive more IDPs.

Summary of Assessment:

District	CBOs	Suppliers				Financial point	Average Rent rate/YER
		Household item	Furniture	Cloths	Shelter materials		
Ain	1	1	3	3	2	1	26733
Al Talh	1	0	0	0	1	1	17545
As Said	1	1	0	0	3	3	30600
Ataq	5	7	8	6	6	5	17174
Bayhan	2	4	6	7	5	3	15881
Hatib	1	0	0	0	0	0	20792
Jardan	2	0	0	0	2	2	12625
Mayfaa	7	6	5	5	5	4	12348
Merkhah Al Ulya	0	0	0	0	2	0	13351
Merkhah As Sufla	1	3	2	3	3	1	18280
Nisab	2	5	3	3	1	2	28462
Rudum	6	1	1	8	5	3	21019
Usaylan	2	3	2	6	5	3	12826

Annexes:

Annex (1): Assessment Maps

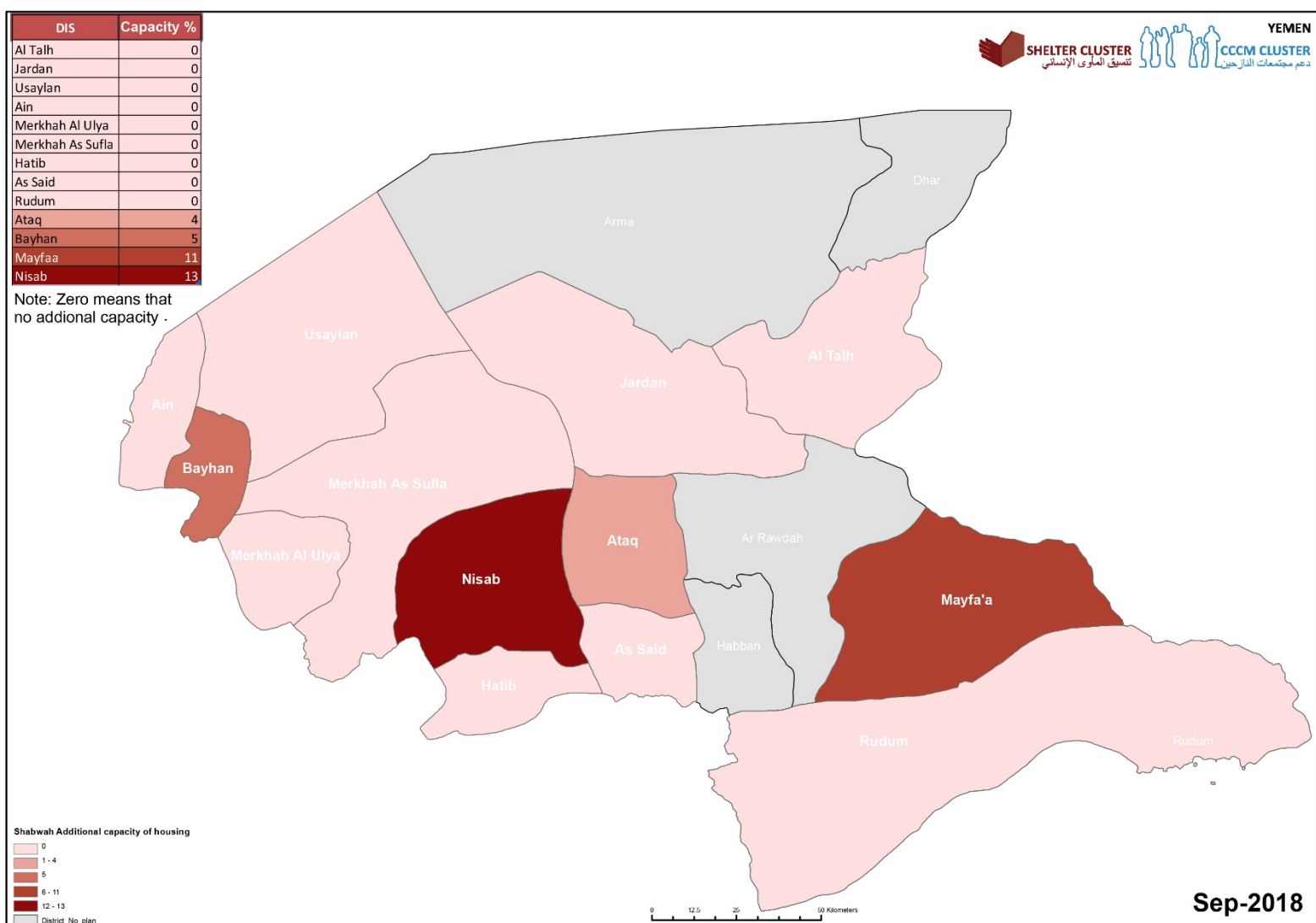
Annex (2): Community Based Organizations

Annex (3): Financial Points(Exchangers and remittance agents).

Annex (4): Voucher based suppliers.

Annex (5): Local Authorities

Annex (6): Housing capacity Map



Index

Section 1: CBOs

Activities provided by CBOs:

Relief, 368-369, 372, 385, 389
Development, 371, 374-384, 386, 388, 391-392, 396, 398
Education, 370
Development- Relief, 373, 387, 390, 393-395
Education-development, 397

Validity of license

Not valid, 371, 375-376, 382, 390-391, 396
Valid, 368-370, 372-374, 378, 381, 383-388, 394, 398

Bank Accounts

Available, 368-373, 376, 378-388, 390, 393-395, 398
Not Available: 374-375, 377, 389, 391-392, 396-397

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, 1925-1928,1932,1935,1948,1949,1951,1952,1957,1958,1961-1963,1966,
1972-1975,1978,1979,1986,1989,1992,1995,1996,1998,2005,5007,2008,2010,2011,2013
2015,2018,2019,2026,2031,2033,2036
Furniture, 1929,1933,1934,1936-1939,1941,1946,1950,1955-1957,1959,1964,1966,1969,
1973,1974,1985,1987,1999-2001,2011,2016,2017,2022,2023,2027
Shelter material, 1917-1919,1921-1924,1930,1931,1940,1942-1945,1947,1954,
1960,1965,1968,1970,1977,1980-1984,1988,1991,1994,2003,2004,2006,2009,2012,2020,
2028-2030,2032,2034,2037
Household items , 1920,1932-
1934,1936,1938,1939,1941,1946,1953,1955,1959,1966,1967,1971,
1976,1987,1989,1990-2002,2011,2014,2018,2021,2024,2025,2035

Previous experience in voucher program:

Available:

1921,1923,1931,1937,1940,1965,1974,1977,1995,2004,2028,2029,2031,2033

Not Available: 1917-1920,1922,1924-1930,1932-1936,1938,1939,1941-1964,1966-
1973,

1975,1976,1978-1994,196-2003,2005-2027,2030,2032,2034-2037

Willingness to respond in emergency:

Willing: 1917-1934,1937,1939-1956,1963-1984,1986,1996,1998-2029,2031-2037

Not willing: 1935,1936,1938,1957-1962,1985,1997,2030