

VALLIS COMMODITIES LIMITED (VCL)

COUNTRY REPORT – RWANDA

EXECUTIVE SUMMARY

1. The Republic of Rwanda is a small landlocked country in central east Africa. It is the most densely populated country in Africa and 65% of the population are under the age of 25. The western side of the country is dominated by mountains, while the eastern side consists of savanna, plains and swamps.
2. The history of Rwanda is dominated by simmering tension between 2 ethnic groups, the Tutsi and the Hutu, which often erupted into violence. After a colonial period where the country was controlled by first Germany and the Belgium, Rwanda gained independence in 1962. Ethnic violence remained commonplace, culminating in a genocide in which 800,000 to 1,000,000 Rwandans were killed in 1994. Since 1994 the country has made significant progress but this is considered by many to have come at the cost of political freedom.
3. The political system in Rwanda was constituted in 2003 as a multi-party presidency. President Paul Kagame of the RPF (Rwandan Patriotic Front) is the current Chief of State and Head of the Executive. Few political parties are represented in the Rwandan parliament due to the intervention of the President to ensure that opposition to the RPF is minimal.
4. Rwanda is one of the poorest nations in the world with a GDP of \$20.32 billion. The economy crashed during the events of the early 1990's but has since started to recover and currently the GDP grows on average by 8% per year. Rwanda's economy is dominated by agriculture (with coffee as the main crop) and mining. Strong growth is predicted to continue for Rwanda but the country still relies on budget support from other countries.
5. Rwanda has transport links to the port of Mombasa as well as a major regional airport in Kigali. Other infrastructure is in need of improvement, and cost of access to utilities remains high.
6. The education department emerged from the chaos of the early 90's through strong government policies and support from other countries to have one of the best enrolment rates in Africa. The health department has not been so successful, with the country lacking specialist staff and equipment.

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1. INTRODUCTION AND DEMOGRAPHICS

- 1.1 Rwanda is officially named the Republic of Rwanda. It is a landlocked country in central east Africa. Rwanda is bordered by Uganda to the north, Tanzania to the east, Burundi to the south and the Democratic Republic of the Congo to the west. Rwanda is divided into 5 provinces based on geography: Northern, Southern, Eastern, Western Provinces and the municipality of Kigali.



Figure 1 - Map of Rwanda (source: <http://www.lib.utexas.edu/maps/rwanda.html>)

- 1.2 At 26,338 square kilometres (10,169 square miles), Rwanda is similar in size to Djibouti. It is the most densely populated country in Africa.
- 1.3 The population of Rwanda was estimated at 11.2 million in October 2015, with 1.15 million of those living in the capital, and largest city, Kigali. The other main centres of population are Gisenyi and Butare. The population growth rate is 2.6%.
- 1.4 The population pyramid below shows the age structure of the country's population, where more than 65% are under the age of 25. According to figures from 2015, average life expectancy in Rwanda for the total population is almost 60 years.

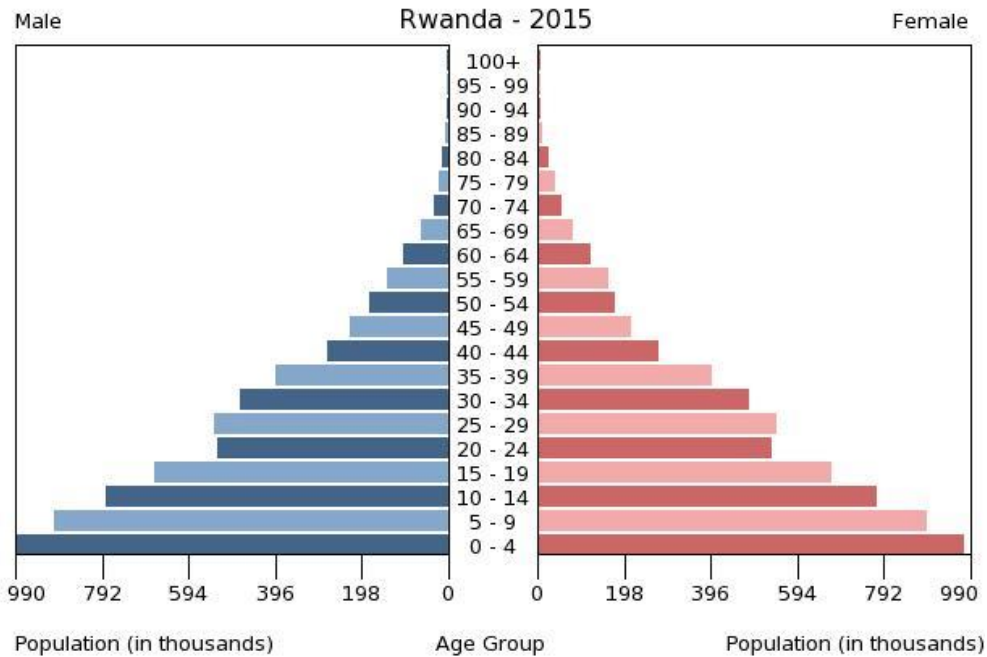


Figure 2 - Rwanda population ages (source: CIA World Factbook)

- 1.5 Rwanda’s population is made up of 3 distinct ethnic groups: the Twa, Tutsi and Hutu. The Hutu comprise 84%, the Tutsi 15% and the Twa 1% of the population. In precolonial times the Tutsi were the ruling class, from whom the kings and the majority of chiefs were drawn, while the Hutu were subsistence farmers.
- 1.6 The population is largely Christian, roughly evenly split between Roman Catholicism and Protestantism. Muslims make up 2% of the population.
- 1.7 The currency of Rwanda is the Rwandan Franc (RWF). At the time of this report the exchange rate was as follows: US1\$ = 773.05 RWF and GBP1 = 1,091.94.
- 1.8 Rwanda’s international telephone country code is 250, its internet code is .rw.
- 1.9 Kinyarwanda is the official language and the language of government. Other recognised languages spoken in the country include French, English and Swahili.
- 1.10 Mountains dominate central and western Rwanda, while the eastern border consists of savanna, plains and swamps. Rwanda’s temperatures are lower than other equatorial countries because of its high elevation. There are 2 rainy seasons from February to June, and September to December. These are separated by 2 dry seasons: the major one from June to September, during which there is often no rain at all, and a shorter and less severe dry season from December to February.
- 1.11 The Rwandan flag is depicted below. The green is symbolic of the country’s prosperity, the yellow of economic development, and the blue represents happiness and peace. The sun represents enlightenment.



Figure 3 - Rwandan flag (source: CIA World Factbook)

2. HISTORY

- 2.1 The history of Rwanda is dominated by simmering tension between 2 ethnic groups that often erupted into violence. The most devastating and shocking violence took place during 4 months of 1994 when 10% of the population were murdered with machetes and clubs. This shameful and brutal waste of life has had huge influence on Rwanda today both internally and with other nations that could have intervened to stop the killing.
- 2.2 The area that is now Rwanda was populated by the Hutu, a people thought to have originated in the area of Chad. The Hutus displaced the hunter gatherer Twa people between the 5th and 11th century. The Hutu relied on subsistence agriculture and organised themselves under multiple petty kings, known as Bahinza, who ruled over limited domains.
- 2.3 The Hutus were joined in the region by the Tutsis in the 15th century. The Tutsis are thought to have originated from Ethiopia. They gradually subjugated the Hutu, forcing them to become their vassals. The Tutsi were herdsman and the Hutu lived by farming crops.
- 2.4 In the 19th century the leader of the Kingdom of Rwanda was Kigeri IV Rwabugiri. He conducted a decade long military conquest which expanded the borders of the kingdom. By the end of Rwabugiri's rule, Rwanda was divided into a standardised structure of provinces, districts and neighbourhoods. He had also administered a hierarchy of chiefs who were predominantly Tutsis.
- 2.5 From 1894 to 1918, Rwanda was part of German East Africa. At the same time Germany also claimed Burundi, a separate kingdom to the south of Rwanda. The entire area was treated as one colony and was known as Rwanda-Urundi.
- 2.6 In 1916, Belgium gained control of Rwanda-Urundi as reparation for Germany invading Belgium at the start of World War 1. In 1924, the League of Nations granted Belgium a mandate to administer the colony. The Belgian administration of the country perpetuated the dominance of the privileged Tutsi class over the subjugated Hutu labourers.
- 2.7 In 1933, Belgium issued the Rwanda-Urundi population with identity cards that stated the ethnicity of individuals. This exacerbated the difference between the ethnic groups and reinforced the privileged status in all walks of life of the Tutsi over the Hutus. This discrimination caused huge tension between the groups. The Hutus made up 85% of the population, the Tutsis 14% and the Twa made up the remaining 1%.
- 2.8 The Tutsis remained the dominant group within Rwanda-Urundi until 1959 when Tutsi political activists in Gitirama assaulted a Hutu political rival, Dominique Mbonyumutwa. The incident initiated a social revolution that resulted in Rwanda being declared a republic. Consequently, the ruling Tutsi monarch, Kigeri V, along with tens of thousands of Tutsis was forced into exile in Uganda.
- 2.9 Rwanda-Urundi became independent in July 1962 and split into 2 countries: Rwanda and Burundi. Rwanda remained as a republic, but Burundi reverted to a constitutional monarchy. The first Rwandan presidential election was won by Grégoire Kayibanda, leader of the Party for Hutu Emancipation that was followed by large scale violence resulting in a massacre of 14,000 Tutsis.
- 2.10 Juvénal Habyarimana was elected president in 1973 and remained in power for 21 years. During his period in office, many Tutsis sought refuge in other countries, notably Uganda. In 1982, Uganda attempted to return 40,000 refugees to Rwanda which only accepted 10% of them. This left 35,000 Tutsis without legal national status on the Ugandan border, many of whom were easily recruited to the newly formed Rwandan Patriotic Front (RPF) with the aim to counter Habyarimana's regime.
- 2.11 The Rwandan civil war started in October 1990 when Tutsi officers serving in the Ugandan army crossed the border with the intention of seizing power from Habyarimana. The war lasted 3 years.
- 2.12 One of Rwanda's most fervently Hutu newspapers published the Ten Commandments in December 1990. These were filled with hatred for the Tutsis and demanded that Hutus must not associate with nor show any mercy to Tutsis.

- 2.13 The flames of civil war were fanned further by the inception in 1991 of a supremacist ideology called Hutu Power, which used the Hutu Ten Commandments as the basis of its doctrine. The effectiveness of Hutu Power was enhanced by the Habyarimana government's recruitment of Hutu youth militants known as the Interahamwe.
- 2.14 President Habyarimana begin to lose popularity with local extremists in 1992 as he failed to suppress the guerrillas of the RPF, and under international pressure, he began to negotiate with them. This, along with many rumours of Tutsi uprisings led to a further increase in attacks on the Tutsis.
- 2.15 The Rwandan Civil War was ended on 4th August 1993 when the Arusha Accords were signed in Tanzania by the government of Rwanda and the RPF. The 5 Accords established a Broad-Based Transitional Government which included the RPF and 5 political parties that comprised the temporary government after April 1992 and a recipe, it was thought, for lasting peace including the rule of law and the repatriation of refugees.
- 2.16 On 6th April 1994, a plane carrying President Habyarimana and the President of Burundi was shot down as it came in to land at Kigali. All occupants of the plane were killed. Responsibility for the murders is disputed, nevertheless, the consequences cannot be.
- 2.17 Over 100 days from April to July 1994, some 800,000 to 1,000,000 Rwandans were slaughtered. This catastrophic genocide was aimed at Tutsis and any Hutus opposed the killing campaign. The weapon of choice was the everyday tool used in agriculture, the machete. Even with the knowledge of a genocide taking place many countries were unwilling to intervene.
- 2.18 The United Nations Assistance Mission for Rwanda (UNAMIR) was first created to help with the signing of the Arusha Accords. They were additionally used to help aid with the peace process after the signing. On the 7th April 1994 at the beginning of the genocide, Prime Minister Agathe Uwilingiyimana and 10 Belgian peacekeepers were murdered. After this Belgium withdrew their force from UNAMIR which consequently saw many others withdraw from Rwanda. This left under 300 soldiers in Rwanda to assist in the prevention of the genocide.
- 2.19 The RPF reacted quickly in an attempt to prevent any more killings. A provisional government was formed and by the end of August almost the entire country was under control. As part of the RPF attempts to reduce racial tension between Hutus and Tutsis, identity cards highlighting ethnic background were abolished. However, many Hutus fled the country to avoid possible Tutsi retribution. This meant refugee camps were overcrowded and many people died of disease.
- 2.20 The following years were traumatic for the Rwandan population. Many criminals awaited trial and innocent people awaited housing. It was hard to identify the perpetrators of the crimes committed during the genocide: there were many thousands responsible from all factions.
- 2.21 Rwanda today has shown progress and modernisation. However, even with the economic progress, it is said to have come at the cost of political freedom. The RPF are still the leaders of Rwanda and any opposition to this party have struggled to gain recognition.

3. CULTURE

- 3.1 Music and dance are an integral part of Rwandan ceremonies, festivals, social gatherings and storytelling. Drums are a key part to Rwandan music. The most famous dance is the Intore which is composed of 3 parts: the ballet performed by women, the dance of heroes performed by men and the drums.
- 3.2 Rwandan cuisine is based on the local staple foods: bananas, plantain, sweet potatoes, beans and cassava. Many Rwandans eat meat only a few times a month. Those who live near water eat fish, mainly tilapia. Brochette is a popular dish normally containing goat meat barbequed on a skewer and served with grilled bananas.
- 3.3 Fermented Milk is a common drink throughout the country. Other popular drinks include a beer called urwagwa and made with bananas.

- 3.4 Arts and crafts within Rwanda include: pottery, wood carvings, woven baskets and imigongo. Imigongo is a unique cow dung art which is predominantly made by women. The art is often in black, white and red and is painted into patterned ridges, forming geometric shapes.



Figure 4 - Example of imigongo

4. POLITICS

- 4.1 The current political system in Rwanda was constituted in 2003 as a multi-party presidency.
- 4.2 President Paul Kagame is the Chief of State and Head of the Executive. A referendum in 2015 voted to amend the constitution to allow Kagame to stand for election in 2019, even though he had already served his maximum of 3 terms.
- 4.3 Anastase Murekezi is Prime Minister and is from the Social Democratic Party. He assumed office on 24th July 2014 after he was nominated by President Paul Kagame.
- 4.4 The Cabinet comprises a Prime Minister and 32 Ministers, 10 of whom are Ministers of State. All are appointees of the President. There is a Minister of Youth and ICT, a Minister of Disaster Management and Refugee Affairs and a Minister of Gender and Family Promotion in the Prime Minister's office. These appointments, coupled with the fact that over 40% of the cabinet is female, demonstrate the efforts to modernise Rwanda.

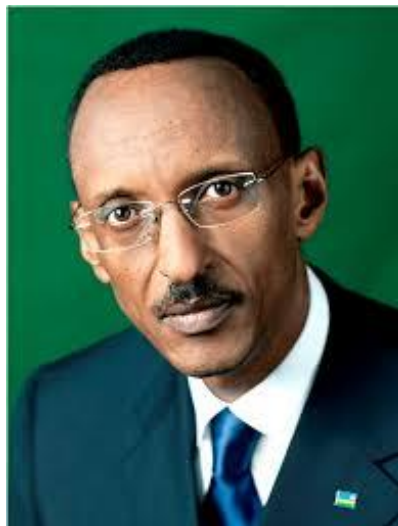


Figure 5 - President Paul Kagame (source: www.umva.rw)

- 4.5 The other branches of government are the Legislature and Judiciary:
- 4.5.1 The Legislature consists of the Senate (26 seats) and Chamber of Deputies (80 seats). The Senate is made up of 12 members elected by local councils, 8 appointed by the

President, 4 appointed by the Political Organisations Forum and 2 selected by institutions of higher learning. Members serve 8-year terms. The Chamber of Deputies has 53 members directly elected by proportional representation, 24 seats exclusively for women and 3 selected by youth and disability organisations.

- 4.5.2 The highest power in Rwandan judicial system is the Supreme Court. It consists of a court president, vice president and 12 judges. Judges are nominated by the President, after consultation with the Cabinet, serving 8-year non-renewable terms.
- 4.6 There are few political parties represented in the Rwandan parliament due to the intervention of the President to ensure that opposition to the RPF is minimal and any extremist campaigning is quickly banned with offenders liable to imprisonment. Even though approximately 12 political parties are formed in the country, in 2010 elections there were only 5 non-RPF candidates of whom 3 were registered as the other 2 did not have their candidacy formally endorsed in time.
- 4.7 Rwanda has made remarkable progress since the 1994 genocide. However, poverty rates are still as high as 60%, with 40% living in extreme poverty. Rwanda has appointed Ministers with specific portfolios designed to tackle this. Geraldine Mukeshimana is the Minister for Agriculture and Animal Resources with the remit to transform agriculture. This is significant as 90% of the population work in the agriculture, mainly at the subsistence level.
- 4.8 Rwanda ranked 55 out of 175 in the Corruptions Index 2014 published by Transparency International. In addition, Rwanda ranked 7 out of 47 within sub-Saharan Africa, meaning Rwanda is one of the least corrupt countries on the continent. This is an overall improvement since the 2010 records which show Rwanda ranked 66 out of 178.

5. MAIN INDUSTRY AND ECONOMY

- 5.1 Rwanda is amongst the poorest nations in the world with a GDP of \$20.32 billion.
- 5.2 The 1994 genocide decimated the economic base and severely impoverished the population. However, the country's economy is recovering and between 2003 and 2014 GDP growth averaged 8% a year.
- 5.3 Today the country has a GDP of \$1,800 per person compared to \$900 in neighbouring Burundi (2015 estimate).
- 5.4 Agriculture accounts for more than one third of the country's GDP and 90% of the labour force. Coffee is a major agricultural export as it is a crop well suited to the country's high altitude, volcanic soil, sun and equatorial mist.
- 5.5 **Coffee Industry.**
- 5.5.1 Prior to 1994, the coffee industry had been profitable and important for Rwanda's revenue, supplying 60-80% of its export earnings. Following the civil war and the genocide the coffee industry and the infrastructure surrounding it had collapsed. However, today the industry has made a remarkable turnaround.
- 5.5.2 Changes in Rwanda's coffee sector were implemented in several waves. The first began shortly after the genocide, when the government removed a variety of barriers to trade, created incentives for groups and individuals to transfer their efforts from semi-washed to fully-washed coffee as an end product, and facilitated entrepreneurship in the coffee industry. More substantial reform efforts began in 2000, when the government, working with consultants and donors, studied the potential for adding value to Rwandan coffee through the production of higher-quality, washed, and fermented specialty coffee.
- 5.5.3 Today Rwanda is producing some of the best quality coffee in the world. The transformation has been hugely beneficial for 40,000 of Rwanda's 500,000 coffee farmers, who have switched to producing this speciality coffee.
- 5.5.4 Demand is high, particularly from coffee chains Starbucks and Green Mountain who will pay upwards of \$3.50 for a pound of the best coffee beans. The emergence of Rwanda

speciality coffee on the global market has been stunning success and there is real quality in the coffee coming out of Rwanda.

GROWTH IN THE SPECIALTY COFFEE SECTOR								
No of washing stations	2002	2003	2004	2005	2006	2007	2008	2009
Tons of green coffee exported	30	300	800	1200	3000	2300	2455	3045
No of specialty coffee buyers	2	8	16	25	30	30	-	-
Total value of specialty coffee exported (x \$1,000)	90	720	1,850	3,168	8,000	7,800	8,060	11,600

Figure 6 - Coffee sector growth since 2002 (source: <http://www.usaid.gov>)

5.5.5 The growth of the coffee industry has created jobs and increased capital for the small-holder farmers. It has also played a part in reconciling Hutus and Tutsis, who now work together growing coffee side-by-side, united in the same cause.

5.5.6 This has all played a vital role in boosting Rwanda's GDP, hard currency from exports and poverty reduction. The poverty rate was 59% of the population in 2001 and fell to 45% in 2011.

5.6 67.4% of the country's GDP is from the industry and service sectors, however these sectors account for only 10% of the country's workforce.

5.7 Mining Industry.

5.7.1 The mining industry has seen substantial growth in recent year and it is the second largest contributor to the Rwandan economy, being worth \$210.6 million annually.

5.7.2 The main mined exports are ores for tin, tantalum, tungsten and gold as well as gemstones.

5.7.3 The government believes the mining sector will continue to see growth along with the number of people working in this sector.

5.8 Rwanda has been rated by Transparency International as the 44th least corrupt country in the world out of 168 nations in 2015.

5.9 Ease of doing business index finds Rwanda the third easiest country to do business in Africa after Mauritius and South Africa.

6. INFRASTRUCTURE

6.1 Rwanda has a total of 4,700km of roads, approximately 1,200km of which are surfaced. The primary roads are in good condition, however, the feeder roads may be in poor condition. The World Bank is helping finance the road rehabilitation and construction.

6.2 There are currently no railways in Rwanda and no accessible port due to it being almost completely landlocked. Most imports come through the port of Mombasa in Kenya.

6.3 There are a total of 7 airports in Rwanda, of which on 4 have surfaced runways. The main airport is Kigali International Airport, which has connections with a number of cities across Africa and Europe. Plans are being made to build a new airport in the Bugesera district, approximately 40km outside Kigali. This airport will be much bigger and could act as a hub for the entire region.

6.4 Electricity costs 3 to 4 times more than that of the neighbouring countries. This is one of the main constraints on manufacturing industry. In an attempt to address the issue, Rwanda is considering

alternative sources of energy, such as harnessing the reserves of methane gas found in Lake Kivu.

- 6.5 Rwandatel is the government owned Telephone Company which is the sole wire-based telephone company and is also the exclusive Internet service provider.

7. MILITARY, SAFETY AND SECURITY

- 7.1 Defence spending retains an important share of the national budget. The country spends 1.2% of its GDP on military spending. Rwanda has had a number of security problems along its borders. There are still lingering problems with the DRC and concerns on the intentions of Uganda, its former ally.
- 7.2 Rwanda has a small standing army of 33,000 personnel. It consists of a ground force and an air force.
- 7.3 The UK FCO advises that the crime rate in Rwanda is low, however from 2011 to 2014 there were a number of grenade attacks. These have now ceased but vigilance is still recommended.

8. HEALTH

- 8.1 In 2009 there were more than 1.2 million cases of malaria and over 7,000 cases of tuberculosis. This has become a huge financial burden on the country and many foreign organisations provide grants to help fund the cost of this.
- 8.2 The infant mortality rate fell from 196 to 103 deaths per 1,000 live births between 2000 and 2007. In addition, maternal mortality rate fell 12% between the years 2000 and 2008.
- 8.3 Many hospitals and medical centres have basic drugs and lab facilities yet they lack specialist equipment and personnel. The genocide targeted the professional classes which left the country with a severe shortage of trained medical staff. According to the World Health Organisation, between 2000 and 2010 there were 221 registered physicians working in Rwanda.
- 8.4 Rwanda has few ambulances and even fewer that are able to render first responder medical treatment. Kigali is the main location which uses ambulances, however, they require payment either up front or upon delivery.
- 8.5 The extreme poverty in Rwanda results in high malnutrition rates among children. In order to help tackle this issue, the government set up a 'one cow per family' program in 2006 the aim of which is to ensure that children have access to cow's milk.
- 8.6 It is estimated that 3% of the population has HIV AIDS. It has been recorded that there has been an overall decline of HIV AIDS since the late 1990s. Due to the effects of the genocide and mass poverty in the country, there is still an issue in treating people who have the disease.

9. EDUCATION

- 9.1 Education has been a huge success for Rwanda. It has the highest primary school enrolment rates in Africa, which are currently 95% for boys and 98% for girls. Completion rates for primary education in 2014 were 73% for boys and 78% for girls. This was a dramatic increase on a combined average of 53% from 2008.
- 9.2 Secondary school enrolment is 28% for boys and 30% for girls. These are both up from 2011 and show that secondary school enrolment is going in the right direction.

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