



Open the Leaf to See the Flower:
*Critical Needs and Key Recommendations to Develop the
Traditional Textile Industry in Timor-Leste*



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“The motifs or *futus* that we have used until now originate from the story that our ancestors believed, of the presence of snakes in our traditional house or *uma lulik*. Our ancestors observed the colors and the flowers that the snakes have on their skins. Other *futus* are also drawn by using the leaves of the trees. The leaf must be folded; then use the teeth to mark on the corner of the leaf. Then the leaf can be opened in order to see its flower shape. These types of flowers are then used for the *futus* for the *Tais*.”

- *Tais* Weaving Group members (*Grupú Fitun Tais*), *Suku Afasa*, Baucau, July 2016

March 2017

Contents

- Foreword 1
- Executive Summary 2
- Introduction..... 3
- Recommendations..... 4
- Improving the Value Chain 4
- Raw Materials..... 4
- Tais* Production..... 5
- Product Design 6
- Retail..... 9
- Marketing 11
- Access to Finance 12
- Collective Development 14
- Certification and Branding..... 15
- Support the development of the registration and certification system for *Tais* and development of a Made in Timor-Leste brand 15
- Domestic Markets 16
- Secure a commitment from the Government of Timor-Leste to purchasing only locally-made *Tais* (once the certification system is developed, only certified *Tais*) and pay at least 50% up-front 16
- Secure a commitment from the international development community to purchase only locally-made *Tais* and *Tais* products from certified retailers 17
- Link *Tais* industry to tourism markets 18
- International Markets..... 19
- Provide technical assistance to collectives to understand foreign buyer demands and improve quality controls..... 20
- Appropriately classify *Tais* products for export so that exporting *Tais* producers benefit from duty-free provisions or other trade protections..... 21
- Educate collectives on the processes and requirements of exporting, including about their own government’s regulations 21
- Explore the possibility of developing an alliance to pool exports and negotiate with shipping companies 22
- Create a unified online presence via a traditional website or social media that gives the detailed history and background of *Tais* and links to existing online suppliers..... 22
- Ensure effective Timorese participation in international fairs through necessary skill-building in networking, presentations, and market research 23
- Enhance cooperation and coordination between *Tais* collectives and businesses through development of an industry-wide alliance or association 24
- Conclusion 24
- Annex 1 - Methodology 25

Acknowledgements

Thank you to the United States Embassy in Timor-Leste for their financial support to this study, via the “Women Weaving a Better Future Through Better Business” project.

Thank you also to collective members and coordinators from: *Grupu Feto Marenu Tais* (Lautem), *Grupu Fitun Tais* (Baucau), *Grupu Hadame Malu* (Covalima), *Grupu Feto Buka Rasik* (Bobonaro), *Grupu Halibur Tais Casa* (Ainaro), *Grupu Taum Abas* (Oecusse), *Grupu Halibur Wani-Uma* (Viqueque). Program partner staff: Maria Amado, Agostinho “Bengko” Jesus, Jose Sabino Ximenes and other staff from *Empreza Di’ak* and Alola Foundation. Writing, editing, analysis, and research by Sandler Trade LLC, Antonieta Maia, Ana Mendes Pinto da Silva, Carmenesa Soares, and Tamara Failor. Research Enumerators: Abilio do Rosario, Helder Dias Ferreira, Justina de Araujo, Joanico de Araujo, Deonizio dos Santos, Benjamin A. da Costa, and Paul Siki.

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This report was funded by a grant from the United States Department of State. The opinions, findings and conclusions stated herein are those of the authors and do not necessarily reflect those of the United States Department of State.

OPEN THE LEAF TO SEE THE FLOWER: CRITICAL NEEDS AND KEY RECOMMENDATIONS TO DEVELOP THE TRADITIONAL TEXTILE INDUSTRY IN TIMOR-LESTE

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Foreword

This study was one of the first activities of “Women Weaving a Better Future Through Better Business” program launched in late 2015. The research objective was to enhance the understanding of market opportunities and market access for women weavers in Timor-Leste. This provided an evidence base for the program activities to improve the quality of *Tais* products, the financial management and business acumen of women *Tais* collectives, and their access to international and domestic markets.

This study confirmed what many working to support the reach and sustainability of the *Tais* industry have observed or suspected. Namely, that *Tais* weavers across the country encounter many obstacles that prevent them from producing high quality *Tais* products efficiently, as well from receiving an appropriate price for those products. Similarly, even thriving and long-established *Tais* collectives—for example, ones who have partnered with NGOs or government for years and who successfully access both Timorese and foreign consumers—are underdeveloped in terms of financial and organizational management as well as effective methods to improve and promote their products, and thus are not reaching their full potential in terms of revenue and market access.

These challenges of capacity (across financial, organizational, and quality management) and access (for example, to finance, raw inputs, and marketing information) will undoubtedly require long-term and incremental work to overcome. However, the study also identified some gaps that, with sufficient will and support from key government and private sector actors, could be addressed to yield significant economic gains for women *Tais* weavers, their families and communities, in the relative short-term.

While this study assisted us to understand and document current conditions faced by *Tais* weavers and other artisan enterprises in Timor-Leste to inform the program baselines and activities, we are sharing it now with the hope that this information be used more widely to support economic empowerment and development initiatives, as well as advocacy on government policies and practices to promote and protect this important indigenous art. While further exploration is called for, the challenges and solutions outlined in this report suggest that the *Tais* industry is not only extremely valuable for its cultural significance and the income it brings to a vulnerable and marginalized segment of the population, but holds real potential in terms of capitalizing on both domestic and international demand, and generating reliable income for rural artisans in Timor-Leste.

The Asia Foundation is grateful for the support it received from the U.S. Department of State to conduct this study and to facilitate the subsequent trainings and activities, which we anticipate will have a long-standing impact on product quality and market access for the participating *Tais* collectives. The Foundation would also like to recognize the tireless work of our two local implementing partners, Alola Foundation and *Empreza Di’ak*, for their commitment, skills, and passion related to this important work. We hope this research will enable us and other implementers to further explore opportunities in this important industry for Timor-Leste. Given the importance of *Tais* in the history and culture of Timor-Leste, it is imperative for the government to recognize the need for more coordination in the promotion and further regulation of the industry. The Foundation trusts that this market research will be useful to the government and other actors in further informing programming and initiatives to develop the *Tais* industry in Timor-Leste.

Susan Marx
Country Representative
The Asia Foundation
Dili, Timor-Leste
March 2017

Executive Summary

With funding from the U.S. Embassy in Timor-Leste, The Asia Foundation (the Foundation) and two project partners, Alola Foundation (Alola) and *Empreza Di'ak*, are implementing the program “Women Weaving a Better Future through Better Business.”

Through this program, partners aim to increase market opportunities and access for women weavers in Timor-Leste; strengthen weaving collectives’ ability to produce and sell high quality products; and improve the financial management skills and business acumen of women members to support the sustainability of the weaving collectives. The program provides technical assistance to seven different women’s weaving collectives, each in a different municipality—Ainaro, Baucau, Bobonaro, Covalima, Lautem, Viqueque, and Oecusse. The purpose of the study was to establish a baseline on the operations and needs of weaving collectives, and identify opportunities for targeting support to the *Tais* industry, with a focus on domestic and international market opportunities.

Interviews and observations undertaken in this research suggest that demand for *Tais* may be increasing, or at minimum, there are untapped domestic and international markets that should be explored. The development of the *Tais* industry has the potential to provide economic opportunities to a vulnerable segment of society to revitalize and preserve traditional methods and designs.

The research identified that *Tais* weavers in Timor-Leste face significant barriers to taking full advantage of growing domestic and international demand for handmade and artisanal products. These barriers include:

- lack of access to regular and affordable raw materials;
- inconsistent quality, lack of product design services, and limited market information for new product development;
- limited sale of *Tais* products in the municipalities, despite apparent demand;
- lack of access to finance for raw materials and production;
- limited marketing of *Tais* and *Tais* products;
- lack of a certification system or Timor-Leste brand for woven products;
- limited linkages between the *Tais* industry and government procurement or tourism;
- lack of experience and knowledge for exporting.

In recognition of these barriers, recommendations have been grouped into five categories:

1. Improvements to the value chain
2. Development of a certification system and Timor-Leste brand
3. Increasing domestic markets
4. Exploring international markets
5. Development of an industry wide association for advocacy and collaboration

The barriers that make it difficult for *Tais* collectives and their members to sustain themselves are not insurmountable. There are a number of relatively quick wins including minor design modifications, and production of marketing materials that could help *Tais* producers leverage the nascent but growing tourism sector. The government has already demonstrated its commitment to establishing a certification system and, as one of the largest buyers of *Tais*, should be encouraged to commit to only purchasing certified products once the system is in place. Export markets will require a longer term commitment to improve product quality and consistency and establish relationships with intermediary agents or foreign buyers. A *Tais* industry association would help bring together industry stakeholders to develop a comprehensive strategy for development. Importantly, further support to *Tais* collectives and the industry over all has the potential to yield substantial economic and cultural benefits in the near term.

Introduction

In September 2015, The Asia Foundation (the Foundation) in Timor-Leste, Alola Foundation (Alola), and *Empreza Di'ak* began implementing a 24-month U.S. Embassy funded project called “Women Weaving a Better Future through Better Business.”

The project’s aim is to empower women and girls and promote cultural traditions of Timor-Leste through the modernization of marketing strategies and development of collectives for traditional *Tais* weavings. To accomplish this, the Foundation, *Empreza Di'ak*, and Alola are providing technical assistance to seven different women’s weaving collectives, each in a different municipality—Ainaro, Baucau, Bobonaro, Covalima, Lautem, Viqueque, and Oecusse. Most of the seven collectives identified for the project are long-time partners of Alola; they are referred to as “project collectives” in this report.

The purpose of the study was to establish a baseline on the operations and needs of women weaver collectives in Timor-Leste, and identify opportunities for targeting support to the *Tais* industry, with a focus on domestic and international market opportunities. This research was designed to compare and contrast the needs of project collectives with other *Tais* producers. Therefore, Sandler Trade LLC and the Foundation surveyed 35 artisan enterprises—the seven project collectives plus 28 small and medium-size enterprises (SMEs) based in the project municipalities. The research team conducted one-on-one interviews with the coordinators of the project collectives (the individuals responsible for day-to-day management of the collective). This quantitative data was complemented by focus group discussions with each project collective, between seven and 20 members per collective. Please see Annex 1 for a full description of the methodology.

Tais cloth is a form of traditional weaving created by the women of Timor-Leste. An essential part of the nation’s cultural heritage, *Tais* weavings are used for ceremonial adornment, home decor, and personal apparel. Before the introduction of currency and after, *Tais* has been used as a valued object of exchange in gifting and ceremonies. Additionally, the role of *Tais* in Timor-Leste culture has been credited with contributing to the maintenance and strength of Timorese identity despite years of occupation.

Tais weaving is highly seasonal and primarily takes place during the dry season. Weaving is limited to seasonal production for two primary reasons. First, because damp climates weaken thread durability, increasing production time and decreasing quality. Second, because weavers have competing agricultural responsibilities and during the rainy season they become widely unavailable for *Tais* weaving.

However, *Tais* production is not limited to weaving as the growing, harvesting, spinning, and dyeing of cotton are also critical elements of the traditional production process. Using mostly cotton threads, the cloth is created almost entirely by hand. Dyes are used to create bright colors in the *Tais*; these are mixed from plants like *taun*, *kinur*, and *teka*. Other dyes are derived from mango skin, potato leaf, cactus flowers, and turmeric. Individuals skilled in mixing dyes are sometimes compared to alchemists, using traditional recipes for creating desired colors.

The imagery and patterns of *Tais* vary greatly from region to region, and often reference significant local events or history. Imagery often includes animals such as the crocodile, upon which the creation legend of the island nation is based. Geometric patterns known as *kaif* are also employed in most *Tais*.

Weaving of *Tais* is performed primarily¹ by women, with techniques passed down from generation to generation in an oral tradition. The weaving of the *Tais* plays an integral role in Timorese life and

¹ In some cases, men and boys are involved in the production of *Tais* by project collectives, in tasks such as the

especially women's lives, shaping identity and attitudes towards them. Reportedly, prior to the 1970s, all Timorese women knew how to weave *Tais*, and viewed the skill as a prerequisite in a girl's education. The activity often serves as a community gathering as much as a chore of productivity.

Tais production carries not only important social and cultural aspects but it also has the potential to provide women with a valuable economic empowerment opportunity. This research found that collective members often use their income to pay for family expenses such as children's education, or household expenses like food.

In 2002, it was predicted that unless alternative *Tais* marketing options were identified, most *Tais* producer groups would be unable to profitably sustain their trade. At the time, the domestic market for non-traditional *Tais* relied heavily on tourists, international staff stationed in Timor-Leste, and a small minority of the Timorese community who could afford to purchase *Tais* products.² Today, *Tais* and *selendang*³ have nearly disappeared from daily wear. Most traditional *Tais* in today's Timor-Leste are worn or exchanged only during specific ceremonial events, such as Independence Restoration Day, weddings, funerals, dance performances, and festivals. According to some, the need for "traditional" or "customary" *Tais* for such events is what keeps *Tais* production going,⁴ though the interviews and observations undertaken in this research suggest that demand for *Tais* may be increasing, or at minimum, there are untapped markets that should be explored. As outlined in this report, the development of the *Tais* industry has the potential to provide economic opportunities to a vulnerable and marginalized section of society and represents an opportunity to revitalize and preserve traditional production methods and motifs.

Recommendations

Improving the Value Chain

Raw Materials

Help ensure collectives can source affordable inputs and preserve and promote traditional *Tais* making practices

Supporting the *Tais* industry is not only important for economic empowerment, but also to preserve Timor-Leste's artistic traditions, specifically traditional weaving methods and motifs. The majority of producers and stakeholders interviewed for this study are interested in or actively working to maintain Timor-Leste's traditions of municipality-, village- and sometimes, family-specific design motifs, and the use of handspun cotton and natural dyes.

While most weavers rely on manufactured thread, a few of the project collectives use traditional methods, including cotton thread and dyes they created themselves from locally-raised plants. While this study was not able to discern whether a traditional method is more profitable in terms of gross income by project collectives, it is clear from the interviews and research that collectives who seek to create *Tais* using more traditional methods and inputs, which also tend to be more time-consuming,

cultivation and harvesting of cotton and dyes, but also in weaving. In discussions undertaken for this report, some collective members mentioned that boys may learn *Tais* weaving but abandon the practice as they get older, as it is perceived in the community as women's work.

² *Traditional Crafts of Timor-Leste: A Marketing Overview*. 2002. The Alola Foundation and Oxfam.

³ *Selendang* is a slender woven panel with scarf-like dimensions that are usually worn around the neck or as a long sash by men or given as ceremonial gifts.

⁴ *Textiles of Timor: Island in the Woven Sea*. Fowler Museum Textile Series, 2014 No. 13 Hamilton and Barrkman.

face unique challenges. This combined with the dominance of cheaper imported *Tais* or *Tais*-like products raises a potential threat to the continuation of these weaving methods.

Project collectives producing traditional handspun cotton are concerned over the scarcity of natural resources. The Baucau collective explained they only harvest a small cotton crop, and that taking roots and the skin of the trees used for natural dyes can cause the tree to die. The Oecusse collective explained that traditional cotton is not available for purchase so the group plants, harvests, and processes all cotton themselves. Insects have been destroying their cotton crop and the group does not have pesticide to kill these insects. Additionally, not all the plants used for coloring are available in their area, which limits color options.

Focus group participants were asked about the biggest challenges facing their collective and 57 percent of collectives expressed that they often experience challenges related to the availability and cost of raw materials. Cash flow is challenging because of the need to pay for thread and other inputs well before *Tais* weavers are paid for their *Tais*. In addition, producers are purchasing these inputs on a retail, rather than wholesale level. Respondents also expressed that protecting natural resources used for traditional dyes and threads is an important factor. The project should work with the groups to establish a strategy to ensure sustainability of input production.

By formalizing relationships with input providers, weavers can leverage their collective purchasing power to reduce the price of inputs, for example, through wholesale instead of retail purchasing of thread and other components and infrastructure needed to create *Tais* products. Ordering in bulk will also help to reduce transportation costs and inventory shortages, and groups may be able to get wholesale discounts, while obtaining less expensive and higher quality materials. However, financing terms will need to be negotiated, as *Tais* producers generally do not have cash flow sufficient to cover the costs of bulk purchasing.

Tais Production

Deliver trainings that help improve product quality, appropriate pricing, and appeal in line with marketing plans

Fourteen (14) percent of project collectives believe teaching traditional *Tais*-making is the most important factor for strengthening their collective. The program's partner, Alola, is engaged in training several cooperatives in the municipalities to make *Tais* products including by teaching design and sewing skills to members. A second approach to training has been to bring coordinators to their center in Dili, Alola Esperanza, for a week of training on how to make *Tais* products.

Alola and Timor Aid are also working with weavers to improve *Tais* quality by focusing on the proper caring for raw materials, such as how to rinse industrial cottons before weaving to prevent their bleeding, by teaching how to use traditional dyes, and by using higher-quality methods to finish their *Tais*. It appears this is a persistent issue, despite the purchased commercial cotton threads being labeled as "guaranteed not to bleed." The Ministry of Commerce, Industry and Environment (MCIA) also works with *Tais* weavers on quality improvement.

Quality is also a matter of knowing what products and which producers can best match the needs of the customer. For example, *Hamahon Feto Timor* (HAFOTI) takes bulk orders and goes to its Oecusse producer group especially for orders of *selendangs*. Reportedly, this is because Oecusse *Tais* are very smooth and their colors are vibrant. HAFOTI plans to work with Alola to improve its weavers' *Tais* production and quality, as HAFOTI's strength is promotion and marketing of its products.

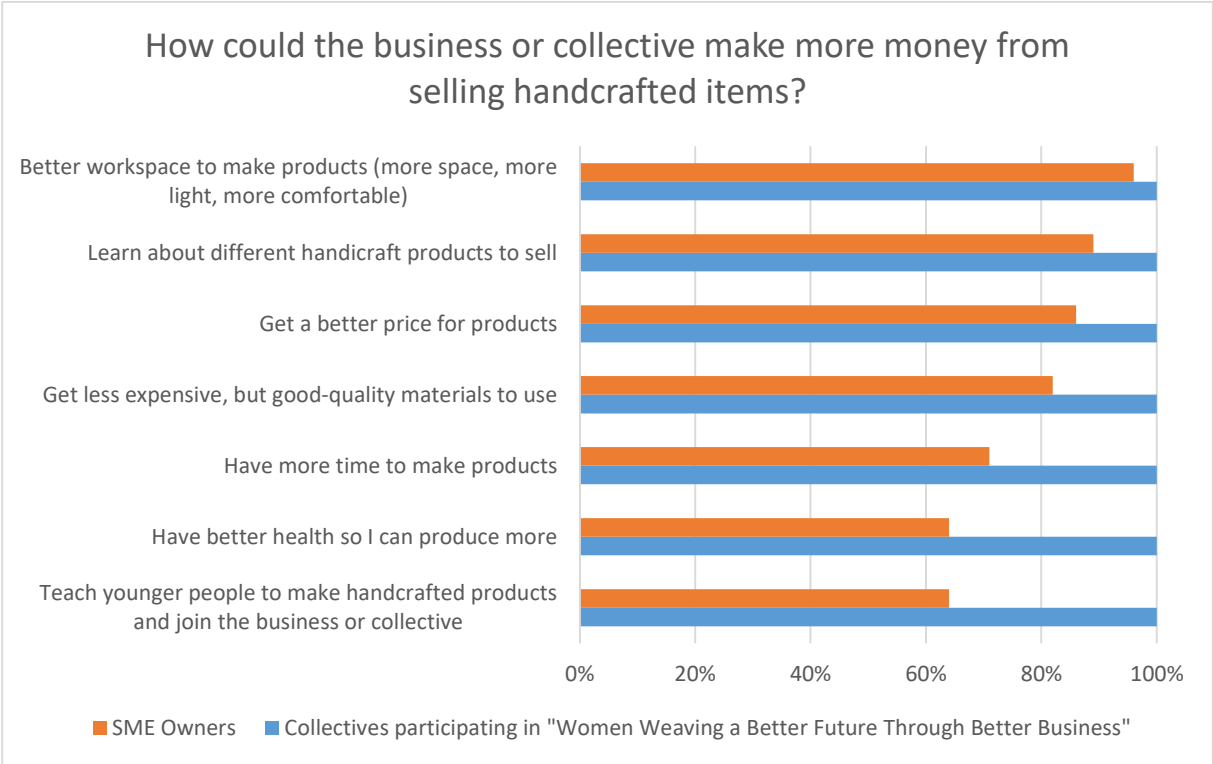
Meeting customer's quality control standards were reported as challenge by the majority of artisan enterprises, however, the issue seems to be less of a concern to project collectives. Of the SMEs and other collectives, 93 percent reported that producing quality products consistently is a challenge, while

nearly three-quarters (71 percent) of the project collectives reported consistent quality as a production challenge. It may be that project collectives deem their work to be of higher quality or are unaware of needs to improve quality assurance standards. Of the SMEs and other collectives, 89 percent reported having quality control standards and procedures in place, and 71 percent of project collectives reported this. The same proportion of project collectives provide product specifications to their artisans, and 93 percent of SMEs and other collectives do so.

All project collectives appear to experience challenges with getting a good return on the time, effort and materials invested—an issue which relates to both quality control and marketing. Specifically, 100 percent of project collectives reported sometimes or often having difficulties creating good quality items and selling products for what they are worth in time and materials. As far as SMEs and other collectives interviewed, 86 percent of respondents reported sometimes or often having difficulties selling products for what they are worth and 79 percent sometimes have difficulty crafting good quality products.

Artisan enterprises were asked how their business or collective could increase sales. The majority of owners and coordinators reported that indeed all the options included in the survey are effective ways to increase sales. Improving workspace (96 percent), and product diversification training (89 percent) are the highest ranking solutions reported by the owners of SMEs and other collectives. Notably the project collective coordinators selected all of the options provided (refer to Figure 1 below).

Figure 1: SME Owner and Coordinator Perspectives of How to Increase Sales in Handcrafted Items



Product Design

Help collectives develop product lines and provide technical assistance on product development and design

The development of private sector *Tais* product manufacturing has contributed to an increase in the diversity and price points of the products available and greater demand for *Tais* as raw material to create the products. Five years ago, non-governmental organizations such as Alola and the retail arm

of Alola, Alola Esperanza; Kor Timor; HAFOTI; Timor Aid; Women Weave; and the *Centro Treino Integral e Desenvolvimento* were producing most of the *Tais* products available for sale. These items included *Tais* “fabric” sewn into handbags, briefcases, coin purses, mail pouches, cushion covers, coasters, and *selendangs* that were sold as scarves. The *Tais* Market, in 2012, featured few *Tais* products other than *selendangs* and tote bags. During the market research visit conducted by Sandler Trade LLC for this report from June to July 2016, many changes were observed.

Tais products are now being manufactured by the private sector, in addition to the non-profit sector. This sector includes both women-and male-owned and operated small companies in Dili. Rui Carvalho was a pioneer in the industry and is now a leader in creating one-of-a-kind women’s and men’s apparel, high-fashion ladies’ shoes, unique handbags, and handmade accessories, each item created using *Tais*. The Rui Collection, founded in 2009, employs more than a dozen people. Rui Carvalho’s efforts and his company are seen to be part of a growing entrepreneurial movement in Timor-Leste.⁵ *Hametin Cultura* manufactures bags, wallets, and purses from *Tais*, as well as *belak*.⁶ Bobomet sells *Tais*, as well as handbags, tote bags, and “all kinds of bags” made from *Tais*. Other private producers include Jeitu, started by Sheila Boston (*Tais*-covered journals, earrings, and wristbands) and *Bonecas de Ataúro* (handmade fabric dolls dressed in regional *Tais* outfits, tote and day bags, book covers).

In terms of product diversity, the range of *Tais* products currently available include higher-design dresses, shirts, skirts, jackets, and uniforms designed and sold by Rui Carvalho, as well as made to order by Alola Esperanza. Equally popular shirts, skirts, and men’s jackets designed using *Tais* are sold at the MCIA store. Bracelets, *Tais*-covered post-it covers, *Tais*-covered button-accessories boxes, pillow cases, and additional *Tais* products, as well as *Tais*, can be found at a retail level at the MCIA Market, Things and Stories, the Arte Cultura and Kor Timor kiosks in Timor Plaza, the *Tais* Market, in several hotels, at the NGO offices of HAFOTI, and the Alola shops. MCIA artisans are also producing furniture.

Image 1 - Chair with *Tais* accent



Alola is looking to diversify product manufacturing in the municipalities by bringing the collective coordinators to Alola Esperanza for training. *Tais* products made directly by these weavers in Los Palos (*Grupo Feto Marenu Tais*) are small and low-cost, such as key chains and bracelets using *Tais* materials or woven as bookmarks and bracelets by *Tais* weavers.

The East Timor Women Australia (ETWA) is also working with three cooperatives (called the LO’UD group) in Los Palos to use traditional motifs to weave new products in more fashion-conscious colors, such as table runners and scarves. LO’UD is also sewing its own purses and wallets, in its headquarters, using *Tais* fabric woven by its weavers. Projeto Montanha of Aileu is making *Tais* fabric flowers as earrings and accessories, which are sold in their own shop and by Things and

Stories. Multi-group products are being designed and produced, as seen in items for sale at Things and Stories and being made at Jeitu and Kor Timor. These include carved figurines by Atauro artisans being featured on *Tais* covered journals or desk mementos; woven palm purses by Maubara palm weavers incorporating *Tais* panels; silver headdresses and crowns, neckties, soaps, or bags of coffee or tea beautifully presented encased in *Tais*-covered boxes.

The growth of the *Tais* products industry has created competition for purchase of individual *Tais* that are then used as the “fabric” for making *Tais* products.⁷ Producers of *Tais* products often buy *Tais* from

⁵ *The Young Entrepreneurs Helping to Rebuild East Timor*, Kate Stanton, February 2016, <http://www.bbc.com/news/business-35522521>

⁶ *Belak* is a kind of jewelry made of silver and commonly used during traditional ceremonies or engagement parties.

⁷ Based on researcher’s conversations in Dili (June 28, 2016, through July 4, 2016) with Alola, Jeitu, Kor Timor,

weavers at the biannual Alola Foundation Fair, or more often, when a weavers or weavers' group coordinators or other representatives come to Dili seeking to sell their products.

Those who produce higher-value *Tais* products look for sharp delineations of the *futus*, distinct colors used in the design, and quality of the weave, shape, and finishing of overall *Tais*. Some producers mentioned that they work directly with weavers to ensure that their design and quality requirements are met.

Some producers buy primarily from the weaving groups with whom they work, such as HAFOTI buying *Tais* from "their" seven municipalities. Most producers buy by the "piece," although Esperanza buys by weight after separating the *Tais* into quality groupings. For HAFOTI, the price it pays is based on various calculations, including of the kind of thread and the time needed to produce the *Tais*. Oecusse *Tais* bring a higher price because of their use of traditional thread, however, these also take longer to produce, and sometimes, to find buyers. HAFOTI sets a target for each of its groups to bring in five *Tais* every three months. The weavers determine the *Tais'* style and design.

It appears that there is enough price competition and diversity so *Tais* weavers know they have options in terms of manufacturers to whom they can sell their *Tais*. Usually *Tais* are brought to Dili for sale on a monthly basis, either by the weavers themselves, or by a group representative. Private sector *Tais* product manufacturers interviewed said that when they buy *Tais* for use as fabric, they pay approximately \$20-\$40 per *Tais*, depending on its size, amount of *futus*, number of colors, and quality. This is far less than the reported \$65-\$100 for which *Tais* could be sold directly by the weavers in their municipalities to tourists or at the Alola or MCIA Fairs.

While there are many examples of *Tais* fabric being re-purposed into fashion accessories and other products such as furniture and clothes, this research observed a general lack of cohesive product lines that could assist in making *Tais* products more attractive, particularly to tourists or consumers with larger expendable incomes (in general, the target market for the majority of the shops mentioned here).

The marketing concepts of "a line of products" or a focused "collection of product lines" being offered to buyers is used throughout the apparel, accessory, home décor, and consumer industries. A product line and collection are ways of organizing products into coherent groups; to communicate differences in seasonality, price, style, size, and design; and also to extend the popularity of and demand for a brand's current or previous product line or collection, to a new line or collection of products. Successful examples pertinent to Timor-Leste's *Tais* and *Tais* products include the product lines and collections of "[Baskets of Cambodia](#)," and [Ock Pop Tok](#) (textiles from Laos).

Case Study 1: Product line best practice

Development and use of product lines and product collections were observed in only two instances: at Ms. Augustina's stall at the *Tais* Market, and at Arte Cultura.

Ms. Augustina at the *Tais* Market makes her own *Tais* products, rather than purchasing them from *Tais* product manufacturers. She is innovative from marketing and branding perspectives in several ways. She has developed a set of small cards (pictured right) of drawings that show buyers the steps in hand-dyeing cotton and then weaving *Tais*.

In addition, she also has paired *Tais mane* and *selendangs* that are of the same color and design. This effort toward putting together individual product lines was one of just two viewed during the June-July Dili visit.

Ms. Augustina is doing so by using color and pattern. She also had several unique *Tais* products, such as necklaces with a single letter made from *Tais* fabric, which were being purchased by the (younger) women visiting Ms. Augustina's stall at the same time.

Arte Cultura, located in a kiosk at Timor Plaza, seeks to pair its products into sets. This includes handbags and luggage, and handbags and tote bags.



Because of the current lack of *Tais* product retailing as product lines and collections, buyers are often visually deluged when looking for a product category (such as for a handbag, small purse, or pillow cover). Often, there are too many items on display whose designs differ only slightly. This results in products competing with each other unnecessarily, the buyer not having the tools and knowledge (product-specific heritage information) to be able to differentiate among the items, subsequent buyer confusion, and buyers not buying. This problem is especially true in *Tais* handbags and in *Tais*, themselves. As *Tais* motif designs are essentially very active patterns, the designs compound the visual confusion.

Knowledge of product designs, color and functions that could be popular and seasonally appropriate to foreign buyers from the United States, Australia, Portugal, and other European Union and Asian nations is also very limited among *Tais* weavers and is a subject of conjecture and speculation by Timor-Leste's *Tais* product manufacturers. On the other hand, current *Tais* products, when designed and priced appropriately, are of significant interest and are being purchased by Timorese in growing numbers. This indicates an opportunity for further exploration of both local and international demand.

It is unlikely that Timor-Leste *Tais* will ever be able to compete with cheaper imitation imports manufactured in Indonesia and China; however, collectives can increase sales by improving quality, adding value through product lines that appeal to different consumer groups, and implementing targeted marketing plans to communicate the quality and diversity of their products to consumers. The institutionalization of a Timor-Leste *Tais* certification program will bolster these efforts.

Retail

Expand opportunities for sale of *Tais* products outside of Dili

There is a growing demand by Timorese consumers for *Tais* and *Tais* products. Those interviewed thought it may be due to the growth of Timor-Leste's economy. Others thought that the new MCI Market may be evolving into a major access point for the approximately 126,000 residents of Dili aged 15-64 years old to purchase *Tais* products. The new MCI Market in Lecidere, Dili, occurs Friday through Sunday weekly, and features primarily *Tais* wholesalers (not weavers) and *Tais* product makers. A third reason given is that Parliamentarians, women in high positions in the Timor-Leste Government, and other women are interested in integrating their Timor-Leste heritage into their

apparel by using *Tais* fabric integrated into the items' design. In May 2016, the government adopted a resolution on civil servant uniforms that mandates the use of *Tais* cloth.⁸ This results in local demand for apparel such as skirts, dresses, men's jackets and neckties that use *Tais* cloth.

Demand is also growing for *Tais* products from Timor-Leste residents living outside of Dili. From a product perspective, *Tais* producers are making products of interest and affordable to local women: low-cost, high-fashion-accessory handbags and purses from mass suppliers; bracelets; necklaces; earrings; and sandals. Products are made by covering the initial handbags and sandals with *Tais* fabric.

The MCIA Market gives private sector *Tais* product manufacturers the opportunity to make contacts with women from the municipalities who then buy products (earrings and bracelets made from *Tais* at \$1-2, and *Tais*-covered purses, wallets, tote bags, and sandals at up to \$10) to sell at municipal stores. At first, the municipal buyers limited their purchases to earrings but have now expanded into the additional products. The most expensive are the sandals, selling wholesale to the buyers at \$8.

After purchasing at the MCIA Market, the municipal sellers need just a week or two to sell out what they purchased and are ready to buy more from the private sector *Tais* product manufacturer. The municipal sellers have expressed an interest in purchasing an expanded selection of *Tais* products, such as higher-fashion shoes for parties and church.

A private sector *Tais* product manufacturer interviewed for this study indicated that the municipal sellers' growing demand is becoming difficult to meet, given her own production capacity. Initially she contracted the production work out to a women's group from her municipality. However, she did not always have the cash flow to pay them upon delivery, rather than when they were sold, so the collective declined to continue to work with her. Now her brother and sister are her manufacturers and when she receives a large order she relies on friends to act as additional workers.

Product manufacturers at the MCIA Market noted that they sell at a small discount to the municipal sellers so that the resellers can add a slight markup at the municipal level to account for the sellers' time and transport costs. These manufacturers credit the MCIA Market as providing an important sales channel, as well as making evident the demand for *Tais* products by residents of Dili and throughout Timor-Leste.

There currently are few economies of scale available to *Tais* weavers and *Tais* product manufacturers. It is difficult for *Tais* weavers and *Tais* product manufacturers to sell wholesale or reduce their retail prices when their inputs are purchased retail. This is especially true for the *Tais* product makers because there is a large number of inputs that must be purchased in addition to thread, depending on the product: coconut buttons, little magnets, paper for containers, zippers, sticky pads, fittings for *Tais* jewelry, glue, and sandals and purses for those who cover them with *Tais*. For example, a manufacturer/retailer noted that a roll of zippers cost \$37 from Timor Di'ak (a shop in Dili).

Production capacity constraints, as well as the lack of opportunities to receive product development and production training, are also keeping *Tais* product manufacturers from having the time and opportunity to expand their range of products to meet growing customer demand, such as for dresses, shoes, and more diverse handbag styles. Manufacturers also indicated interest in receiving business and worker management assistance. *Tais* product manufacturing also requires a new range of skill sets beyond just weaving. Occupations such as designer, production specialist, marketer, and business manager could draw on the training and interests of community members of a range of backgrounds and education levels. Manufacturing of *Tais* products could be undertaken by collective members who do not have a role or interest in agricultural production activities within the community, thus maintaining the income generation activities of the collective despite the necessary seasonality of weaving.

⁸ Government Press Release, May 31, 2016, available at <http://timor-leste.gov.tl/?p=15450&lang=en>.

Similar to the ten or more retail outlets operated by NGOs and collective partners in Dili, project collectives can capitalize on the increased demand for *Tais* products in the municipalities by producing more *Tais* finished products and opening (or expanding on existing) retail outlets in local areas. By addressing some of the barriers mentioned elsewhere in this report that inhibit collectives in expanding their production or business models, collectives could be supported to meet the high demand of this emerging market.

Marketing

Train collectives on marketing and help them develop marketing plans including identifying and addressing their different markets

Timor-Leste is actively pursuing a more comprehensive approach to increasing tourism and this presents an opportunity to expand merchandizing related to Timor-Leste and its cultural heritage. This is discussed in more detail below under the recommendation related to domestic markets and linking the *Tais* industry to tourism markets. The tourism market presents a tremendous opportunity for *Tais* producers. However, it will be important for producers to understand that the tourism market is diverse and can be segmented. First, there is demand for high-quality *Tais*, using natural dyes, and that are more traditional in design and color and can command a higher price. In the same vein, of particular interest is “older” *Tais* that connote its being part of Timor-Leste history and heritage, with distinctive *futus*. Tourists also seem particularly interested in *Tais* products that are functional (such as handbags, tote bags, post-it note holders, *Tais* jewelry), rather than serve only decorative purposes. Finally, some visitors are interested to buy larger quantities but smaller and inexpensive souvenirs that are labeled or clearly connote “Timor-Leste.”

Current marketing efforts to educate tourists and resident foreigners about *Tais* and *Tais* products, as identified through interviews and during the Dili trip, included:

- A useful, but dated and hard-to-read (because of the red print color) description of *Tais* (but not *Tais* products) in the free Dili map;
- Flyers about the HAFOTI shop, which HAFOTI staff distribute to hotels;
- One company advertisement in the Dili map (Jeitu); and
- A banner visible from the road hanging on the front of Kor Timor’s office.

The brevity of this list is of concern. Apart from coffee, *Tais* is the main traditional product representing Timor-Leste. Given the lack of a formalized marketing strategy, anecdotal evidence suggests that most information is spread by word-of-mouth. However, it was even surprising how little long-time residents knew about the many places where *Tais* products could be purchased. Easy-to-find information for tourists and resident foreigners about *Tais*, Timor-Leste’s *Tais* heritage, differences between municipalities’ motifs, and the variety of *Tais* products was non-existent. The usual answer as to where to purchase *Tais* and *Tais* products was, “the *Tais* Market,” without mention of the MCIA Market, the private sector shops, and the NGO shops.

Once in a space that sells artisanal items, the buyer finds challenges:

- Few of the products are labeled in any way, including the municipalities where the *Tais* fabric was woven, a story about the product and the weavers, and details about the dye and weaving processes;
- The lack of product organization by “product lines” and “product collection” and the plethora of slightly differing varieties within a specific product type (such as *Tais* handbags), can cause the product choice to be overwhelming and difficult to make;
- The lack of background information about each *Tais* and more expensive *Tais* products can cause buyers not to purchase these items because of buyers’ lack of understanding of the reasoning behind the higher prices;
- Few stores offer buyers business cards that could be used for later contact and purchase; and

- A number of the sales spaces are overcrowded, designed to require bending over to view many of the items, poorly lit, and dusty or buggy.

In talking with several of the owners or store operators, it was clear that they knew that having business cards, informative and interesting product labeling, and a website would be better marketing.

The two project collectives that reported using traditional methods to weave *Tais* also reported having to sell *Tais* for prices less than they were worth. Despite the ostensible demand, particularly amongst higher-income consumers, for artisanal and handmade products, this experience implies that the current customers of project collectives are more motivated by lower prices than by perceived authenticity when purchasing Timor-Leste *Tais*. This may be addressed through certification and marketing initiatives that will also seek to educate consumers regarding the time-consuming processes of traditional *Tais*, and thus raise the monetary value of such items in the eyes of future customers. However, approaches to sustaining traditional *Tais* production by addressing other challenges such as cost and access to inputs and access to capital should also be explored alongside marketing and branding approaches.

Access to Finance

Educate collectives on loan and grant opportunities

Project collectives frequently cited lack of funds to purchase materials as a barrier. However, when asked, no project collectives reported applying for grants or loans. Comparatively 29 percent (8) of SMEs and other collectives applied for at least one grant, and 18 percent (5) applied for at least one loan within the last three years. While project collectives did not prioritize learning about loan or grant opportunities, the research found that the lack of access to funds not only potentially inhibits collectives' ability to produce higher quantities of *Tais* for sale, but also the timing of their production and sale.

Collectives typically invest profits back into the production of *Tais*, by using the profits to pay for transportation or materials related to their business. Thus the timing and frequency of *Tais* sales (which is driven by factors other than demand, namely ability to travel, linkages with retailers, and marketing strategies) limits the frequency of *Tais* production, creating a vicious cycle that restricts productivity. As also noted earlier, most project collectives interviewed do not produce *Tais* during the rainy season, as the cold and wet is not conducive to weaving activities, but also because collective members are busy with agricultural work. From that perspective, the inability of women to weave during the dry season due to lack of cash to purchase the needed inputs is a huge missed opportunity.

A foremost financial constraint of Covalima and Viqueque project collectives is that weavers use sales money to meet urgent family financial needs (particularly costs associated with their children's education), hindering their ability to purchase threads and halting *Tais* production. The study found that it can sometimes take the group weeks or even months to save up enough money to buy threads needed to produce more *Tais*.

Efforts to support collectives could potentially link them with other artisans who have more experience in accessing loans. Further research should also explore whether loan opportunities are available from local banks—some collectives noted that they weren't eligible for loan programs because of the nature of their product, or they didn't want to pay interest. Training on financial planning could help collectives make a more educated decision about the risks and benefits of loans. For example, collectives' lack of access to capital was cited a barrier to producing *Tais* weavings or value-added *Tais* products, as they must re-invest profits from previous sales into new work, which means they can't create new products or buy inputs until they sell existing products.

While this report recommends working with collectives to explore opportunities to access loans, it also acknowledges that loans may not be an appropriate solution (either for the industry or for individual

weavers or collectives), and thus efforts to develop the industry must also assess other opportunities to improve the efficiency of *Tais* production and sales in other ways.

Collective Development

Support financial literacy training for collective coordinators and members

Collectives face multiple financial challenges. According to the coordinators, six out of seven project collectives do not have enough money to pay for materials when needed, six have difficulty planning for expenditures, and five often or sometimes have problems keeping financial records, and five reported their group sometimes have problems knowing how much to charge for a product. On the positive, five reported that receiving payment from the customer was never a problem.

Figure 2: Frequency of Financial Problems Occurring in Project Collectives, According to Collective Coordinator Interviews

Financial Challenges Faced	Often		Sometimes		Never	
	Frequency	Percent	Frequency	Percent	Frequency	Percent
Having enough money to pay for the materials, when needed	4	57%	2	29%	1	14%
Receiving payment from the customer after selling the item	0	0%	2	29%	5	71%
Planning how much money is available to spend and how it will be spent	3	43%	3	43%	1	14%
Keeping records of money spent and earned	4	57%	1	14%	2	29%
Paying the owner and other artisans in the business for the sale of products	1	14%	3	43%	3	43%
Knowing how much to charge for a product	1	14%	4	57%	2	29%

This research attempted to assess the level of income provided to *Tais* weavers. Focus groups with project collectives questioned whether their income from *Tais* sales was sufficient to meet the financial needs of the collectives over the last year; most indicated that *Tais* sales did not meet the financial needs of project collectives during the last year. The research also attempted to assess sale revenues or incomes; however, figures provided by project collective members did not seem reliable. This was further emphasized by the *Empreza Di'ak* assessment, which found that 65 percent of project collective members had never attended school, and that 100% of the seven project collectives did not have a bookkeeping system in place. When asked about their training needs, collective members prioritized financial management as their second priority after promotion.⁹ Thus this research further highlighted the need for basic financial literacy and management training for collectives, not just on budgeting and planning, but also on numeracy skills and bookkeeping.¹⁰

⁹ The *Empreza Di'ak* needs assessment was carried out from February to April 2016. The team interviewed 120 project collective members. The assessment is available from The Asia Foundation.

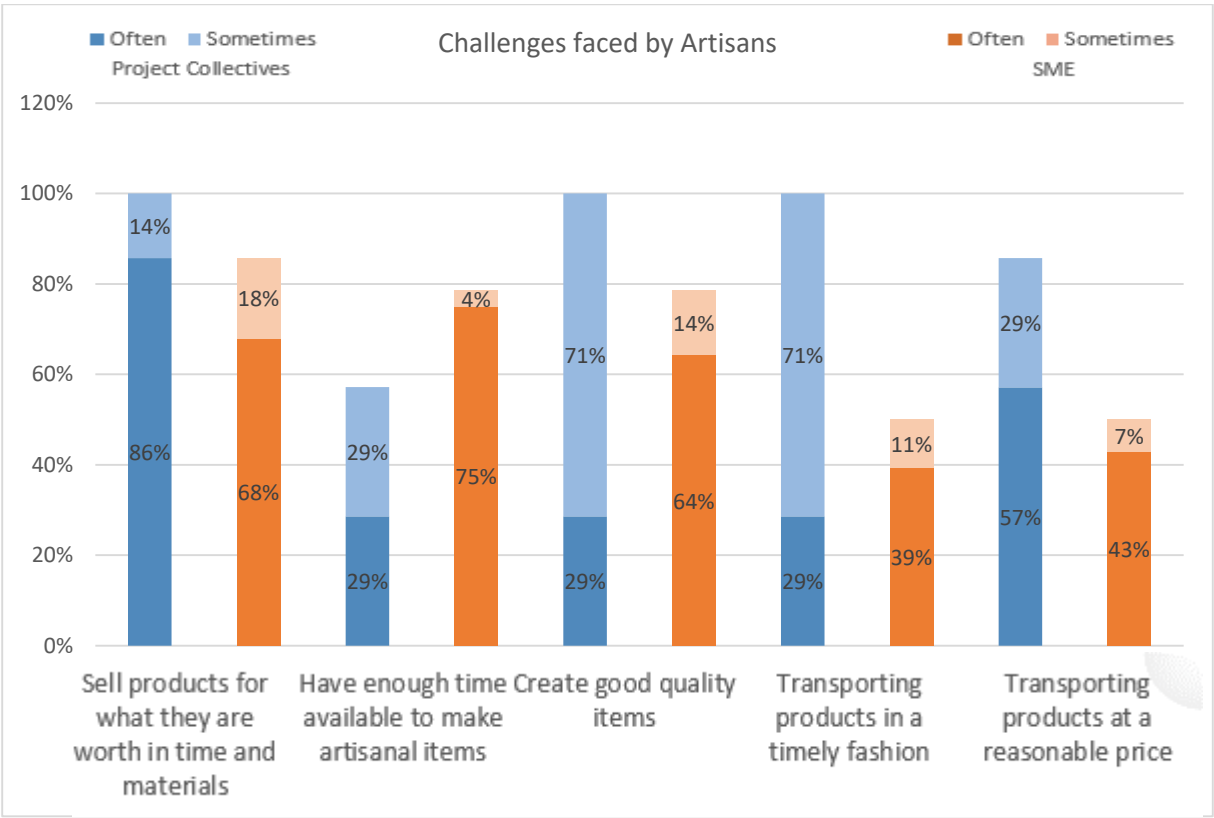
¹⁰ The US Embassy-funded project is addressing these needs through trainings provided by *Empreza Di'ak*.

Collective Development

Strengthen collectives' capacity to develop harmonized purchasing, transportation, and investment strategies

There currently are few economies of scale available to individual *Tais* weavers and *Tais* product manufacturers. It is difficult for *Tais* weavers and *Tais* product manufacturers to sell wholesale or reduce their retail prices when their inputs are purchased at retail prices. This was confirmed by project collective coordinators: 86 percent said they often face the challenge of selling products for a reasonable price, taking into consideration the cost of labor and other material inputs. The second most frequent challenge expressed by project collective coordinators is transporting products to sell in domestic or international markets outside of their municipality, at a reasonable price (57 percent). This is not so surprising since many of the collectives are based in remote areas and need to travel to municipal centers or Dili to purchase materials and/or sell products.

Figure 3: Frequency of challenges faced by Artisans



Case Study 2: Village Income Generating Groups

The experience of Union Aid Abroad (APHEDA)¹ in Timor-Leste is that when village residents choose to form income generating groups, they make products or offer services that provide an immediate and steady flow of income. Based on APHEDA's experience and analysis of the production and payback cycle, weaving *Tais* does not meet that criterion. Currently, income from selling *Tais* comes only several times a year, as compared to the sale of agricultural products, which generates revenues more often when sold locally.

APHEDA's experience offers an insight into how municipal weaving groups, if they broaden their scope to design and make a wider variety of *Tais* products and thus generate income throughout the year, could attract more and, especially, younger, members.

The time and expense of public transportation was one clear bottleneck that arose from the research. A number of *Tais* product manufacturers and those who work with them to design products expressed

the need for more investment in the industry in terms of weaving and manufacturing infrastructure, such as sewing machines, well-lit community weaving areas, and climate-controlled storage spaces. Lack of dedicated space to work and store *Tais* and lack of equipment such as sewing machines to create *Tais* products were also identified as barriers by collectives. All of these issues are beyond the capacity of individual weavers and require collectives to coordinate the bulk purchase of raw materials and delivery of products to sellers. Similarly manufacturing infrastructure needs to be developed as a group asset. More in-depth qualitative research should be undertaken to more clearly discern the material impact of such barriers on production, and identify creative solutions.

Certification and Branding

Support the development of the registration and certification system for *Tais* and development of a Made in Timor-Leste brand

The Government of Timor-Leste, primarily through MCIA, and the State Secretariat of Arts and Culture (SSAC), have become active participants in the artisan sector. SSAC is working with UNESCO, *Tais*-focused NGOs, and 27 weaver groups to identify Community-based Inventories of Intangible Cultural Heritage (ICH) and develop a registration and certification system for each municipality's *Tais* and their distinctive threads, colors, and design motifs. When implemented, this system could potentially lay the groundwork for branding *Tais* and *Tais* products in the global marketplace, which would increase their intrinsic value to buyers.

The purposes of the certification effort are to increase the quality of the *Tais* being produced and to establish a standard of design that would also translate into their higher value in the global marketplace. The government's role would be to establish a system of certification and registration that would provide standards of design, motifs, threads used, and other aspects of the *Tais* from each municipality. Each registered *Tais* would be labeled indicating the municipality (and country) of origin. Some of the work of distinguishing *Tais* designs by geography has already been done. For example, Timor Aid has already identified *Tais* motifs by municipality, sub-district, and family. The government is currently consulting with 27 different producer groups to identify standards and is relying on Alola, Timor Aid, and others to do the technical work along with a consultant in Indonesia.

MCIA sees its primary role in the legislative arena and has already drafted some laws, but none have been finalized. During interviews, MCIA noted its interest in obtaining model legislation and legal assistance in drafting the pertinent laws.

In so far as branding products from Timor-Leste, a "Made in Timor-Leste" certification program would heighten interest and confidence in branded products. Marketing and branding products from Timor-Leste would not only increase confidence of authenticity, and potentially increase the value, but could also link with ongoing efforts at a general tourism campaign for Timor-Leste. Merchandise plays an integral part in the branding and marketing of a country and effective use of material, cultural items and unique designs could heighten the experience of visitors.

Branding is a way that Timor-Leste can differentiate its *Tais* and *Tais* products from woven items from other countries. An effort to "brand" a country's products often includes developing and using a logo and tagline that are on a tag or label that is attached to every handwoven or other artisanal product made in the country.

Next steps could include:

1. Recommend that all participants in this industry commit to establishing and following regulations for a nationwide, Timor-Leste branding program for *Tais* within a certain number of years.
2. Identify the benefits and drawbacks as well as the specific legislative, branding, and marketing needs and process that would comprise the government's actions to:
 - a. Formally certify *Tais* and products made with *Tais* according to municipality-specific standards. This would include draft certification and intellectual property (design/trademark) protection legislation; and examples used by other nations and jurisdictions; and/or
 - b. Identify, license, and label products as created, assembled, and/or grown in Timor-Leste.
3. Since these certification and branding systems are not mutually exclusive, undertake a stakeholder decision-making process that would result in a prioritized adoption plan with deadlines. This process could be led by the newly organized industry association with close involvement of pertinent government officials and UNESCO representatives.
4. Assist *Tais* retailers and *Tais* product producers to have interesting and useful product tags that: tell the story of the weaver or manufacturer, or at least general information regarding *Tais*; note whether the product is made from commercial or natural dyes; mention the item's municipality of origin; and provide information about its motifs.
5. For *Tais* and *Tais* products intended for the collector or museum or hotel shop buyer, develop and utilize a certificate that verifies authenticity, as well as identifies the weaver and collective, and information about its history and location.

The recommended certification system, including municipality certifications which will help highlight and monetize regional variations in *Tais* weaving styles and motifs, can further support traditional weaving methods by including a special level of certification for *Tais* that use only or mostly locally sourced cotton thread, dyes, and other inputs.

Domestic Markets

Secure a commitment from the Government of Timor-Leste to purchasing only locally-made *Tais* (once the certification system is developed, only certified *Tais*) and pay at least 50% up-front

The government is a major buyer of *Tais* products in Timor-Leste. An example of a typical government bulk order for a *Tais* producer is to make 200-300 tote bags. Each tote bag had a traditional palm liner (*ikadero*) inside the zippered tote bag to provide it with a semi-rigid shape, and *Tais* fabric comprises the outer bag. In the case of one bulk order, the full retail price is approximately \$25 per bag, but the bulk order or wholesale price is around \$20 each.

According to product manufacturers, an order of that size can be fulfilled in six to seven weeks. When such an order is received, the product manufacturers contact the weavers to obtain the necessary *Tais* fabric quantities. Prices for *Tais* are reduced between 10 percent to 20 percent, depending on the supplier, for bulk orders. It is unlikely, however, that any of the product manufacturer's other inputs (such as zippers and thread) were purchased at wholesale prices. In 2016, Timor-Leste's Presidency of the Council of Portuguese nations increased demand for such *Tais* products to be given to participants at conferences and meetings.

According to interviews, processing orders for the government can be problematic. The government often requires such orders to be filled urgently. After delivery, however, those interviewed noted that it can take a very long time to receive payment. This is very difficult for producers. There is a regulation that requires the government to pay 50 percent up front, which has now been adopted as a

requirement by at least one of the producers. A second producer was unable to obtain an up-front payment from the government and reported waiting months for the money.

Private sector and NGO marketing approaches to attract government purchases vary from providing written materials and catalogs to utilizing “advisors” that approach officials in advance of events or giveaways. There is a concern among *Tais* product manufacturers that product information provided by them to the government is then used to “shop” for lower prices from other suppliers. In one case, the government used one company’s catalog to show to a second company who then provided a less expensive bid for *Tais* products to be copied and manufactured in Indonesia. This suggests that the Government of Timor-Leste does not have a procurement requirement (or at least, one that is enforced) to purchase products made in Timor-Leste.

Interviews found that a significant number of *Tais* purchased for *Tais* products come from West Timor, and suggested a few possible reasons: 1) *Tais* from West Timor are less expensive than those woven in Timor-Leste because of West Timorese weavers’ easier access to materials such as cotton and cotton thread that are produced in Indonesia; 2) West Timorese groups are seen to be better trained and also are perceived by some to produce higher-quality weaves than in Timor-Leste, in terms of dyes and styles; or 3) because domestic demand outstrips the domestic supply available to the *Tais* product producers.¹¹ Some estimates as to the percentage of all *Tais* made into *Tais* products that come from West Timor are as high as 70 percent, but there has been no verification. It is adequate to say that a large number of *Tais* from West Timor are being sold as ‘Timor-Leste’ *Tais*.

Notably, 50 percent of SMEs and other collectives interviewed received at least one order from the government (local or national) within the last year. In contrast, only 14 percent of project collectives reported the government as a buyer. Given that *Tais* are frequently featured in government events and ceremonies, this shows an expansion opportunity for project collectives and other artisan weavers.

The certification of Timor-Leste *Tais* is an opportunity to secure commitment from the government of Timor-Leste and other bulk purchasers of *Tais* products to procure only guaranteed locally-made products. In the absence of a certification system, these bulk purchasers could commit to buying only from a pre-approved list of collectives or companies that have passed a vetting process that indicates that all or a minimum percentage of their products and inputs are locally sourced. The role of the MCI and other ministries and agencies supporting the *Tais* industry can be leveraged, in this case for advocacy within government to support local traditional industries with public dollars. It is recommended that this is one of the first initiatives of the national *Tais* association, but this could also be initiated by collectives who are already linked together through their engagement with specific retailers or organizations, such as Alola, Things and Stories, HAFOTI, or the U.S. Embassy funded project.

[Secure a commitment from the international development community to purchase only locally-made *Tais* and *Tais* products from certified retailers](#)

Given that donors, international NGOs, and local NGOs in Timor-Leste also frequently gift *selendangs* during celebrations and other auspicious events such as the arrival or departure of a dignitary or colleague, there is also an opportunity for foreign aid donors, such as the governments of the United States or Australia, to commit to requiring that *Tais* and *Tais* products purchased with donor funds are guaranteed to be local and hand-made. While this may not make as significant an impact on the incomes of local producers of *Tais*, it would be a valuable gesture and public demonstration of support

¹¹ It is unknown whether this is because municipal weavers or their representatives are unable to travel to Dili to bring *Tais* to sell on a regular basis, or due to other supply, quality, communication, or coordination constraints.

for local entrepreneurs, especially considering that many donors have focused efforts and resources on the *Tais* industry in recent years.

Furthermore, these government and international commitments could have a knock-on effect for schools and churches, which also purchase *Tais* in high volume. Of the SMEs and other collectives, 39 percent reported schools or churches constituted the third highest volume buyer, and nearly half (46 percent) had received orders from schools and churches within the last year. For comparison, only 14 percent of the project collectives sell to schools and churches. This presents another opportunity for project collectives as well as other SMEs and collectives to encourage and advocate for increased local purchasing by schools (public as well as non-government) and churches, which, like the government, may also currently source large amounts of *Tais* from cheaper Indonesian manufacturers.

Link *Tais* industry to tourism markets

Tourism has been identified as the second largest non-oil sector, next to coffee, and efforts are underway to increase tourist arrivals in coming years. Tourists are an obvious opportunity to inject external revenue into the Timor-Leste economy, and *Tais* industry stakeholders, including the government, have already targeted them. In addition to coordinating the artisan market in Lecidere, MCIA has also built or rebuilt markets with permanent stalls such as the *Tais* Market in Colmera, and the artisan stalls at the tourist area in Maubara. Retailers, such as Things and Stories, Arte Cultura, and Kor Timor, described notable increases in sales with the arrival of large numbers of tourists, such as when the USNS Mercy Ship came to Dili.

Beginning in 2016 and continuing through 2017, P&O Carnival cruises (the Pacific Dawn and Pacific Eden) are scheduled to stop in Dili a few times per year. The Dili stops are in partnership with local tour company, Dive Trek & Camp Timor. This initiative has already had some impact on the nascent tourism sector, such as the establishment of a tourist hop-on, hop-off bus service called the “Dili Explorer” with the support of the Australian Government funding. The “Dili Explorer” offers several routes for passengers,¹² and their tourist map clearly denotes the locations of the *Tais* Market and the Lecidere MCIA Market. The cruise brochure’s description of Dili includes the “must-see” sights of the Resistance Museum and Santa Cruz Cemetery. Although it does not mention *Tais*, it does read, “The Alola Foundation Centre & Shop is the very best, as it is a women's collective that supports local craftswomen through the sale of traditional arts. The very good prices are clearly marked, and haggling is neither necessary nor accepted.” Reportedly, other cruise lines will begin visiting Dili starting in early 2017.

The number of hotels in Dili has increased since 2012 and a number sell items made in or about Timor-Leste. Many sell *Tais*; fewer sell *Tais* products. Of the 29 Dili hotels listed on Booking.com, only four indicated they had a gift shop. Hotel Timor and Hotel Timor Plaza offer exceptional examples of inviting retail opportunities co-located with hotels, in that they actually showcase the products effectively, and the gift shop in Hotel Timor is staffed by knowledgeable salespeople (this is likely related to the fact that these shops are managed or curated by Things and Stories).

Tais is one of the most popular souvenirs for visitors to the country, and tourists are a large source of business for *Tais* sellers such as Alola Esperanza and Things and Stories (which has retail locations in the Timor Plaza Hotel, Hotel Timor, and the Museum of the Resistance), and vendors at the *Tais* Market. In recognition of this, questions related to sales posed to the project collectives and other SMEs and collectives included responses related to tourists as customers.

Collective coordinators identified all buyer types who had purchased their products within the past year. They were then asked which three types of buyers purchased the most volume of products.¹³

¹² <http://marketdevelopmentfacility.org/wp-content/uploads/2016/09/Screen-Shot-2016-09-02-at-4.34.07-PM.png>

¹³ Coordinators reported their collectives’ three highest volume buyer types. This study did not capture and analyze high-volume buyer types based on raw unit sales.

Overall, the top three buyers reported by project collective coordinators were: local friends and family, NGOs, and tourists in Dili.

Notably, 43 percent of the project collectives reported their third-highest volume buyer type as tourists in Dili, as compared to only 7 percent of SMEs and other collectives. Furthermore, 86 percent of the project collectives reported selling to Dili tourists while only 14 percent of SMEs and other municipal collectives are doing so. Only 14 percent of project collectives sell to tourists in their community, while 32 percent of SMEs and other collectives reported selling to tourists in their community.

Interestingly, Baucau and Covalima groups are the only two project collectives selling to a hotel, and both ranked their hotel buyer to be within their top three purchasers. More interestingly, these two groups did not appear to have established, formal relationships with their hotel buyers. The coordinator of *Grupu Fitun Tais* has a friend who works at a hotel, and who would call her when the hotel needed more *Tais* for their shop. In the case of *Grupu Hadame Malu*, they would first attempt to sell all their *Tais* to Alola Esperanza, but if not all of the *Tais* was sold, would take the remainder to nearby hotels to attempt to sell them. This begs the question of whether collectives could benefit from a more systematic or organized arrangement for selling to hotel gift shops (including targeted marketing), but the second case also suggests that hotels do not offer an optimum price for *Tais*, compared to NGO shops like Alola Esperanza.

While ensuring collectives produce the types of *Tais* and *Tais* products that appeal to people of various different nationalities will be important to tap the tourist market, also important will be to leverage the various opportunities to engage with tourists during their often short visits to the country. This could include efforts to expand the availability of *Tais* and *Tais* products for tourists; coordinating with cruise lines to increase passenger exposure to information about *Tais* in advance of their visit¹⁴; ensuring information about *Tais* and where to purchase *Tais* is available online (including linking to the tourism marketing website developed by The Asia Foundation with the Ministry of Tourism¹⁵); marketing the “Made in Timor-Leste” certification system once it is finalized; and exploring cultural tourism opportunities that would enable tourists to see how *Tais* is made and possibly visit and stay in collective’s communities, to witness other traditional processes in addition to weaving, such as harvesting the components for traditional thread, the spinning and dyeing of threads, and the process for selecting a pattern.

Related to this last point, some of the organizations who are involved in *Tais* production and sales, such as HAFOTI, have also experimented in cultural tourism, i.e. taking tourists or expats who reside in Dili to the rural areas to witness agricultural production. This form of tourism complements the government’s overall tourism strategy of emphasizing cultural and community-based tourism, and could yield another source of income as well as publicity for collectives based outside of Dili. Of course, each collective would have to carefully weigh the benefits and disadvantages of attempting such a venture, and assess whether the management capacity exists to take it on. If collectives were interested, they could speak with local NGOs (such as Haburas), international NGOs (such as The Hummingfish Foundation), and rural communities, who have experience in this type of work in Timor-Leste, to explore the possibility of partnerships or simply share lessons learned.

International Markets

There is very strong, global recognition of and respect for handmade, artisanal items, which is accompanied by growing demand. The items that are designed to meet this demand can be entirely handmade artisanal products, or may incorporate components or embellishments that are artisanal

¹⁴ There will also be two Paul Gauguin cruises stopping in Dili in May and June 2017. An art historian and photography experts will be on the cruises who could be a contact for talking about *Tais* and *Tais* products in preparation of the passengers for their Dili stop.

¹⁵ <http://www.timorleste.tl/>

and handmade. As the artisanal, handmade nature of products is itself a specific draw for consumers, this makes the presentation of artisanal items with stories about the people who made them a critical element of a successful marketing campaign.

Greater connectivity—of customers, and of information flows—means there are greater opportunities for artisan businesses to access meaningful market information. On the other hand, it also implies increased competition amongst international artisan groups, and groups located in isolated rural areas with relatively little access to technology are at a disadvantage. Changing trends and customers' interests add additional burden to artisans to keep up with changing demands, price competitively, and remain abreast of trends. This often means that artisans must accelerate their design and production cycles, and be more proactive. When not considering the intrinsic heritage and culture represented in these items, Timor-Leste's *Tais* and *Tais* products must compete in color and pattern with hand-woven textiles from South America (Peru, Bolivia) and Guatemala. They also compete with products of more similar in pattern from Laos, and hand-woven textiles similar in color, pattern, and material (cotton) from Indonesia (including West Timor).

Internationally none of these countries use the U.S. dollar as their currency, which puts *Tais* and *Tais* products from Timor-Leste at a price disadvantage. Peru and Guatemala are U.S. Free Trade Agreement partners so products competitive with those from Timor-Leste enter the U.S. duty-free. In addition, transport costs from each of these competitor supplying countries, except for areas of Indonesia and Laos, are typically less expensive.

Provide technical assistance to collectives to understand foreign buyer demands and improve quality controls

This research found that most producers had not considered exporting their product. Perceived challenges expressed by project collectives related to exporting included quality standards, cost of transportation, language barriers, distance to Dili, and lack of intermediaries for exporting. However, all of the project collectives expressed interest in exporting *Tais* and requested help to do so.

All (100 percent) of the project collectives, and 65 percent of SMEs and other collectives reported they do not know who to sell products to outside of Timor-Leste and nearly three quarters (71 percent) do not know what products people in other countries want to buy. For those who did know what international customers want to purchase, many cited not having the capacity to produce the products as their main concern.

Meeting customer's quality control standards were reported as challenge by the majority of artisan enterprises, however, the issue seems to be less of a concern to project collectives compared to SMEs and other collectives. While 93 percent of SMEs and other collectives reported producing quality products consistently is a challenge, less than three-quarters (71 percent) of the project collectives reported consistent quality as a production challenge. Research did not capture why project collectives reported lower rates of quality issues; results may indicate project collectives deem their work to be of higher quality or are unaware of needs to improve quality assurance standards.

As a positive, the majority of all artisan enterprises participating in this study report having quality control standards and procedures in place including, 89 percent of SMEs and other collectives and 71 percent of the project collectives. Additionally, 93 percent of SMEs and other collectives and 71 percent of the project collectives provide product specifications to their artisans.

The findings on export-related challenges also suggest a clear need to develop the capacity of *Tais* collectives and enterprises to target international markets in terms of marketing as well as quality standards. As marketing and quality control capacity of producers relates to domestic as well as international markets, these issues have been discussed in recommendations above.

Appropriately classify *Tais* products for export so that exporting *Tais* producers benefit from duty-free provisions or other trade protections

Generalized System of Preferences Program

Some of Timor-Leste's woven handcrafts can enter into major international markets duty-free through individual countries' systems of trade preferences. Each country gives preferences to different products; often a least-developed country like Timor-Leste is able to export into developed countries a larger group of products.¹⁶

The United States Generalized System of Preferences (GSP) is a trade preference program under which the United States provides duty-free treatment to more than 3,500 imports from beneficiary developing countries. Timor-Leste was designated as a Least Developed Beneficiary Developing Country (LDBDC) under the GSP program in 2007. As a LDBDC, Timor-Leste is eligible to export duty-free into the U.S. market the 3,500 different products eligible from all GSP countries, plus an additional 1,400 products reserved just from LDBDCs. Additionally, the United States and Timor-Leste concluded a handicraft certification agreement soon after Timor-Leste became a GSP beneficiary that makes certified hand-loomed and folklore textile articles from Timor-Leste eligible for GSP duty-free treatment, such as wall-hangings and pillow covers.¹⁷ Certified hand-loomed cotton fabrics are also eligible to enter the U.S. market duty-free under Harmonized Tariff Schedule (HTS) headings 5208 and 5209. The term "certified hand-loomed fabrics" means fabrics made on a hand loom (i.e., a non-power-driven loom) by a cottage industry and which, prior to exportation, have been certified by an official of a government agency of the country where the fabrics were produced to have been so made.¹⁸

As of July 1, 2016, President Obama approved the addition of 23 different types of "travel goods" to be added to GSP if those travel goods are imported only from least-developed GSP countries and sub-Saharan African countries. As a result of these provisions, *Tais* and certain *Tais* products such as jewelry and head apparel using *Tais*, pillow covers, handbags, tote bags, change purses, tote bags, and any other "container" made with *Tais* that is used to carry items (such as sports bags, computer bags, luggage, etc.) are eligible to enter the U.S. market free of duty. This saves up to 20 percent per item in taxes for U.S. importers, and is available only to least-developed suppliers such as Timor-Leste, Cambodia, and Myanmar, along with African countries and those having free trade agreements with the United States.

Tais products that are not eligible for GSP duty-free treatment include sandals, shoes, scarves/*selendang*, table runners, and apparel (unless it is made of 70 percent or more of silk).

While currently *Tais* exports from Timor-Leste to the United States are small in quantity, the GSP creates an opportunity and added incentive to further explore export markets in the U.S. and countries with similar regulations.

Educate collectives on the processes and requirements of exporting, including about their own government's regulations

This study found that very few of the surveyed SMEs and none of the project collectives were exporting products. When focus group participants were asked about challenges of selling *Tais* and *Tais* products

¹⁶ Analysis of data compiled from the U.S. Department of Commerce and U.S. International Trade Commission shows that thousands of dollars' worth of *Tais* has been imported to the U.S. in the last several years. These exports likely did not take advantage of duty exemptions because they were improperly categorized.

¹⁷ Doing Business in Timor-Leste: 2013 Country Commercial Guide for U.S. Companies
<http://photos.state.gov/libraries/timor-leste/788/pdfs/2013-ccg-sept-23-final.pdf>

¹⁸ Harmonized Tariff Schedule of the United States (2016) Supplement-1, CHAPTER 52, COTTON, Note 4.

outside of Timor-Leste, most respondents expressed they did not have the necessary knowledge and skills to sell abroad.

Perceptions of challenges specific to exporting include: difficulty meeting Timor-Leste export and importing countries requirements; international shipping; not having connections to international buyers; and not knowing what products are internationally marketable. The project collectives were not as concerned about export limitations, and the most significant differences were between their responses and those of SMEs and other collectives related to difficulty in meeting Timor-Leste export requirements, and importing countries' requirements (customs, duties, tariffs documentation), as well as international shipping. Remarkably, only 14 percent of the project collectives referred to these issues as "limiting", whereas 58 to 84 percent of SMEs and other collectives reported them as barriers to selling outside Timor-Leste. This mostly likely due to a lack of experience or awareness of export requirements.

Gaining an awareness of favorable or unfavorable conditions and requirements for export would be the first step in advocating for changes to the legal framework to protect or promote locally-made *Tais*. Such efforts could link to and build on collaboration of *Tais* collectives around national and municipal certifications for *Tais* and the formation of an industry-wide association.

Explore the possibility of developing an alliance to pool exports and negotiate with shipping companies

While the vast majority of artisan enterprises interviewed are not presently exporting products (less than 7 percent), those who do reported that they currently sell items in Australia through an intermediary. It is worth noting that despite the lack of exporting reported by interviewed collectives and SMEs, this research did encounter a small number of websites that sell Timor-Leste *Tais* in Australia and the United States.

Research on shipping costs revealed that options to ship internationally from Timor-Leste are limited, expensive, and slow, given that most of the operators do not ship "less than container load" (LCL) amounts from Dili. Bollore Logistics (Dili) did provide a sea freight export quotation for SDV Logistics East Timor to ship LCL from Dili to the United States. The quotation (valid through August 31, 2016) was for a maximum two-cubic-meter size shipment. The total cost included \$800.46 for local handling in Dili (e.g., export customs clearance, fumigation, export documentation) and \$1582 for ocean freight to New York or to Long Beach, California, totaling \$2382.46 for a transit time of 42 days. On a global scale, according to Federal Express, Timor-Leste is one of the most expensive countries to ship to and from.

By developing an industry-wide alliance or association and stronger market linkage, *Tais* collectives could explore opportunities to pool resources to ship larger quantities of *Tais* from multiple collectives to Australia and the U.S., thus reducing per item shipping costs.

Create a unified online presence via a traditional website or social media that gives the detailed history and background of *Tais* and links to existing online suppliers

There are several websites that sell *Tais* products, however, none found are located in Timor-Leste. None of the NGOs or retail outlets in Timor-Leste sell online. Few, such as HAFOTI and Alola, have a website or Facebook presence that showcases their work, products, and/or groups. Despite the proliferation of mobile phone use, and spike in social media users in Timor-Leste in recent years, to a large extent traditional websites and effective online marketing strategies are still lacking. Improving the access to information and appeal for local products is likely to have a positive impact on the availability and acquisition of products from Timor-Leste.

The off-shore half-dozen websites who currently sell woven items from Timor-Leste belong to individual businesses or NGOs based mostly in Australia, that either sell items from Timor-Leste only, or in conjunction with items made by artisans in several countries. Two Timorese *Tais* sellers, Projeto Montanha and Things and Stories, have Facebook pages as their only online presence.

Store owners and operators interviewed in Dili indicated that they realized a website would help their marketing and sales efforts. They also realized the value of sharing background information on *Tais*, such as the history, artistic process, and geographic diversity of the product, in marketing.

A website to promote Timor-Leste *Tais*, developed in conjunction with national and municipal certifications and competitions, and featuring information on *Tais* as well as catalogs and links to online sellers, could be created for the joint benefit of members of the national *Tais* association or other collaborating collectives. The possibility of establishing online markets or just internet presence for individual collectives or the *Tais* association, operating out of Timor-Leste, could be explored—for example, using marketplace features on Facebook. In the meantime, a web portal that consolidates the information and purchasing opportunities for Timor-Leste *Tais* in one place, augmented by personal stories and histories of the individual collectives, would fill an important gap in terms of promoting *Tais* products and improving linkages between *Tais* producers and potential customers.

Ensure effective Timorese participation in international fairs through necessary skill-building in networking, presentations, and market research

MCIA has sought to market *Tais* and *Tais* products internationally. However, when a *Tais* product producer was supported to attend the Milan Expo, it was reported that the Ministry had not adequately arranged for appointments with buyers, and it was difficult to do so after arriving. MCIA recently marketed products from Timor-Leste in Shanghai, China, in partnership with several private sector companies. MCIA's Shanghai trade show presence was reported to surprise a number of other private sector and NGO *Tais* product manufacturers. In addition, they did not appear to showcase the growing diversity of Timor-Leste's handmade and artisanal products.

At the Santa Fe International Folk Art Market, both Kor Timor and Alola had sales booths in 2013 and 2015. The extent of their marketing was to identify Timor-Leste as the source of their items (through banners and maps) and, in Kor Timor's case, to provide a brochure in English about the organization. They did not identify ahead of time potential buyers to meet with them at less crowded moments or before or after the Market hours. They also did not label their products. Their business cards were provided by the Market, itself, but without follow-up contact information.

Things and Stories also reported that it showcases its more than 400 products, developed collaboratively with 60 *Tais* producer groups, at international and domestic trade shows. However, interviews conducted for this study did not cover their specific experience at these trade shows.

The majority of artisan enterprises interviewed reported not knowing what products are marketable to international customers. On the other hand, 31 percent of SMEs and other collectives, and 28.6 percent of project collectives reported knowing what international customers want to purchase but not having the capacity to produce the products. This highlights a gap and an opportunity to better leverage Timorese participation in international product fairs and expos, such as the support provided by the Foundation and Alola to project collectives to participate in international fairs in the United States and/or Australia, via the U.S. Embassy funding. A sharing of experiences across *Tais* industry stakeholders who have traveled to international fairs, as well as targeted capacity development on *Tais* marketing, is recommended to ensure that collectives can make the most of this international exposure. This can also help prepare collectives for the competitive application processes required by many international artisan fairs.

Enhance cooperation and coordination between *Tais* collectives and businesses through development of an industry-wide alliance or association

For the *Tais* industry to grow, it is important to strengthen networks and linkages between producers, buyers, suppliers, retailers, the Government of Timor-Leste, and other industry stakeholders. Furthermore, when project collective coordinators were asked to identify the biggest factor they believe will make their group stronger, over half responded that the single biggest factor would be municipal-based businesses or collectives working together. The *Tais* association can be a platform and opportunity to increase formal linkages and the sharing of information not only between *Tais* producers and various individual and organizational consumers, but also between collectives and input providers, and between collectives and potential consumers.

Conclusion

This study has confirmed numerous barriers facing *Tais* weaving groups and individuals, and many of these challenges are unsurprising as they face much of the population in Timor-Leste—for example, low financial literacy, remoteness from domestic economic centers, and lack of international linkages. However, this study also offers a review of opportunities that, if leveraged, could be instrumental in greatly increasing production and sales of Timor-Leste *Tais* and *Tais* products, thus granting sustainability for *Tais* producers, not only in terms of incomes but also artistic traditions. By suggesting a range of possible interventions, this research provides a starting point to investigate further solutions to the identified obstacles and capacity gaps, which should be undertaken in partnership with local civil society and government stakeholders working in space, and of course with *Tais* artisans and entrepreneurs. Fundamentally, the further development of the *Tais* industry has the potential to provide economic opportunities to a vulnerable and marginalized section of society and represents an opportunity to revitalize and preserve a critical part of Timorese culture.

Annex 1 - Methodology

Sandler Trade LLC and the Foundation surveyed 35 artisan enterprises—the seven project collectives plus 28 small and medium-size enterprises (SMEs) and other collectives based in the project municipalities. The purpose of the study was to establish a baseline on the operations and needs of women weaver collectives in Timor-Leste, and identify opportunities for targeting support to the *Tais* industry, with a focus on domestic and international market opportunities.

All 28 SMEs and other collectives are located in the seven targeted municipalities (four per municipality) to enable comparisons with project collectives. SMEs and other collectives were identified by the Foundation through the Business Development Institute (IADE) enterprise directory, Ministry of Commerce and Industry (MCIA), and other sources. Not all of the non-project enterprises or collectives interviewed specialize in *Tais*, but the results of their interviews help illuminate issues common to small artisan businesses in Timor-Leste.

The Foundation managed and implemented all fieldwork conducted with collectives and SMEs. To complete the individual surveys, the Foundation hired and trained seven enumerators. To test the survey methodology, the project conducted pilot surveys with *Tais* market sellers in Dili. Survey responses were collected using Samsung Galaxy tablet computers to enable real-time tracking of results and closer monitoring for quality control purposes. Then, each of the coordinators of the project collectives (the individuals responsible for day-to-day management of the collective) completed a one-on-one interview with a Timorese enumerator. This quantitative data was complemented by focus group discussions with each project collective, between seven and 20 members per collective. Focus group discussions and collective coordinator surveys were conducted July 12-27, 2016 by two multi-lingual Foundation staff members. All discussion responses were audio recorded and translated to English. After completion of the data collection process, aggregated responses were translated and submitted to Sandler Trade LLC for analysis.

Finally, the research methodology included key informant interviews with Dili-based *Tais*-selling businesses, organizations, and exporters, NGOs, pertinent government officials, and other stakeholders. Stakeholder interviews were semi-structured, open-ended, and completed by Sandler Trade with the assistance of a translator June 23-July 5, 2016. Below is the list of individuals who participated in the one-on-one interviews as well as other organizations involved in *Tais* production. A full copy of the methodology and questionnaires are available upon request.

Participant Information for Individual Surveys and Focus Group Discussions

Project <i>Tais</i> collectives	Municipality
<i>Grupu Feto Marenu Tais</i>	Lautem
<i>Grupu Fitun Tais</i>	Baucau
<i>Grupu Hadame Malu</i>	Covalima
<i>Grupu Feto Buka Rasik</i>	Bobonaro
<i>Grupu Halibur Tais Casa</i>	Ainaro
<i>Grupu Taum Abas</i>	Oecusse
<i>Grupu Halibur Wani-Uma</i>	Viqueque

Other SMEs or artisan collectives	Type of business	Municipality
Jakarta 2	Individually owned or family owned business	Ainaro
Dulmadik Ana	Individually owned or family owned business	Ainaro
Grupu haburas riapusu ne'e hau rasik mak hari	Individually owned or family owned business	Ainaro
Hamoris Servisu ba Feto Nian	Individually owned or family owned business	Ainaro
Hadia Moris	Collective	Baucau
Hadomi Natureja	Collective	Baucau
Soru <i>Tais</i>	Collective	Baucau
Mata Dalan	Collective	Baucau
Fatin Fini	Individually owned or family owned business	Bobonaro
Grupu Fundasaun Alola	Collective	Bobonaro
Centru Treinamentu Carpintaria Sao Jose	Individually owned or family owned business	Bobonaro
Companhia Artilin Unipesoal Lda	Individually owned or family owned business	Bobonaro
Feto fitun fronteira	Collective	Oecusse
Grupu Suni	Individually owned or family owned business	Oecusse
Moris Hamutuk	Collective	Oecusse
Maco	Individually owned or family owned business	Oecusse
Beiramar	Collective	Lautem
Grupu Kiak	Collective	Lautem
Assalaino	Collective	Lautem
Mawar Indah	Collective	Lautem
Buka Moris	Individually owned or family owned business	Covalima
Cruz Minarai	Collective	Covalima
Halibur Maudemo	Collective	Covalima
Feto Foin Sae	Collective	Lautem
Haburas Cultura	Collective	Viqueque
Olobai Star	Individually owned or family owned business	Viqueque
Feto Vulneravel	Individually owned or family owned business	Viqueque
Haburas Natureja	Individually owned or family owned business	Viqueque

Tais Product Manufacturing, NGO, Government, Retail, Market, and Other Pertinent Industry Participants

Dili

Organization	Contact Person	Website or Facebook
Alola Esperanza	Ofelia Neves Napalao	http://www.alolafoundation.org/
Alola Foundation	Jose Sabino Ximenes	http://www.alolafoundation.org/
APHEDA Timor-Leste	Elizabeth Araujo	http://apheda.org.au/
<i>Arte Cultura</i>	Rufina dos Santos	http://www.timorplaza.com/stores/arte-cultura
SDV Logistics/Bollore Logistics	Diamantino da Cruz	www.bollore-logistics.com
<i>Hametin Cultura, Dili Tais Market</i>	Jose de Fatima de Cruz	Unavailable
Dili <i>Tais</i> Market	Augustina and others	Unavailable
Dili weekend market	Visited several booths	Unavailable
<i>Empreza Di'ak</i>	Agostinho Sena de Jesus, National Training Coordinator	http://empreza-diak.com/
<i>Fundasaun Oriente</i>	Graca Viegas	http://www.foriente.pt/122/east-timor.htm#.V_Uta-ArJ3s
Guide Post Magazine and Maps	Leith Carroll, Proprietor	http://www.guideposttimor.com/
<i>Grupu Estrela</i> (at MCIA Market and individually) and Marco Pessoa Company	Arsenia Pessoa Vaz	Unavailable
<i>Grupu Tais Timor Bobomet</i>	Unavailable	Unavailable
HAFOTI	Dortia Kese, Director	http://www.hafoti.org
Jeitu	Sheila Cooper	Unavailable
Kor Timor	Jacky Ximenes	http://www.timorplaza.com/stores/kor-timor
Ministry of Commerce, Industry and Environment (MCIA)	Antonio de Costa, Director General, Industry and Cooperatives	http://www.mcia.gov.tl/
Peace Corps Timor-Leste	Janet Utchet, Country Director	https://www.peacecorps.gov/timor-leste/
People's Trading Company	Junko	Unavailable
Rui Collection	Rui Carvalho, Founder and Designer	http://ruicollections.blogspot.com/2012/03/history-of-tais-as-traditional-textile.html
Solida Fashion	Unavailable	Unavailable
The Asia Foundation, Tourism Project	Gobie Rajalingam, Program Innovation Specialist	www.asiafoundation.org
Things and Stories	Joao Ferro	https://www.facebook.com/ThingsandStories/
Timor Aid	Rosalia Soares, Team Leader Cultura, and Florentino	www.timoraid.org

Organization	Contact Person	Website or Facebook
	Sarmiento, Chief Executive Officer	

Outside of Dili

Organization	Contact Person	Website or Facebook
Cipriana Amaral and family	Cipriana Amaral (c/o Helder Amaral)	Unavailable
<i>Grupu Marenu Tais</i>	Mr. Armino Moniz	Unavailable
Koperativa Lo'ud, Los Palos	c/o Deb Salvagno	https://www.facebook.com/etwa-supporting-women-in-Timor-Leste-310960747919/photos/?tab=album&album_id=10152479591857920
Maubara Market (Liquica)	Unavailable	Unavailable

