

Traditional Crafts of Timor Leste: A Marketing Overview



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Acronyms

APSC.TL	Asia Pacific Support Collective Timor <i>Lorosae</i>
ACS	Australian Customs Service
AQIS	Australian Quarantine & Inspection Services
AUSAID	Australian Agency for International Development
CIDA	Canadian International Development Agency
ETWAVE	East Timorese women against violence
FOB	Free on Board
GST	Goods and Services Tax
IFAT	International Federation of Alternative Trade
IKFET	<i>Industria Kik Feto</i> East Timor
IRC	International Rescue Committee
LAHO	<i>Loron Aban Hahu Ohin</i>
METHS	Melbourne East Timorese Handicrafts Support
NGO	Non government organization
OMT	<i>Organisasaun del Mulheres Timorese</i>
OPMT	<i>Organisasaun Popular de Mulheres Timorese</i>
OTL	<i>Oportunidade Timor Lorosae</i>
PKF	Peace Keeping Force
QUIPS	Quick Impact Projects
RMIT	Royal Melbourne Institute of Technology
UNHCR	United Nations High Commission for Refugees
UNICEF	United Nations International Children's Emergency Fund
UNTAET	United Nations Transitional Authority for East Timor
USAID	United States Agency for International Development

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Project Background

In October 2001, an exhibition of East Timorese traditional hand woven cloth called *tais* was displayed during the Melbourne International Arts Festival in Australia. The exhibition was warmly received by the Melbourne community generating interest and support from a variety of individuals, local government councils, NGOs, unions and other organizations. A meeting was held in November 2001 to bring together a range of interested parties, and the "Melbourne East Timorese Handicrafts Support" (METHS) collective was formed. One of the objectives of the collective is to investigate the possibilities of supporting *tais* production groups in East Timor, through exploring the viability of exporting *tais* products to Australia while maintaining a culturally sensitive and long-term approach.

This Marketing Overview has been initiated in response to the objective of the METHS collective and has focused on *tais* production and marketing. The concept for the project is a result of discussions between METHS, The Aloia Foundation (based in East Timor's capital, Dili), Oxfam East Timor (staff based in Dili) and an independent consultant¹.

The Marketing Overview proposal was designed and developed by the consultant in November 2001. Financial, logistical and report editing support was provided by Oxfam Great Britain and Oxfam Hong Kong and logistical and in-kind support provided by the Aloia Foundation and the Asia Pacific Support Collective Timor Loro'sae (APSC.TL). Representatives from these four organisations also provided guidance to the project through the project steering committee which met regularly throughout the project implementation period.

Additional information regarding the existing Australian distribution network of *tais*, has been provided by METHS, various persons active in

marketing *tais* in Australia and by a report drafted by two business students² at the Royal Melbourne Institute of Technology (RMIT). The RMIT report contains additional information regarding the current market for *tais* in Australia, transport options from Dili to Melbourne, relevant customs duties/tariffs and regulations, quarantine requirements, and an analysis of competing products and recommendations.

Summary

The ongoing international response following the post-ballot violence in East Timor in 1999 has included a number of projects aimed at revitalizing cultural industries as a strategy to generate income for women. However, it has become evident that many of the production groups have experienced difficulties identifying markets and retailing the produce generated from these projects. Domestic demand for *tais* products is limited and currently aimed at international personnel stationed in East Timor. As the international community in East Timor scales down (scaling down accelerated with independence on 20 May 2002), domestic demand for *tais* products is expected to decline. Although there are some small-scale projects linking a limited number of producers to buyers in Australia, there is at present no existing infrastructure or policy environment for international export. In order to improve the viability of projects supporting production of cultural products, and to provide genuine income generation opportunities for women, alternative marketing strategies are critical.

This Study has focused primarily on the *tais* industry. Research has encompassed the historic and cultural relevance of *tais*, the current production system, marketing (both domestic and to Australia), the current constraints and future areas of research required. The methodology employed for the research has been qualitative and participatory, engaging producer groups in seven districts, marketing bodies, national and international NGOs, donor bodies and government.

Overarching Goal³:

To identify viable economic opportunities and elevate the status of women involved in traditional crafts industries of East Timor, focusing on production of *tais*.

Aims of This Study :

To investigate the current marketing of *tais* products and recommend potential marketing strategies which reflect the priorities and needs of the producers including preservation of the cultural significance of East Timorese traditional industries. Objectives were:

1. To gain a comprehensive understanding of the historical and social context of *tais* as a cultural product.
2. To collect current information regarding the current situation of the *tais* industry.
3. To give voice to those currently involved at all levels of production, management and marketing of *tais*.
4. To investigate the current export market to Australia, identifying constraints and opportunities.
5. To identify training needs and sources for product development support.
6. To provide an accurate and current source of information to those stakeholders interested in developing the *tais* industry including national and international NGOs, trade and export organizations and government departments.

Summary of Findings

- Development of the *tais* industry has the potential to provide economic improvement to a vulnerable and marginalized section of society and represents an opportunity to preserve or revitalize traditional production methods and motifs.
- There has been increasing interest in establishing export markets from various business enterprises and organizations. However, sustainable development of the *tais* industry (including all stages of production and international marketing) will require further analysis into production issues and potential domestic and international markets.
- At present there are small-scale linkages between producers in several districts and interested groups and buyers in Australia. These linkages are informal and rely heavily on individuals. There has not been any significant mainstream retailing of *tais* products in Australia to date.
- Further research is required to better assess export markets in Australia and elsewhere such as the U.S.A. and Europe (both with strong currencies and large art and handicraft markets). In particular, two types of international markets should be further investigated – a market for functional or decorative products incorporating *tais* fabric (such as bedspreads, pillow covers, clothes etc) and a niche collectors market for *tais* made using traditional methods and incorporating location specific motifs.
- Inclusive consultation with those who would be involved in all levels of production and management is fundamental to ensure that



Senora Lorensa Lela

appropriate attention is given to issues of ethical management, transparency and responsibility, ownership, cultural sensitivity and sustainability.

- Research participants identified that their potential and immediate opportunities for income generation are based on their skills in *tais* production. Knowledge of traditional designs and techniques still exist and women are enthusiastic to utilize these skills and to pass them on to future generations.
- Production groups acknowledge that the lack of organizational structure and business knowledge limits the group's capacity to turn their skills into a profitable income generation activity. Both producer and marketing groups have requested training in basic business management (such as accounting, costing, marketing and communications), quality control and product development.
- The difficulties that were most regularly voiced by producers both in Dili and the districts were limited financial support and resources, time constraints for production and limited marketing opportunities.
- Recommendations to government from district and Dili based producer groups and national NGOs, focused on the need to enact legislation in order to protect and preserve the *tais* industry as a cultural product of East Timor.
- The preservation of traditional knowledge and art is immeasurable in its value as a heritage resource for future generations. *Tais* and other handicrafts are an invaluable expression of traditional knowledge and East Timorese culture.



Introduction

Women in East Timor have traditionally provided the mainstay of essential cultural industries that provide products such as textiles, carvings and ceramics. One of the most prominent of these traditional crafts is the hand woven fabric called *tais*.



Ceramics and woven baskets in market in Dili

Tais are the basis of the East Timorese traditional clothing and costume, and originally were produced in two main styles, male and female. The *mane* (male) *tais* are a large piece of cloth worn in sarong style around the man's waist. The *feto* (female) *tais* have the ends of the cloths sewn together and resemble a long tube in which a woman steps into and wears like a dress. In recent years an addition to these two styles is the *selendang*, a long slender piece of cloth used for giving tribute by placing ceremoniously around the neck.

Designs and colours are specifically associated with districts and illustrate the environmental, cultural and linguistic differences between districts and the communities that inhabit them. It is through the art of *tais* production that a woven narration of the paradigms and stories of East Timor's history have been recorded. The cultural relevance of *tais* to the East Timorese people, combined with the significance of preserving traditional crafts and knowledge of indigenous people, has been the inspiration and motivation for conducting this study.

Economic Situation of Women in East Timor

The traditional role of women in the household and community has played a large part in determining women's previous involvement in economic activities. Most rural women are engaged in subsistence agricultural activities. Women and children have responsibility for a large proportion of daily activities such as collecting fuel-wood and water and caring for livestock and some food crops.

Due to the high rate of illiteracy and limited access to education for women (only 39% of adult women are considered literate⁴), opportunities for income generation have been limited to activities such as operating small kiosks to sell basic necessities, sewing, and handicrafts.

Women in East Timor have endured years of violent oppression, abuse of human rights, displacement and sexual violence. Women-headed households (through abandonment or as widows) are particularly vulnerable with limited economic and material means to survive. It is estimated that 10% of households in 2002 are women-headed⁵. Economic opportunities that are appropriate for women's skill and levels of education and that can assist women in achieving self-sufficiency within the household are essential.

Methodology

The research and consultation have focused on the existing local networks of *tais* producers and marketing groups in East Timor. The approach, focus and methodology utilized was qualitative, participatory, inclusive and engaging, taking into account the varied levels of literacy and education of the members of the producer and marketing groups.

Research participants were identified through the assistance of the Alola Foundation and APSC.TL as well as through other women's organizations such as the OMT (*Organisasaun del Mulheres Timorese*) and OPMT (*Organisasaun Popular de Mulheres Timorese*)⁶. Two East Timorese staff were trained and involved in the design of the participatory research methods used, including participatory workshops and personal interviews. This has allowed for a genuine building of trust and confidence for participants involved in the workshops to speak openly, share information and give personal testimonies. It has also assisted with language, logistical and cultural issues and maximized integrity of the project with the local communities.



Hanging mane tais



Traders at the tais market in Dili

The primary target group for the research were producers themselves. The focus was on developing a thorough understanding of the production process, including the capacity to produce and market products and the constraints on production and marketing. Only groups currently producing and marketing were selected for the research to enable the team to gain an accurate and current understanding of the *tais* industry.

The activities for the participatory workshops were designed by staff and a training consultant and were initially piloted in *Baucau* district in May 2002. Information collected during the workshops included:

- The history of *tais* and their evolution during the different periods (Portuguese, Indonesian and Transitional)
- The cultural and social relevance of *tais* to the East Timorese people
- The production process
- Knowledge and techniques employed such as traditional methods of spinning and dyeing thread and weaving
- The current economic situation of producer groups
- The constraints, opportunities and aspirations of producer groups
- The current marketing situation
- Recommendations from the groups

The one-day district workshops consisted of four main activities:

1. *Halimar Konensemento* (game to get to know each other): an interactive activity aimed at allowing the facilitators and participants to familiarize themselves with each other.
2. *Paradigma* (paradigms): the large group was divided into three and each group was requested to draw and explain *tais* production and the social context of a different period :- Portuguese, Indonesian and transitional.
3. *Difficuldade ho oportunidade* (difficulties and opportunities): In a large group participants were requested to identify constraints and strengths of their group, the opportunities they see available

to them and practical ways they can realize those opportunities.

4. *Halimar Lao Ba Oin* (walk forward): an active game aimed at assisting the workshop facilitators to readdress areas they felt were not fully covered or explained, and an opportunity for the participants to realize the knowledge and skills within their group.

Dili based producer groups were also consulted and an interview method was employed covering the same focus areas as in the workshops.

The secondary target group for consultation were organizations, retail outlets, markets and individual sellers who are currently engaged in domestic marketing of *tais*. For these groups interviews were conducted covering a specific range of questions and topics including :-

- Geographic location of *tais* sourced by the marketing body
- The arrangement between producer and marketing body
- Previous and current levels of sales in the domestic market
- Personal opinions and knowledge of the marketing body

The third target group for consultation were national NGOs and donor organisations who have previously or are currently involved in supporting or funding *tais* production groups and the Secretary of State for Industry and Tourism⁷. Interviews were conducted focusing on the following :

- Aim and objectives of the organization
- What support or funding was made available to producer groups ?
- What technical support was made available ?
- What marketing strategies were employed ?
- Personal opinions and experiences of working with producer groups
- What future support to producer groups can be offered by these organizations



Participants in the Dili workshop

Groups Involved in District Workshops

Group Name	Location/District	Date	Number
<i>Grupo Naroman</i>	Suco Bucoli/Baucau	28/05/02	28
NGO LAHO	Suco Triloka/Baucau	29/05/02	5
<i>Grupo Dame</i>	Suco Bagaia/Baucau	30/05/02	6
<i>Fitun Naroman</i>	Suco Lore1/Los Palos	07/06/02	16
OMT (FF)/ <i>Rai Naroman</i>	Los Palos	08/06/02	15
<i>Grupo Memo</i>	Maliana	21/06/02	9
<i>Grupo Ritabou /Lahomea</i>	Maliana	22/06/02	21
<i>Boy malae</i>	Suai	04/07/02	8
<i>Grupo Senora Ermelinda</i>	Suai	05/07/02	9
<i>OMT Maqelap</i>	Oe-cusse	24/07/02	18
<i>Box Sufa Feto Faluk Maqelap</i>	Oe-cusse	25/07/02	17
<i>Grupo Senora Leonia de Araujo</i>	Ainaro	30/07/02	37
<i>Grupo Maulo</i>	Ainaro	31/07/02	20

Dili Based Groups Involved in the Research

Person Interviewed	Group Name	Location	Date
Sabina Koio	<i>Moris hamutuk</i>	<i>Bekorak</i>	26/05/02
Angelica Cardoso	<i>Grupo Aimutin</i>	<i>Aimutin</i>	14/06/02
Marta Soares	<i>Karya Indah Bebonok</i>	<i>Bebonok</i>	17/06/02
Fransisca Cardoso	<i>Tais Bebonok</i>	<i>Bebonok</i>	17/06/02
Rosalia Dos Reis	<i>Lases</i>	<i>Bebonok</i>	26/06/02
Lydia de yesus	<i>Garuda 1</i>	<i>Batais</i>	26/06/02
Lorensa Lela	<i>Buras Tais</i>	<i>Tai Besi</i>	27/06/02
Maria Fatima Pinto	<i>Fundasaun Hari Aumetan</i>	<i>Bekora</i>	08/08/02

Marketing Bodies

Category	Location	Dates	Number
Stall owners	<i>Tais Market Dili</i>	16/07/02	5
Street sellers	Dili	15/07/02	5
<i>Tais shops</i>	Dili	17/07/02-05/08/02	4

NGOs and Donor Organisations

Name of Organisation	Date
UNICEF	22/07/02
CIDA	22/07/02
UNHCR	06/08/02
AUSAID	02/07/02
USAID	02/07/02
Madre Canosian Sisters	12/07/02
Timor Aid <i>Tais Workshop</i>	19/07/02
<i>Fokupers</i>	06/08/02
APSC. TL	06/08/02
ETWAVE- East Timorese women against violence	12/07/02
IKFET- <i>Industria Kik Feto</i> East Timor	07/08/02
<i>Yayasan Murak Rai</i>	25/07/02

Socioeconomic Situation

Social, Historical and Economic Significance of Crafts Within Local Communities

The designs and techniques to produce *tais* have been handed down a matrilineal lineage since before the time of Portuguese colonialism in East Timor. During the colonial period producing *tais* was considered to be women's work. Grandmothers would sit to weave and teach the craft to younger women, under the traditional *adat* houses, while grandfathers and younger men carried out other activities. The term *adat* refers to traditional customs and the *adat* house refers to the community ceremonial building.

Tais were produced mostly as common clothing in the *mane/feto* (male/female) style. Specific pieces of significant value were produced and used in traditional *adat* ceremonies. During marriage negotiations, the bride's family provides a *tais* set consisting of both *mane* and *feto tais*, and the groom's family provides livestock and money as well as other assets. Before the 1970s it was reported that all women knew how to weave *tais*, and it was considered by many to be a prerequisite for marriage.

Tais were also used on occasions such as funerals and the *kor-metan* ceremonies (a funeral anniversary held one year after a person's death). Other than through these processes *tais* were generally not a trade commodity to be bartered or sold. The weavers themselves traditionally produced raw materials such as cotton fibre and plant dyes. Although commercially produced threads from Portugal and Indonesia were available these were not generally purchased as it was considered an expensive luxury.

Tais production became more prominent as an income generation activity during the period of the Indonesian occupation in East Timor (1975 to 1999). Many producers have commented that although fluctuating and unreliable, *tais* prices during the transitional period (late 1999-May 2002) have been considerably higher than during Indonesian times due to the presence of international personnel able to pay higher prices. However the market was more stable during the Indonesian period as the main clientele were Indonesian military personnel who were stationed in East Timor in large numbers.

Colours, designs and motifs were adjusted to requests from customers. *Selendangs* the long slender *tais*

pieces used for giving tribute at ceremonies also became popular during this time. As *tais* became available for sale, men became involved in the marketing and production of *tais*.

During Indonesian times the constraints to production were many, including the difficulty and expense of transportation from the districts as well as the general need to prioritise access to food and attend to issues of security. During the latter period of the Indonesian period as violence and destruction became more widespread, the supply of traditional raw materials such as cotton and plants for making dyes began to diminish. This is attributed to increased use of

pesticides and defoliants as well as burning of vegetation. In addition, Indonesian threads became more available in shops and markets and appeared to be a quicker and easier option for weavers.

Reports on prices paid for commercial thread and for *tais* during the later period of Indonesian occupation vary greatly and are difficult to standardise due to the large fluctuation in exchange rates. For commercial thread the price for one skein varied from Rp 350 to 5,000 and for large packets of skeins from Rp 50,000 to 200,000. For *tais*, prices vary between districts and were estimated to range between Rp 250,000 and 500,000 for *mane tais*, from Rp 150,000 to 200,000 for *feto tais*, and from Rp 100,000 to 250,000 for *Selendang*.



Working with traditional cotton

Role of Women and Tais Within East Timorese Communities

East Timor is a nation that has strong Catholic institutions and religious practices. In many places, Catholicism is coupled with traditional animist beliefs. Social structures are intricate and tightly connected. Families are usually extended and not always limited to first kin relationships due to the inclusion within families of some of the many orphans, widows and displaced people from the period prior to and during the violence of 1999.

In East Timor, women play a key role in family and community life, including an often unrecognized role in subsistence agricultural activities and small scale economic initiatives. Women headed households are common. At the core of East Timorese society is the family unit and the institution of marriage. *Tais* hold an important place in marriage arrangements and ceremonies, especially in district areas. Quality *tais* for *adat* ceremonies are still sought after, with master weavers (male and female) holding an esteemed place within communities in recognition of their skills.

Geography of Tais Production

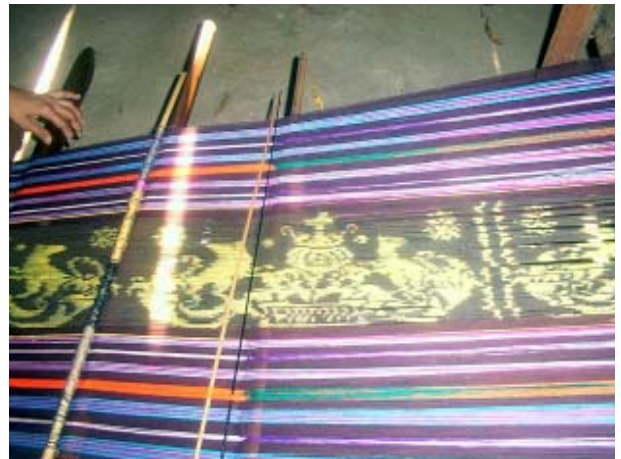
Although men have become involved in *tais* production and especially marketing, mostly it is still considered women's work. Weavers produce either as individuals in their own homes or sometimes in small groups if facilities such as a building are available. Current producer groups appear to be comprised of the poorer sections of society with limited literacy and education and few other work opportunities.

For the purpose of this project and the time frame, seven districts were selected on the basis of accessibility to groups in those districts (Dili, Baucau, Los Palos, Suai, Maliana, Oe-cusse and Ainaro). However *tais* are also produced in varying quantities and qualities in districts not included in this project.

Designs, Influences, Origins and Cultural Associations

Tais from different districts have their own specific colours and some have their own designs or motifs and cultural associations. Some of the motifs and symbols seen today were designed prior to and in early Portuguese times.

In Maliana weavers use the angel motif to accompany each person in their life and work. In Suai and other districts letters and words also accompany the motifs. Oe-cusse *tais* are designed using motifs such as the gecko, teak and taro leaves. Flowers are a design used by many districts and appear to have come from



Tais design

the Portuguese influence. The *leka* design, which consists of stripes running through the *tais*, represents the number of cows expected in a bride price arrangement.

The Evolution of Tais

Originally worn or only used in ceremonies, *tais* are now marketed as a commercial product. There have been many different products developed using *tais* fabric in an attempt to expand the market. In Ainaro District one group has been making tablecloths, bedclothes, pillowcases, bags, serviettes etc. Other groups in Dili have become quite innovative with new product designs. Mobile phone cases made from *tais* can be seen in the *tais* market along with a variety of designs of hats and bags. *Tais* can also be produced custom made with a name or word woven into the design.

In Bagia, Baucau District, women told the story of the crocodile which is a common motif used in *tais* design.

It is told that in the time before, there was a young boy who one day came across a baby crocodile, who would die if it did not soon reach the ocean. The boy picked up the baby crocodile and carried it to the water and watched it swim away. The crocodile said to the boy, that he would never forget the kindness. Many years later the crocodile came back to the beach, and met the boy again. But on this day the crocodile was very hungry and it crossed his mind to take advantage of the boy's trust and eat him. The decision did not come easy however, so the crocodile went to ask the advice of a monkey in a tree nearby. The monkey told the crocodile how stupid it would be to eat the boy who helped him into life. So the crocodile asked a bird, who expressed the same opinion. Finally the crocodile asked the wise old snake, who told him he should be ashamed to think such a thing, as he owed his life to the young boy. So the crocodile went back to the beach to meet with the young boy. The boy climbed on his back and they swam out into the blue ocean together. They swam for days, until the crocodile could swim no more. Then he said goodbye to his young friend and as he died his body was transformed into the land of Timor.

Madre Domingas Mesquita from the Canosian Sisters gave this explanation of the rooster motif.

The rooster motif holds a special significance to the East Timorese people. It represents the fierce bravery of the rooster as it goes into the cockfight. Roosters are prize possessions and are thought to have the gift of foresight. When a rooster crows constantly, people take care, as it is thought that the rooster is predicting and calling attention to a bad situation that will happen soon. The rooster is also used in traditional Lulik (magic) ceremonies and medicines. It is thought to be closely linked to creation, calling in the day, and flying up to the trees at nightfall.

Production Methods

The choice of raw materials for production must be taken into account for marketing especially with regard to cultural authenticity as well as the aesthetic character of the final product. For example, there are two types of threads used, traditional handspun cotton produced in East Timor and commercially produced threads imported from Indonesia. The locally produced threads are coloured with traditional plant dyes which produce more neutral colours and are commonly area-specific whereas imported threads have already been commercially dyed and produce *tais* with much brighter colours.

In Dili as well as the districts, weavers produce either in their own homes or sometimes in small groups if facilities are available. With current infrastructure in East Timor having been mostly destroyed during the violence of 1999, not many groups have access to an adequate building to use for production of *tais*.

The materials originally used in *tais* production were hand-spun cotton and natural plant dyes made from the leaves and bark of trees, as well as fruit rinds and skins. *Tais* are woven on a simple manual backstrap bamboo loom, using techniques similar to the method using for producing *Ikat* in Indonesia and India. The looms are placed on the ground and a strap from the loom or a secure place is placed around the weaver's lower back for support when weaving for long periods of time.

Looms are strung vertically between two bamboo end sticks; the motif design is strung into the vertical threads (warp) using pre-dyed threads, which are coloured using a tie-dye technique.

The horizontal threads (weft) are then interwoven into the warp, ordering the design. The method is intricate and exact with higher quality and accuracy determined by the clarity of the designs within the finished product.

The time required to produce *tais* can be very long because of the nature of the production methods and because of the limited time that women have available for production. The time required to produce individual

tais is difficult to estimate as most producers cannot dedicate whole days exclusively to producing *tais*. All women producers have other daily responsibilities, and the time requirements for these tasks are usually factored into their estimates. For one male *tais* an average of one month is required compared to a small *selendang* that can be produced in a week. It can take from one week to a year to complete a *tais*, depending on the choice of fibre and the process time of spinning and dyeing, the size of the *tais*, as well as the importance or social relevance of the particular piece.

Where threads and dyes are produced traditionally, it takes approximately three months to turn raw cotton into hand-spun thread. Dyeing also takes some time. Women will spend a day collecting the plants for dye, and then two days to one week for the thread to go through the dye process.



In Balibo Maliana, women told the story that before the grandmothers' time there was a plentiful supply of cotton trees in the area. Great great grandmothers taught the grandmothers how to make thread and the technique for weaving tais. Grandmothers from other suco's know that tais originates from Suco Balibo.

Time and Cost of Production

	Mane	Feto	Selendang
Approximate time to complete	3 weeks to 4 months	3 weeks to 3 months	1 to 2 weeks
Average amount of thread required	80 skeins	60 skeins	40 skeins
Approximate cost of thread (cotton, pre-dyed)	US\$24	US\$18	US\$12
Approximate current selling price	US\$35	US\$25	US\$15

Raw Materials

Most *tais* currently available on the Dili market are produced using commercial pre-dyed thread imported from Indonesia. During the Indonesian period these threads became more popular and available. They are produced in 12 colours and can be purchased in Dili at *Comoro* and *Becora* markets as well as in various shops. The approximate cost for one small skein is US\$0.10 and for one large skein is US\$0.50. The small skeins can also be bought in packets of 10 or 100.

Most producer groups in the districts held similar opinions regarding choice of threads. Groups in Maliana, Los Palos, Baucau and Ainaro districts are still able to produce traditional cotton but use Indonesian threads. They consider the Indonesian threads to be less time consuming and believe that foreigners prefer the brighter colours.

Tais production groups in Oe-cusse currently have some cotton trees in their rice fields and are still spinning cotton for *tais* production. Most of the traditional cotton is used for producing *tais* for *adat* purposes as it makes a heavier cloth. The women reported that one of the reasons for still using hand-spun cotton is the lack of capital to purchase Indonesian threads.

Cottonseeds are still available for purchase in limited amounts in some districts such as Maliana, Ainaro, Oe-cusse and Viqueque. Cotton trees have an approximate productive life span of five years. From flower to cotton the time span is about one month.

Traditional plant dye knowledge does not appear to have been lost even though it is only rarely utilized in current *tais* production.

Up to eight colours can be made using traditional dye methods including:

- Yellow : using turmeric cooked into the thread
- Black : by soaking the thread in dark clay and mud (originally this was the water and mud from the buffalo pools, but was banned during Indonesian times due to health issues)
- White : the natural cotton washed and lightened in the sun
- Other colours such as green, blue, pink, red, violet, are achieved using particular plants, barks, leaves, berries and fruit rinds.

One group in Baucau expressed that they still know how to use traditional methods of dyeing, but do not consider the colour quality to be good enough. One production group in Oe-cusse is still using black, white, red and yellow traditional dyes. It is reported to take one day of walking to find the plants in the forest, another day to make the tint, and one to three days, sometimes up to a week to cook the dye into the cotton thread.

Other Materials - Silk

The NGO Loron Aban Hahu Ohin (LAHO) in Baucau District are a group producing *selendang tais* from locally produced silk. Silk worm eggs are imported from Indonesia and grown, hatched, fed and processed at LAHO's mulberry and silk farm. Silk has never been produced before in East Timor. Technical assistance has been provided to the project through Australian Volunteers International with funding support from Australian Agency for International Development (Ausaid).

Once the thread is produced, commercial dyes from Indonesia are used, and the thread is woven into *tais* using the manual backstrap weaving technique. Prices for the products are approximately the same as the cotton *tais* as the group have not yet worked out costings.

Only a limited amount of silk *tais* have been produced to date due to technical problems with the thread produced, and the small number of weavers. At present, these silk *tais* can only be purchased at the project site in Baucau as a marketing strategy is yet to be developed and demand for the product has not yet been assessed.

Times of Year for Production

Tais production is seasonal both in Dili and the districts. During the wet season humidity affects the durability of the threads and makes weaving difficult. Also during the wet season malaria and other illnesses are more prevalent. As women are the primary carers for children and the elderly, the responsibility of tending to the ill during this period reduces time available for weaving.

The wet season arrives at different times in different locations. There are significant variations between districts and even within districts. Respondents in Maliana District reported that the wet season lasts around four months beginning from November/December. The weavers here can begin producing again in May. For the producers in Suai, the wet season also begins around November/December, although some years they receive a second wet season from April to June. In Oe-cusse, respondents said the wet season arrives in October and lasts until April. In contrast, those in Los Palos reported one wet season only from April to July.

Agricultural activities such as planting and harvesting crops such as rice, coffee, corn and tobacco involve women. During these times, women are unable to produce *tais*.

Women interviewed report that they make *tais* when they can and try to build a stock which can be sold during the lean times.

Tais Production and Marketing Prior to the 1999 Ballot

Bartering systems existed in the Portuguese times, mainly in the context of *adat* ceremonies. A *tais* set consisting of *mane* and *feto tais* could be exchanged for livestock (such as cows and goats), a *belak* (a metal crescent-shaped chest ornament worn around the neck by men) and other exchangeable goods of worth.

In the past, the most common marketing system for district-based producers was the community market at the district and sub-district levels. In Bobonaro District women took their *tais* to the market every Saturday and sold to people who did not produce *tais*. In Bagia, Baucau District, *tais* were sold at the markets but only for *adat* ceremony purposes. *Grupú Ritabou* in Maliana reported that in Portuguese and Indonesian times when they sold *tais* in the market they would be taxed a small percentage by the market owner. Now, many *tais* are marketed through middlemen and sold to international personnel and their families resident in Dili.

In the suco's Uai-mua and Macasai, Baucau women remembered stories that during those times the number of stripes woven into a tais represented the number of cows expected in the exchange. An average adat tais set would receive around five or six cows in the agreed bride price. Similar stories were heard in Los Palos. This gives an indication of the higher value of tais within local communities due to their cultural association, i.e. one tais set = 5 to 6 cows.

Tais have a monetary and cultural value that is difficult to disassociate.

It appears that supply of imported goods such thread for producing *tais* were reasonably well established during Indonesian times. An export market for *tais* however, was never developed, with a large percentage of the *tais* purchased in East Timor by the Indonesian military. Prior to the violence that erupted at the time of the ballot in 1999, ongoing violence and terror was a major disruption for most East Timorese people. Fear of arrest and possible torture and death for themselves and family members was a reality for a large proportion of the population. This affected production as the general atmosphere of insecurity discouraged investment in production of *tais*.

With most families struggling under the economic and political conditions of the time, 'luxury items' such

as *tais* thread were not prioritised. Growing food, obtaining basic commodities (rice, cooking oil, kerosene etc.) and health problems were more pressing concerns.

During the post-ballot violence in September 1999, it has been estimated that 75 % of the population were displaced either to other countries or into the mountains or forests near their homes. Only basic necessities could be transported with them as most travel was done on foot. Only a few of the groups involved in the research reported that they managed to hide *tais* materials (*tais* pieces, looms etc) or were able to take them with them. Most returned to find their homes destroyed with little remaining. The majority of *tais* producers had all production equipment and materials stolen or destroyed.

Tais Production and Marketing During the Transitional Period (Oct 1999 to May 2002)

Since the emergency phase of 1999 and early 2000, there have been many funding opportunities such as Quick Impact Projects (QUIPs) and other small activity funding schemes that have been available to national NGOs to promote income generation projects. A small number of these projects have been aimed at promoting cultural industries such as *tais* and other craft production.

Initially, with the arrival of UNTAET and international aid organisations, products generated from these small projects had a market within the international community. However, it has become evident that many of the production groups are now experiencing difficulties retailing their produce as the number of international staff in East Timor has declined.

Personal Testimonies from Producers

Senora Lorensa Lela. "Buras tais", Taibessi, Dili

Lorensa is the co-ordinator of the group *Buras tais* in the area of *Tai-bessi* in Dili. The women involved in the production group came together because their families have lived in the same area for a few generations, and they know each other well.

Prior to the ballot of 1999 the group were producing *tais* with traditional materials. Some of the women took their materials with them when they fled Dili and were able to continue working when they returned. Others in the group returned to grow and sell

vegetables and opened a small kiosk because they did not have enough capital to re-invest in raw materials and equipment for production of *tais*. When they began making a small profit they were able to put the money together and purchase Indonesian threads collectively. Profits from the sale of *tais* assists the women to be able to send their children to school and buy food for their family.

Lorensa says that they are happy now because they are receiving a better price for their products than they were in Indonesian times. They still operate collectively, using profits to purchase more raw materials and pay a wage each weaver. Up to twenty *tais* are produced over a period of one or two months, and then the group attempts to market collectively. Their group is now independent, but they still need assistance with finding markets.

Senora Rosalia do Reis, Grupo Lases, Bekora, Dili

The group *Lases* returned to Dili as refugees after September 1999. Rosalia, the group’s coordinator, reported that when they first returned as refugees they needed to ‘look for their lives again’, so they sold vegetables and used the money to buy threads and make *tais* again. The group operates on a co-operative basis, purchasing threads collectively and then paying the workers. After selling the *tais* and purchasing more threads, one worker will receive US\$5 for a *mane* or *feto tais*, and US\$2 for a *selendang*.

Senora Lidia de Yesus, Grupo Garuda, Dili

Lidia’s group *Garuda*, has been developing *tais* fabric products such as cushion covers, table cloths and other items. Lydia says:

“They make tais because it is the culture of Timor. Before in Indonesian times the selling price was much cheaper, not good. When we came back from being refugees we sold soap powder to get enough money to make tais again. We have no other way to make money”

The women work as a team and receive about \$2.50 for one small *tais*, from the group coordinator.

Senora Maria Fatima Pinto, Fundasaun Hari Aumetan, Bekora, Dili

The *Fundasaun Hari Aumetan* is an independent group whose objective is to develop cultural resources of East Timor. The group has 25 women members who weave *tais* and sew embroidery. It is Maria’s opinion that:

“ We must develop the tais product and look for an avenue to open a good place for marketing. People in Timor have the capacity to weave tais and many other crafts, but who is going to buy them?”



Senora Lidia de Yesus

Donor Support for Tais Production

Within this research, various donor bodies and organizations were interviewed regarding their support to *tais* production groups. Reports regarding previous support and funding made available during the emergency phase have proved to be difficult to obtain. However the following donor organisations and NGOs assisted with providing general information on their previous and current programs, many of which supported *tais* producer groups.

Agency/Organisation	Previous/Current Support
AUSAID Direct funding	A number of projects have been supported since 2001, focusing on capacity building and training community groups and NGOs. Some of these projects included <i>tais</i> production activities.
ETCAS East Timor Community Assistance Scheme	2000/2001: Supported LAHO to establish and develop silk production and production of silk <i>tais</i> . Supported a women’s co-operative in Bobonaro for income generation including weaving and production of other handicrafts. 2001/2002: Continued support to LAHO silk project.
UN International Children’s Emergency Fund (UNICEF)	The women’s empowerment program run by UNICEF provides small grants to women’s organization some of which may produce <i>tais</i> . UNICEF however, has not specifically provided direct assistance to <i>tais</i> production groups.

Agency/Organisation	Previous/Current Support
UN High Commission for Refugees (UNHCR)	Provides support to women's groups, credit for small business, support to women focused NGOs such as Fokupers and ETWAVE. But has not directly granted financial assistance to <i>tais</i> production groups.
Canadian International Development agency (CIDA)	Has provided assistance to some <i>tais</i> production activities under a Dili based income generation program for women, implemented by <i>Yayasan Murak Rai</i> , a national NGO.
Oportunidade Timor Lorosa'e (OTL)	A Micro-Enterprise Development organization that commenced operations in Dili in April 2000 by conducting a 15-month pilot program. In January 2002, OTL launched its current program, which includes individual loans and group loans. It currently has 1000 clients. About 80% of loans are distributed to women. In the first half of 2002, OTL made loans to over 20 <i>tais</i> weavers through its group lending program (about 4% of its clients). Money is used to purchase raw materials for <i>tais</i> production. During the first loan, clients receive training on money management, business marketing, health, and democracy.
Concern Worldwide	Support such as threads and workspace facilities to a women's <i>tais</i> production group in Ainaro District.
Japanese NGO	One group in Ainaro has received financial assistance to set up a shop to produce and sell <i>tais</i> . This has provided the group with a market for products with the organization ordering and purchasing <i>tais</i> to export to Japan. The group has experienced quality control problems resulting in either only a cost price paid or <i>tais</i> remaining unsold.
The Alola Foundation	Provides assistance to women's organizations by providing them a link to donors and NGOs. Alola does not run its own projects but responds to the requests of women's groups who identify and request training such as program planning and proposal preparation workshops etc. In addition, Alola continues to document the personal stories of women ⁸ and acts as a conduit for supply of <i>tais</i> , funds and information between METHS and producers.
Timor Aid	Has a <i>tais</i> workshop that has been operating since December 1999. The workshop can take orders for specific designs and colours. The main <i>tais</i> workshop is located in Dili, and there are four smaller groups, one in Ainaro District and three in Suai District. Approximately 10 women work in each production group. Timor Aid has plans to do training in <i>tais</i> production in the future.
Asia Pacific Support Collective Timor Lorosae	Has provided assistance to a group in <i>Fatululik</i> , Suai, in the form of raw materials for production of <i>tais</i> as well as other crafts such as embroidery. In Ainaro, Oe-cusse and Ermera districts, they provide small business training and basic marketing to small women's groups with up to 185 women trained in each district. APSC.TL has also assisted groups to sell <i>tais</i> to the Peace Keeping Forces (PKF) in Suai District and has provided transport to send <i>tais</i> to Dili. APSC.TL aims to continue promoting and facilitating cultural activities. They have worked in co-ordination with IKFET on many activities and plan to have further involvement in the future.
Industry Kik Feto East Timor (IKFET)	Assists women's groups to establish sewing centers. They have also provided thread and other equipment to a <i>tais</i> production group at <i>Tasi Tolu</i> in Dili. <i>Tais</i> material is used to produce items such as bags and hats. IKFET has also assisted in trying to identify markets for the products. IKFET has now helped establish over 28 sewing centers as small, family businesses in seven districts and Dili. Items are produced for schools (such as uniforms) churches, and other social events such as weddings. IKFET has been funded independently by Ms. Elwyn Taylor an Australian volunteer, with donations of financial assistance and materials coming from all over Australia, including support from groups such as the Lions Club of Australia, Timor Appeal Committee in Sydney and the Deckchair Theatre Company in Fremantle, Western Australia.
Fokupers	Provides support and counseling to women who have suffered human rights abuses during the 1999 violence. They have assisted a group in Liquica District with a small grant to produce <i>tais</i> as a means of financial and emotional recovery.

Project Constraints and Issues Overlooked

Some of the positive results of many of the types of projects supported by donors include:

- The production of items for the domestic market.
- Familiarization of the groups involved with the process to apply for and receive funding.
- Provided experience for the groups involved in small business development.
- For many of the groups, the assistance has provided women with a focus and an opportunity to engage in an activity. During the emergency phase these activities have assisted many women to recover from the emotional trauma suffered prior to 1999 and to bring some type of normalcy to their day-to-day life.

Some negative aspects of such projects include:

- Poor accountability. Most grants require a level of financial accountability and reporting from the groups involved. However, little information is available from the donors and NGOs as to the organizational structure and financial management within these groups.
- Limited training and follow-up. Most of the projects have relied on the business sense of the individuals involved in the production groups and their success in marketing. Some groups have managed to continue producing and marketing products while others are still only at the production stage. In general, the projects have not assisted the producer groups to recover economically, and long-term success is difficult to see without further support.
- Little emphasis on marketing. Most small producer groups maintain a small, regular level of production dependent on availability of capital to purchase raw materials and availability of time to produce. Production levels were initially boosted by projects providing initial raw materials but appear to have leveled out due to limited demand for products. Marketing is the most pressing constraint for all producers, with limited domestic demand and a diminishing clientele of international buyers. This is an area that has been overlooked by most of the small grants programs.

In general, micro-credit schemes for income generation activities have provided a limited amount of training in business management and marketing. These groups appear to have had more success in the short term, but there are still major constraints facing all producer groups, including transport and marketing, business and organizational management skills, and limited domestic demand for these products.

Current Marketing

The economic situation within East Timor is still unstable. It has been estimated that 41% of households are living under the poverty line and as few as 22,000 people are formally employed⁹. Physical infrastructure is still lacking, and there is limited access to services and markets. Major constraints facing the *tais* industry include limited domestic demand for the products, the lack of an efficient transportation system, and the absence of a coordinating body to support both domestic and international marketing.

At present, most district *tais* producers sell their produce in bulk to the main marketing outlets such as the *tais* market and various shops in Dili. It is difficult to determine whether the producers themselves receive any profit in these transactions. Most producer groups did not appear to have a price structure for their *tais* products based on a cost/labor/profit equation. This reflects the general low level of business sense among *tais* producers.

Producer groups currently receive a basic and unreliable income from *tais* production. The economy



Stall at the Tais market in Dili

and demand for *tais* and other handicraft products that is generated from the international community in East Timor will diminish as scaling down of expatriate personnel continues. Unless alternative marketing options are identified, most producer groups will be unable to profitably continue their trade as at present.

Domestic Marketing

District Marketing

The majority of current buyers within East Timor are international personnel with a small number of Dili-based East Timorese purchasing *tais* for gifts and wedding ceremonies. District based producers sell mostly from their homes, due to limited transport and marketing options. Other marketing options within the districts are small kiosks and the Dili-based *tais* market stall owners who purchase *tais* in the districts and transport to Dili. In some districts, producer groups were able to sell *tais* to international staff in the district UNTAET offices.

Capital for transportation and other logistical issues is a major constraint for many district groups. Most producers operate collectively and arrange for a bus to take the *tais* to the market and then share the transport costs among the group. Transport costs vary depending on the district. The transport costs include a person to travel with the *tais* (US\$2.00-5.00/person) as well as an extra charge for the *tais* luggage.

The marketing strategy of most groups in Dili and the districts is to produce an average of 20 *tais* products and then approach either market sellers or shops. Most groups reported that they had a stock of approximately 5 to 20 pieces available for immediate sale.

During the last two years, some exhibitions have been held in Dili displaying and marketing *tais*, mainly to the international community. Some of the district and Dili based groups were able to take advantage of these expositions to market their products.

Tais Market, Dili

In Dili a permanent *tais* Market was established in 2001 with assistance from the UNTAET administration. Stalls were erected, and most stall owners also utilize them as their accommodation. During the research staff spoke to the following stall owners: Eugenia Martins, Rosa Monteiro, Lidia de Jesus, Piadade da Cruz, Manuel Gonsalves and Alfonso Monteiro.

Most of the stall owners indicated that they are happy with the arrangement of the new *tais* market because it is permanent and the stalls have good roofs enabling them to sell throughout the year. The *tais* market stalls hold large amount of stock. It is estimated that the stock levels could be up to 200 *tais* per stall, with at least 20 stalls on the complex.

Tais are bought from all districts, but most stall owners source products from the sub-district of *Atsabe* in Ermera District (*Atsabe* acts as a junction point between two districts: Bobonaro and Ermera).

Stall owners themselves or family members undertake periodic buying trips.

The majority of customers tend to be the international community, with East Timorese occasionally purchasing for *adat* purposes.

The market operates on a bargaining system. On average the stall owners estimate their weekly sales total US\$60. The mark-up average is from US\$3 to 10 per item, depending on the outcome of bargaining negotiations during sale.

Tais Shops, Dili

In mid 2002, a few shops that sell *tais* have opened in Dili. Most of these have been established privately and operate as businesses selling products at a 5% mark up from the purchase price paid to producers. Transportation costs are generally covered by the producers who bring their products into Dili to sell to shops and NGOs. Shops seem to stock smaller more select amounts of possibly up to 100 pieces.

QUIP Shop, Terezinha Belo

This shop was established in order to sell products resulting from Quick Impact Projects (QUIPS) funded in 2000-2001 by UNHCR, International Rescue Committee (IRC) and the UN Transitional Administration for East Timor (UNTAET). Independently established, the shop received some assistance from these donor organizations through their recommendation to producer groups to market through the shop. The producer sets the prices on the products and covers the cost of transport from the districts. The shop then adds 5% for profit. *Tais* and other products come from the districts of Ermera, Ainaro, Maliana, Oe-cusse and Suai. The shop sells approximately US\$80 worth of *tais* per week.

Souvenir Shop, Tropical Restaurant

Another independently established shop, the souvenir shop at the Tropical Restaurant, also buys directly from producers. Most of their products come from the districts of Oe-cusse, Ermera, Maliana and Ainaro. The shop sells a range of traditional *tais* as well as other products such as hats, bags, etc. This shop also takes 5% for profit and has extra overheads such as staff wages. Approximately US\$100 worth of *tais* is sold in one week.

Café Timor Shop

The Café Timor Shop is another independently established shop. It purchases *tais* products from Los Palos and Ermera districts. There is a 5% mark up, and the main customers tend to be members of the expatriate community. In one week the shop sells approximately US\$50 worth of *tais* products.

Street Sellers

A common sight in Dili are the *tais* street sellers carrying large bags of 10 to 20 *tais* products, either on the head, handlebars of a bicycle, or the front of a small cart. Street sellers mostly operate only in the dry season and travel to the districts to purchase their stock. Prices are negotiable based on the bargaining method. Street sellers estimate that they sell US\$50-70 worth of *tais* in one week.

The opinion among street sellers is that foreigners prefer to buy the brighter Indonesian thread *tais*, while Timorese prefer to purchase the natural coloured *tais*. This opinion is disputed by a number of foreigners who regularly purchased *tais*.



Weavers with painting

International Marketing

Within the scope of this study, only information regarding marketing in Australia has been researched. Some other international marketing has been occurring, such as the Japanese NGO purchasing stock in Ainaro, but information on activities in other countries has not been further researched.

Current Buyers and Distribution of Products in Australia

At present there are a number of ways in which *tais* products are distributed in Australia but as of yet, there has not been any significant mainstream retailing. The volume of *tais* products exported continues to be small and personalized. Marketing has been undertaken by individuals or groups with cultural or supportive relationships with the people of East Timor, mostly non-profit but some as commercial operations. Existing *tais* marketing initiatives in Australia include:

- Through the *tais* exhibition in Melbourne which has also been hosted in other cities.

- Through various municipal councils in the states of Victoria, New South Wales and Queensland.
- A number of individual retailers.

The exhibition entitled 'Weaving Women's Stories' is supported by the METHS group based in Melbourne and is linked with the Alola Foundation and the *Murak Rai* Foundation both based in Dili¹⁰. The primary objective of the exhibition is to introduce the Australian public to *tais* from East Timor, their cultural symbolism and the women who produce them (through the collection and display of personal testimonies). A selected sample of *tais* are displayed, and a small quantity made available for sale.

The main *tais* product sold are *selendangs* although orders can be made for other products. Other handicrafts have also been sold such as woven baskets which are considered easier to sell due to their size, functionality and relatively low price. The *tais* displayed and sold are all sourced in East Timor by individuals or through the *Murak Rai* and Alola Foundations.

The Alola Foundation also sells small quantities of *tais* through their office in Dili. Funds from the sale of these *tais* are forwarded to the individual weavers. Any profits that are generated are used to continue the project¹¹.

Over the last 12 months, the exhibition has opened in two states, Victoria and Queensland as well as the Australian Capital Territory. The exhibition is also planned to travel to the states of New South Wales and Western Australia and also to the Northern Territory¹².

From the observations of the co-ordinator of the *tais* exhibition, it was noted that most visitors to the exhibition are people from different aid organisations, people who are involved in East Timorese projects or issues, and people with an interest in arts and crafts. Current buyers are those with a higher than average disposable income, those who sympathised with the weavers through the stories accompanying the *tais* displayed, and those interested in arts and crafts. In addition, there were generally more female than male visitors to the exhibition.

Other non-profit sales of *tais* occur through a number of municipal councils in Brisbane, Sydney and Melbourne that have established friendship city relationships with towns in East Timor. These *tais* are also sourced through individuals, and on occasions, revenue is used to fund projects through the individual friendship city schemes.

In general, the market preference in Australia is for softer, natural colours that also incorporate some black. *Mane tais* are preferred to *feto tais* due to their larger size and utility (RMIT 2002).

Two persons involved in small-scale commercial marketing of *tais* in Australia provided information for this report. Both individuals have a personal affiliation with East Timor which extends beyond business.

One buyer based in Sydney¹³ sources products through individuals based in East Timor but also makes personal visits. *Tais* products are sold to shops and galleries, in exhibits (such as textile exhibits), at local fairs and any East Timor related events and occasionally to groups of women. *Tais* are marketed based on functionality (scarves, shawls, tablecloths, bedspreads, wall hangings etc depending on size) as well as cultural pieces (whole *tais*).

This buyer believes that there is potential for marketing *tais*, but it requires some investigation and active marketing incorporating some explanation and promotion of the product. Souvenir style *tais* products such as those including text messages woven into the piece do not sell well whereas products incorporating *tais* fabric such as handbags and carry bags sell well if the design is good. Potential use of *tais* fabric includes items such as T-shirts and other garments, cushion covers and other decorative uses (for example, 2 matching large *tais* could be used as curtains or for covering a sofa).

Another buyer based in Brisbane¹⁴ sources *tais* products and woven baskets from both West and East Timor. Personal buying trips are made and the products shipped through Kupang, West Timor. While *tais* do not require quarantine, all woven baskets must undergo quarantine treatment which adds AUD¹⁵ 1 to 2 to the retail price of each item. The general mark-up for items is around 300% of the buying price to cover transport and associated costs.

Tais and baskets are sold to a specialty shop in Sydney, a specialty market in Brisbane, a gallery in Central Australia and to private collectors. The volume of *tais* sold is small and highly dependent on the buyer. Each of the *tais* purchased from producers is documented (including photograph) by region, producer, motif and technique used. More than 1,050 *tais* have been documented in this way. Traditional natural colours sell well compared to the brighter colours using pre-dyed thread.

This buyer from Brisbane observes that the potential production and marketing for traditional *tais* is currently limited by several factors: the increasing use of synthetic materials for making *tais*, the loss of traditional and regionalised motifs and designs, and the limited market of buyers interested in the history of the product (its origin, cultural significance etc). Such buyers tend to be collectors. Although the potential market is limited, it can be expanded through focused marketing linked to projects designed to re-introduce or promote traditional designs and production methods.

Price Structures

There are no standardized pricing systems currently in use within the domestic market of East Timor. Prices paid are variable and largely dependent upon bargaining at the point of purchase. Furthermore there is also no pricing structure related to quality and no system of quality control in place.

Costs of traditional thread and dyes are difficult to determine. However, use of these requires greater time and skill compared to pre-dyed, industrially produced thread, and this factor should be reflected in the pricing structure.

The prices of *tais* are relatively more expensive than traditional cloths from other Asian countries (e.g., India, Vietnam, Thailand and Indonesia). This is partly due to inflation of prices for most goods and services as a result of the large international presence in the country as well as use of US dollars as the legal tender of the country. General prices for goods and services are expected to fall as the international presence decreases but use of US dollars as the legal tender is expected to continue indefinitely.

Distribution of Profits

Distribution of profits for *tais* sold has only been investigated for those *tais* exported to Australia through the METHS group. In general *tais* products and other handicrafts have been purchased directly from producers through people associated with METHS and sold at cost price with occasional mark-up to cover postage costs and other minor expenses.

However, there is generally little written evidence to verify that the individual producers have received their share of the money. Transparency and accountability with regard to the use of revenue generated by the sale of *tais* is an important issue and will require monitoring and the development of appropriate systems. How the revenue generated by producer groups is used is also an area that requires further investigation.

Transportation of Tais Products into Australia¹⁶

At present, the current distribution networks for *tais* and other handicrafts to Australia has been conducted through individual travelers. In general, *tais* have not undergone quarantine or incurred import taxes¹⁷. Woven baskets, however, have been quarantined, and treated incurring a AUD 30 fee per shipment¹⁸.

For future import of *tais* into Australia, a separate study has been conducted using a comparative unit of a carton of 15 large *tais* and 20 scarves and weighing 15-20kg¹⁹. The findings are summarised as follows.

Current Transport Options

Domestic Transportation

- Regular bus services between most regional capital towns and Dili. During the wet season some roads become impassable for uncertain lengths of time due to flood damage to roads and bridges, effects of landslides, etc.

Export Transportation Options

- The main shipping company operating between East Timor and Australia is Perkins shipping.
- There are customs brokers and forwarding agents such as Cross-Ocean forwarding.
- The only airline companies are Air North operating between Dili and Darwin and Merpati Nusantara Airlines operating between Dili and Denpasar.
- International postal services are available in Dili but are considered to be unreliable.

Least Expensive Transport Options

The following recommendations are from the RMIT report and have been based on the least expensive options for exporting *tais* from Dili and import taxes and duties into Australia at the time that report was written.

- 1-5 cartons: TNT Express
- 5-30 cartons: TNT Express
- 30 cartons and above: Perkins shipping

Import Documentation, Taxes and Tariffs

Customs

Importing into Australia requires the following minimum documentation for customs clearance:

- A completed customs entry
- A Bill of Lading or Consignment Note
- An invoice
- A Tariff Concession Number as applicable

The Australian Customs Services (ACS) requires that the invoice should contain the following details:

- Name and address of the seller of the goods
- Name and address of the buyer of the goods
- Complete description of the goods
- Country of origin of the goods
- Selling price of the goods to the buyer of the goods

Customs Clearance

Commercial customs clearances may be arranged by the owner or a customs broker who will usually charge a fee for the service. ACS recommends that a customs broker conducts the customs clearance as it is a complex process and any mistake may result in a heavy financial penalties. All options for transporting and importing goods into Australia

(except with the local post office) require that a customs clearance fee be paid.

Valuation for Customs Purposes

The most common method for the valuation of goods is to use the price actually paid for the imported goods. However, for this method to apply there must not be any corporate or personal relationship between the buyer and the seller which may have affected the price paid. The freight and insurance costs between East Timor and Australia would be excluded from the customs value of the shipment.

Goods and Services Tax (GST)

GST applies to the shipment of *tais* from East Timor, based on the stock value of the shipment. This tax is currently set at 10%. This cost must be added to the retail price for *tais* products sold in Australia. The value of the shipment is the sum of:

- The customs value of the imported goods
- Any duties payable (if applicable)
- The amount paid or payable to transport the goods to Australia and to insure the goods for that transport

Duties and Tariffs

Under the Australian Customs By-laws 9840020 it would be possible to import *tais* products into Australia duty free. To qualify for this concession, the manufacturer or supplier of the goods, through the importer, will be required to prove to the ACS that the items are "handmade". For the purpose of the concession, the term 'handmade' means that:

- the fabric is made by one or more of the following processes:
 - by hand
 - by non-mechanical, non-powered tools held in the hand; or
 - produced on hand or foot powered looms
- the good is made by one or more of the following processes:
 - by hand
 - by non-mechanical, non-powered tools held in the hand; or
 - where the concession specifically allows, by machines powered by foot or hand; and
- is wholly, or mainly (by weight) comprised of materials traditionally used in the production of handicrafts; and
- has attained, by reason of being 'handmade', an artistic or decorative character generally comparable with traditional 'handmade' products of the country in which the goods were made.

These handicraft concessions are valid for 5 years on a renewal basis. To apply for a handicraft concession, evidence, such as video or photographic footage of the production process and the item to be imported, must be sent to the Regional Director of the ACS in the Australian State to which the good will be imported.

Quarantine

The Australian Quarantine & Inspection Services (AQIS) has recommended that “as the cloths have been processed (in this case spun) into a garment or fabric they would not be of quarantine concern”.

Government of East Timor Comment²⁰

The government does not at present have a formal policy position; however, there is a strong need to protect the traditional *tais* weaving industry. The growing prevalence of ‘*tais* without integrity’ being imported from Indonesia is of concern. For this reason, the government will at least be looking at the following measures:

1. The protection of exportation and sale of *tais* which are not traditional Timorese *tais* by way of authenticity certification legislation.
2. The reservation for nationals only to be able to participate in the activity of *tais* weaving and production.
3. Assist those involved in cultural promotion and production of authentic *tais* in order to enhance their efficacy and credibility by administrative and legal support mechanisms.
4. Promote those *tais* with ‘integrity’ in implementing government trade policy (such as during trade shows, expos, in embassies etc) in contrast to those without it.
5. Explore legislation to protect the intellectual property rights or at least the work of the weavers as a means of empowering them with a technical skill and therefore economic value for their work.



Woman weaving

Future of the Domestic Market

The current domestic demand for *tais* products is limited and will further decline as international agencies scale down operations. The majority of the local population do not have sufficient disposable income to support a domestic market. *Tais* products purchased by East Timorese people are usually for the purpose of weddings, as opposed to the international purchase for souvenir purposes.

Tourists can potentially provide increased demand to support the domestic market, but at present this industry is in the very early stages of development, and it remains to be seen how this industry will develop

in the near future. The tourism industry faces strong competition for the ‘tourist dollar’ within the Asian area especially from Indonesia where prices are lower and infrastructure better developed. However East Timor also enjoys a strong international profile especially in Australia. Capitalising on this profile will be a crucial future strategy.

Future of the International Market

East Timor’s *tais* industry faces strong competition in the international market from other countries such as Indonesia, Vietnam, Thailand and India, where similar textiles are exported at much lower prices (RMIT 2002).

The current use of US dollars as the legal tender of East Timor ensures that this price disadvantage will remain for the foreseeable future. It is therefore important to develop marketing strategies emphasizing the ‘uniqueness’ and cultural value of *tais* and capitalizing on East Timor’s strong international profile.

There appears to be two main distinct marketing opportunities in Australia. Each will require its own specific marketing strategies, training activities, and pricing structures:

- *Authentic, traditional pieces utilizing natural cottons and dyes* : This will be a more exclusive ‘collectors’ market as this production method is especially time consuming and laborious and will therefore be more expensive.
- *Pieces utilizing commercial pre-dyed thread adapted to suit current market demand*: This ‘functional’ market will be based on research into market demand and priced to compete with other handicraft products from other producer countries.

Further exploration of these markets will require professional analysis. International marketing opportunities will also be reliant upon the development of the infrastructure and regulatory mechanisms within East Timor, especially improved transportation and the establishment of a marketing body that will coordinate supply, regulate the industry with respect to certification of authenticity, and maintain quality control.

Planning for any development of the *tais* industry also requires an emphasis on training in quality control and product development.

Analysis²¹

Commercialization of *tais* as a traded commodity has only occurred in the previous 25 years during Indonesian occupation. Today it is one of the predominant cash income generation activities for women and has expanded into non-traditional *tais* products developed for the modern market. This process since the end of 1999 has been driven by a number of projects supported by the international community focusing on income generation for women.

The impact of these projects on the livelihoods of the women involved has yet to be analysed, and it remains unclear how much *tais* production actually contributes to the incomes of these families relative to other potential livelihood activities. However, it is clear from this study that the women currently involved in *tais* production consider *tais* production as an important cultural as well as livelihood activity which cannot necessarily be measured in dollar terms.

Production of *tais* historically and currently is dominated by women who represent the major skill-base. Producers have generally become organized into production groups which are based both in urban and rural areas.

The current domestic market relies on tourists, international staff of organizations working in East Timor and a small section of the East Timorese community that can afford to purchase *tais* products.

At present the main export market for *tais* products is Australia although potential may exist in other countries where there are existing handicraft markets and sufficient buying power.

Production of *tais* represents a potential industry based upon an existing skill-base and, at this stage, demand (domestic and export) that can also help promote economic empowerment of women. However, for this potential to be realised further analysis is required, particularly with regard to sustainable markets and production strategies.

International marketing of *tais* (based on the current experience in Australia) will require strategies focusing on two distinct markets; a 'collectors' market for products featuring traditional designs and production methods, and a 'functional' market of various products incorporating *tais* fabric. Maintaining a balance in development of the industry is essential to not only

match production to demand but also to ensure that the 'functional' market does not compete with the 'collector' market. *Tais* have a strong cultural and social significance within East Timorese communities. Traditional methods in production are considered to be currently under threat through the increasing use of imported pre-dyed thread and to a lesser extent the increasing production of *tais* fabric for consumer markets.

The development of a 'collector's' market targeting traditional methods of production and motifs creates the opportunity to maintain or revitalize the cultural integrity of *tais* production whereas a 'functional' market provides an income generation option for producers no longer able or willing to employ traditional methods and designs. The 'collectors' market, in particular, will require the development of systems to protect the authenticity of *tais* produced. Both markets will require marketing strategies capitalising on East Timor's profile while maintaining their status as a 'hand made' product exempt from import duties.

However, there are currently significant constraints to the development of the *tais* industry. These include the following:

- *Tais* producer groups currently supported by projects rely heavily on the subsidization of costs such as raw materials and transportation, which is not sustainable in the long-term.
- The flow of benefits to producer groups and their members is not well documented and requires further investigation. Improved monitoring systems are required to promote transparency and accountability.
- The selling price of *tais* products within East Timor and in Australia is relatively high compared to similar textiles produced in other countries. This reflects both the high cost of raw materials and transport (domestic and international) and the use of the US dollar as the legal tender of East Timor.
- Current production levels are low and of variable quality, and there is no current pricing or quality control system. Transport costs per unit are therefore high as shipments tend to be small and there is no guarantee of quality.
- There is currently no industry support organization to coordinate the supply of materials, coordinate production, facilitate export and promote the marketing of *tais* products.



Marta Soares weaving

The current export system to Australia is heavily dependent on individuals with personal affiliations with East Timor or who currently work in East Timor. These individuals are involved in sourcing of product, transport, maintaining communication with buyers and producers and handling of payments. In addition the current market in Australia appears to be highly dependent on buyers with an interest in East Timor, members of solidarity groups, staff of aid organisations or persons interested in particular arts and crafts.

Further analysis is required to assess whether a viable commercial export market exists in Australia (as well as other destinations such as the USA or Europe) especially with respect to mainstream retail shops (for *tais* products or items using *tais* fabric) or the more specialised art and collectors markets such as museum gallery shops or antique/collector shops. This analysis would include:

- An analysis of the potential market (buyer profile, type of products in demand, estimated volume of demand etc) and survey of potential outlets.
- An analysis of costs for each category of product (based on an analysis of product costing carried out at the producer level-see below) .

Other significant and interrelated marketing issues within East Timor must also be further investigated. These include:

- The capacity of women to produce *tais* given the limited time they have to dedicate to production. This would include an analysis of opportunity cost of time used for production versus other livelihood activities on a seasonal basis.
- Analysis of product costing. It is unclear how the price of each piece is derived and what represents a 'fair' and sustainable pricing structure. That is, a pricing structure representing an acceptable income for producers as well as a wide enough market to ensure ongoing/repeat orders for product. This analysis should provide a Free on Board (FOB) estimate for each category of product. This includes all costs at point of origin (production, packaging, domestic transport, etc) excluding actual shipping costs.
- Analysis of sustainable production levels (including reliability of supply) for different kinds of *tais* products.
- Availability of raw materials. This would include domestic availability of natural dyes and cotton as well as availability of imported materials. This analysis would be linked to the above analysis of product costing.
- Potential for a marketing body in East Timor to:
 - Assist with certification of *tais* products
 - Assist with promotion and marketing of *tais* products

- Ensure production of *tais* products is linked to potential markets
 - Facilitate linkages between buyers and producers
 - Facilitate supply of raw materials to producers and *tais* products to buyers
 - Coordinate support to producers such as technical assistance (product design, business management training etc), access to credit, access to market information etc.
 - Assist buyers (information on what products are available and at what prices etc)
- Analysis of transport costs. This would involve domestic and international transport options and costs to a range of production centers within East Timor and from East Timor to a range of potential export destinations.



Woman weaving

Recommendations by Producer Groups

The following recommendations are based on ideas and needs expressed by producer groups, both in Dili and the districts, and demonstrate their understanding of the current situation, and their aspirations regarding development of the industry and their livelihoods.

Training

The primary training need for many producer groups is basic literacy, numeracy and organizational development. Without this, all other skill and business training will be largely ineffective. Some groups in

outlying districts who speak their traditional language also requested training in Tetum (one of the national languages of East Timor²²) and English, in order to be able to collaborate with other groups and businesses.

Basic business skills are required by most producer groups in order to improve understanding on:

- How to work out a realistic and sustainable price structures based on cost of materials and an acceptable return for their effort.
- How to manage their own finances and to engage in business transactions with domestic and international markets.

This would also provide an avenue to promote transparency, self-sufficiency and protection from exploitation.

Many producer groups and small NGOs have requested proposal writing and basic project management training. This would assist groups to access initial capital for production from donors or agencies providing credit. Training in quality control and product development was also frequently requested by most producers in order to diversify their product range and compete in international markets. International experience in marketing handicrafts has shown that products need to be designed for markets rather than finding markets for existing products.

Collaboration and skill sharing between producer groups who use traditionally produced threads and dyes and those who do not will provide an opportunity for more groups to produce authentic, traditional *tais* which will help maintain the cultural integrity of *tais* production and also preserve and promote these traditional skills.

Recommendations to Government

Requests came from many producer groups for government assistance and support. Most groups identified the need for legislation to protect and preserve *tais* as a cultural industry. This will require the establishment of criteria for certification as a traditional East Timorese cultural product. In addition, the current district-specific designs and motifs require a mechanism for protecting their heritage and intellectual property rights. These regulatory measures are a primary requirement before further development of an export industry.

Other government support to the *tais* industry could include promotion of *tais* within the domestic market through encouraging schools and businesses to incorporate *tais* into uniforms, for use in decorating public buildings etc. During Indonesian times a custom was established of having a regular day that *tais* is worn in public. A number of producer groups have

requested that this be reinstated in order to revitalize the industry. Promotion could be undertaken using television and radio.

Production of traditional cotton and plant dyes also merit further investigation. Traditional cottonseeds and trees are limited in some districts, and plants for dyes are no longer used in some districts due to the lack of availability. Further documentation of traditional methods and development of regular supply of these materials is needed to support production of authentic and traditional *tais*. Producer groups also requested that the government provide assistance for traditional cotton production and also monitor or regulate the quantity and price of imported Indonesian thread.

Producer groups also recommended that the government assist in standardizing prices for *tais* products. However this does not necessarily mean that producers will be willing to receive lower prices than they currently receive. Prices should reflect the cost of raw materials and must be based on quality and authenticity of the production method.

Finally, government regulation of the *tais* industry must also ensure that exploitative conditions as witnessed in traditional craft business enterprises in other countries is prevented. Protective regulation must be enacted before further expansion of the *tais* industry.

Strategies to Support Women's Groups Producing Traditional Crafts

For national and international NGOs, agencies and businesses that are considering implementing projects related to the *tais* industry, certain issues need to be taken into consideration.

- At the producer level, groups require and have requested training in business management, organizational/cooperative development, product development and a system of costing and quality control. Targeting support at this level will improve the level of self-sufficiency and empowerment of these producer groups.
- Time constraints on production need to be taken into account when considering the production levels and supply. These time constraints are a genuine and an inevitable reality for women given their situation of multiple responsibilities within the family and community which can also vary seasonally.
- Planning for projects requires methodical consultation, collaboration and planning with the producer groups and other individuals involved in all levels of supply, management and marketing. The level of commitment to promoting ownership of the project will have a strong influence on sustainability.

- Organizational development emphasizing transparency, accountability and sustainability must be emphasized and demonstrated by organizations and businesses during project implementation. For example, distribution and use of income resulting from sales in Australia have been difficult to trace. Benefit flow to producers needs to be ensured.
- The promotion of fair trade criteria is a useful starting point, emphasizing fair prices that support the livelihoods of producer groups, participation of producers in decision making, advanced purchasing, development of relationships between buyers and producers etc.
- Linking of producer groups to ongoing professional support such as through the International Federation of Alternative Trade (IFAT). IFAT is the main international body for fair trade in the Asia region. IFAT is a network which can support better access to fair trade buyers and markets, information on markets and design and professional technical assistance.

Follow-up Strategies

Strategies for developing production and marketing both domestically and internationally will require further collaboration and planning with major stakeholders, as well as further in-depth research especially regarding potential export markets, in particular mainstream retail and collectors markets in Australia. This research will require professional handicraft marketing expertise.

The major areas needing immediate assistance within East Timor are training in business management and skills training. Engaging local NGOs who are already providing these areas of training would be the first step towards capacity building producer groups. Developing and extending networks between producer groups and regional networks for purposes of skill sharing and collaboration would provide groups with support, expand knowledge and provide opportunities for resource sharing. Training regarding quality and product development could be resourced from those countries that already have a wealth of knowledge and experience in this area, such as Thailand, Indonesia and Malaysia.

These recommendations have been discussed among Dili based producer groups, domestic marketing bodies, national NGOs, and government representatives during a one-day workshop. Participants were vocal and enthusiastic about identifying ways that these recommendations could be instigated in the interim, such as networking and approaching other organizations that could provide assistance and support.

Notes

¹ Ms. Melanie Stevens.

² Jean-Pierre Masclef and Kosintr Puongsophol, "Market Review for Existing Network for *Tais* and Recommendations", RMIT 2002.

³ This overall goal relates to a long-term program of which this Marketing Overview is the first phase.

⁴ "State of the Nation Report", Planning Commission, April, 2002.

⁵ "East Timor Human Development Report 2002, Ukun Rasik A'an East Timor – the way ahead", United Nations Development Programme, 2002.

⁶ Women have been closely involved in the East Timor resistance movement during the Indonesian occupation (1975 until 1999). Organisations such as OPMT (OPMT was founded in Dili in 1975 by Rosa 'Muki' Bonaparte Soares and later divided into two factions, the other becoming OMT) have contributed a great deal to the newly independent nation of East Timor.

⁷ Mr. Jose Texeira, currently Secretary of State for Tourism, Environment and Investment was, during the transitional period (which ended on 20 May 2002), the Head of the Trade and investment Unit.

⁸ Weaving Women's Stories. The first three stories were exhibited along with *tais* produced by these women at the Melbourne International Arts Festival in October 2001.

⁹ "East Timor Human Development Report 2002, Ukun Rasik A'an East Timor – the way ahead", United Nations Development Programme, 2002.

¹⁰ Information on the exhibition is based on comments from Ms. Sarah Niner, curator of the 'Weaving Women's Stories' exhibition.

¹¹ The project identifies weavers of 'excellence' from which three *tais* will be ordered, one for exhibition and two for sale on consignment. Each *tais* will have attached the weaver's name, photo and booklet recounting her personal story of struggle. The project will therefore generate income for these women as well as increase public understanding and acknowledgement of the experience of East Timorese women.

¹² Personal comments Ms. Helen Hendry, Exhibition booking officer.

¹³ Ms. Alix Mandelson.

¹⁴ Ms. Julie Emery.

¹⁵ At the time of writing AUD 1.00 was approximately USD 0.55.

¹⁶ Jean-Pierre Masclef and Kosintr Puongsophol, "Market Review for Existing Network for *Tais* and Recommendations", RMIT 2002.

¹⁷ Due to the small quantities imported by each person.

¹⁸ Personal comments, Ms. Sarah Niner.

¹⁹ Jean-Pierre Masclef and Kosintr Puongsophol, "Market Review for Existing Network for *Tais* and Recommendations", RMIT 2002.

²⁰ Mr. Jose Teixeira, Secretary of State, Tourism, Environment and Investment, Ministry of Development and the Environment, E-mail correspondence, August 2002.

²¹ This analysis is supported by extensive comments provided by Dr. Linda Chalmers, Oxfam Australia Trading, and also from comments provided by Ms. Julie Emery.

²² East Timor has two national languages, Portuguese and Tetum.

This is the mythological story kindly shared with us by the women of Los Palos, Suco Lore 1, Aldeia Chai. This story comes from the grandmothers who told about the time before they had the knowledge of *tais*.

In the time before, there was a king who lived in East Timor who had two wives. The first wife's name was Manu, the second's wife's name Romo loi lawan. Romo loi lawan was pregnant with her first child.

One day the king had to go to a faraway land. Before he went, he took two pieces of thread and he ordered his second wife that while he is away the two wives must tie thread and through this method make cloth, "When I return back I want to have the cloth prepared and presented to me".

After the King had left, the wives began to attempt to make tais, but the second wife did not know how to make cloth and found it even more difficult as she was pregnant. She started crying, and fretting that on the King's return she would not have finished the cloth.

While she was crying a mouse appeared and asked her "why are you crying?" She replied to the mouse, "I am crying because I don't know how to make cloth and also I am pregnant and this makes it more difficult". The mouse said to her, "you have no need to cry, this evening just put the threads in the big cooking pot, cook the threads, then I will make the cloth".

Until the evening Romo loi lawan cooked dinner and then the mouse came and ate well. After dinner he began to gather threads, then they put it in a clay pot, and put it on to cook. In the morning when Romo loi lawan opened the pot she pulled out a beautiful piece of woven cloth that came to be known as tais.