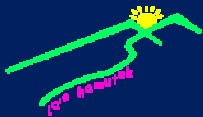


Sustentabilidade Fiskál ba Timor-Leste

husi Charles Scheiner
La'o Hamutuk
11 Juñu 2014



Estatístika báziku

- Liu 50% povu moris iha liña pobreza nia okos.
- 80% povu hela iha area rurais, moris ho agrikultura subsistensia.
- Liu 1,200 labarik ho idade menus tinan lima mate kada tinan husi kondisaun bele prevene ... maizumenus dala 20 ema na'in hira mate husi violénsia física.
- Labarik barak liu mate husi diarreha duke malaria.

Estatístika báziku

Molok tinan 2021, 250,000
labarik tan sei moris, no kampu
mina no gas hotu ona.

Oinsá sira bele moris?

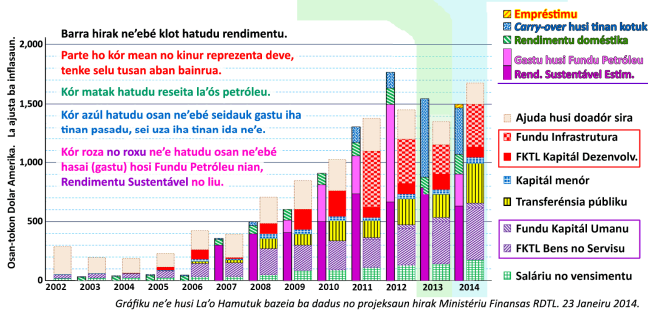
Dependénsia Petróleu

- Projeta ba Reseita estado iha 2014:..... token \$2,380
token \$2,213 (93%) sei mai hosi mina-rai
(inkl. token \$770 hosi retornu investimentu)
token \$ 166 (7%) hosi rekursu naun petróleu
- OJE 2014..... token \$1,500
token \$903 (60%) hosi Fundu Petrólíferu iha 2014.
token \$430 (29%) tan hosi FP ohin no futuro. (Rollover no tusan)
- PIB/GDP naun petrólíferu iha 2011:..... token \$1,047
GDP petrólíferu iha 2011:..... token \$3,478
Produtivu (agrikultura & fabrika) token \$179 (4%) no hatún
- Balansu komérsiu (2013): token \$694 ba importasaun,
token \$18 ba esportasaun (98% café).
- Reseita husi petróleu ba estado, la'ós ba povu.

Sudan Súl, Libia (no Guinea Ekuatorial?) iha nasaun rua de'it iha mundu depende liu Timor-Leste ba esportasaun mina no gas.

Panorama: Montante OJE sa'e maka'as

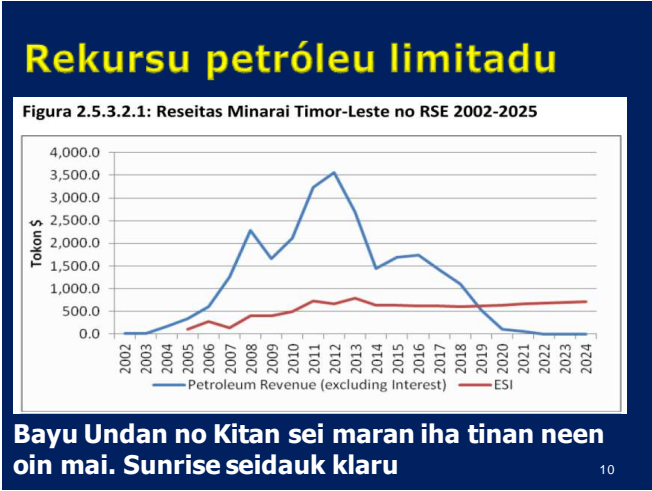
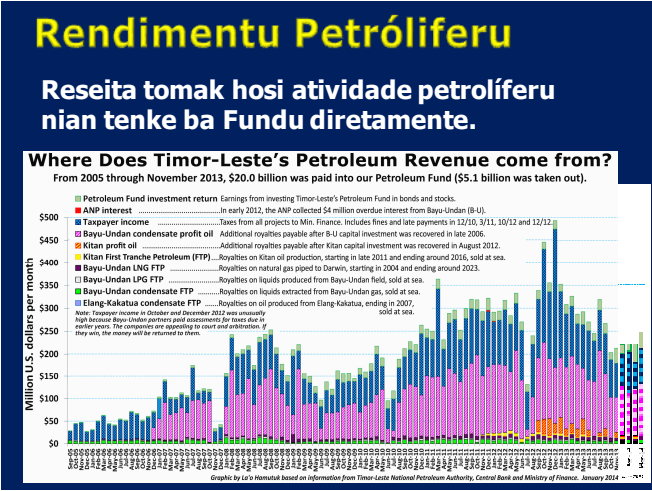
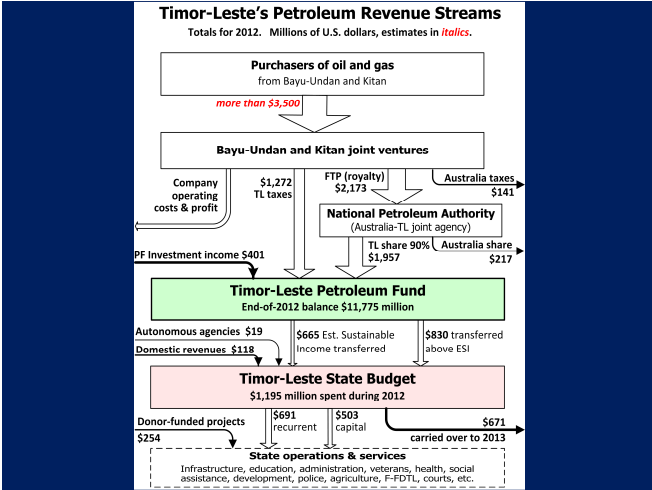
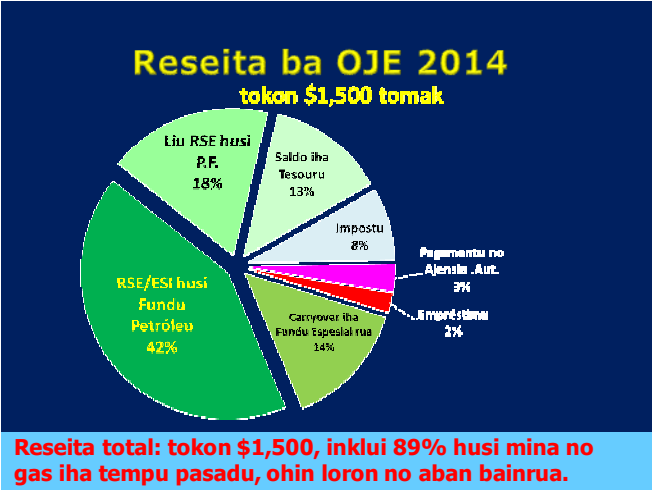
Gastu no Reseita Estado nian durante ne'e (inklui ajénsia auton.)
Ezekusaun 2002-2012 2013 Est. Ezek. 2014 promulgadu

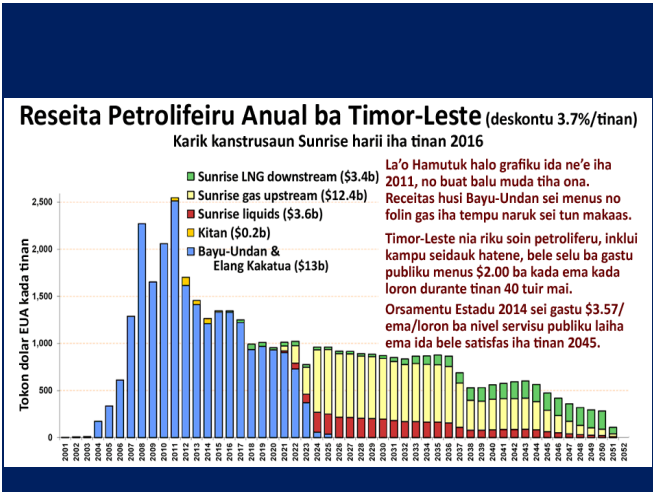


OJE 2014 seidauk fó prioridade ba edukasaun, agrikultura no saúde.

Proposta Orsamentu Estado 2014 (\$1,500 token dolar EUA)







Modelu ida ne'e

- Halo projesaun ba reseita no gastu estadu nian, bazeia ba kontestu atuál, fatór esterna no dezizaun iha futuru.
- La koko estimatiza makro-ekonomia: laiha PIB/GDP, inflasaun, pobreza ka balansu komérsiu ... ka ligasaun fraku sira.

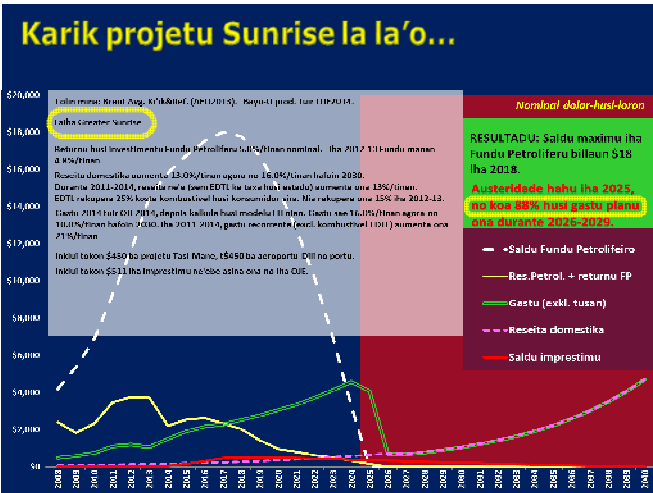
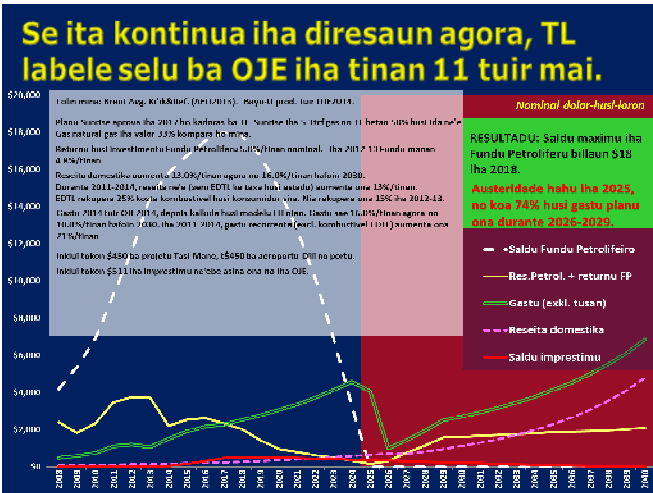
Rezultadu

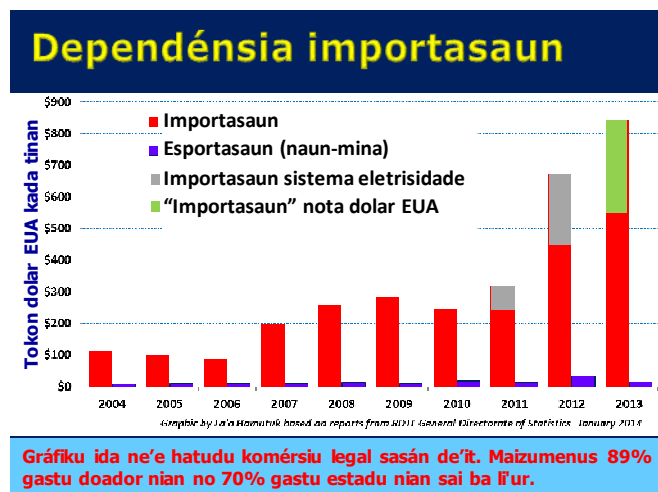
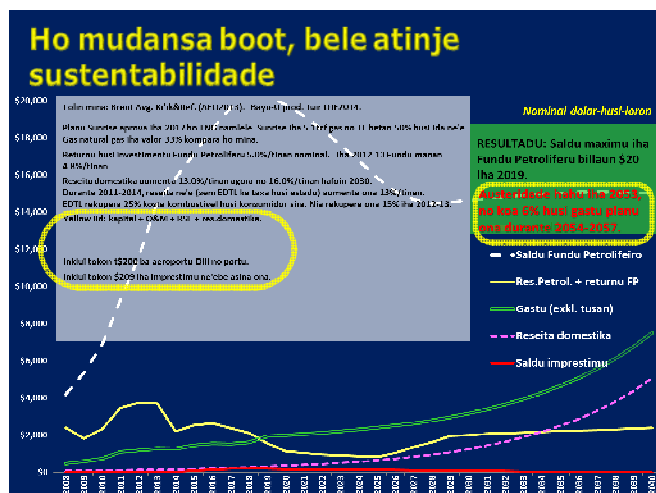
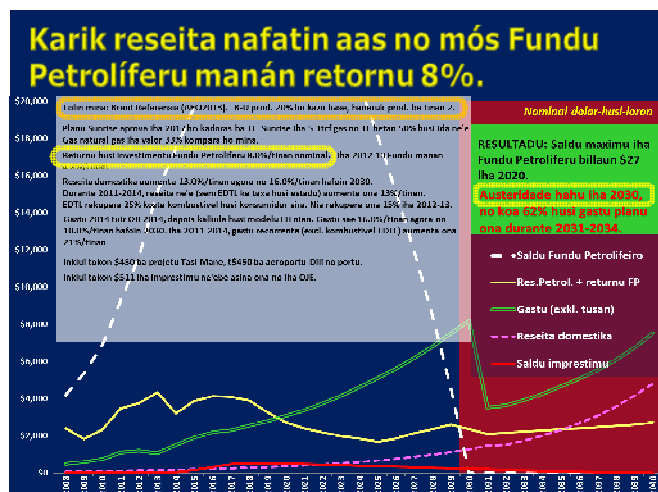
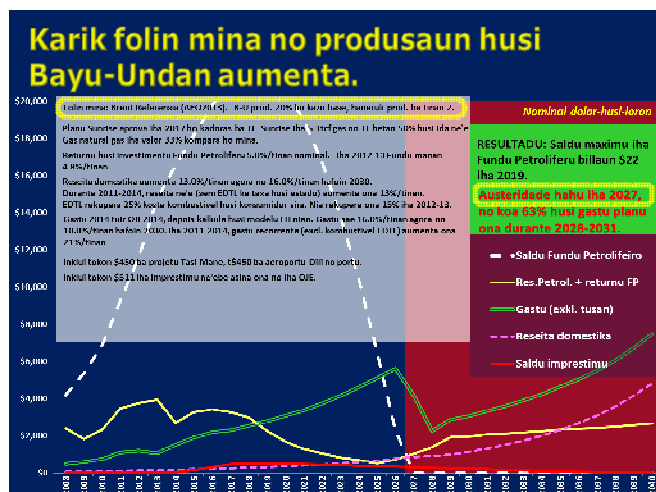
- Reseita no gastu kada tinan
- Saldu iha Fundu Petrolíferu
- Saldu seidauk selu fali husi deve
- Gráfika sira la hatudu:
 - Rendimentu Sustentavel Estimadu
 - Kompozisaun despeza: rekurrente, tusan, manutensaun, kapitál menór no dezenvolvimentu
 - Kompozisaun reseita: EDTL, emprestimu, taxa doméstika, mina no gas, retorno investimentu husi Fundu Petrolíferu

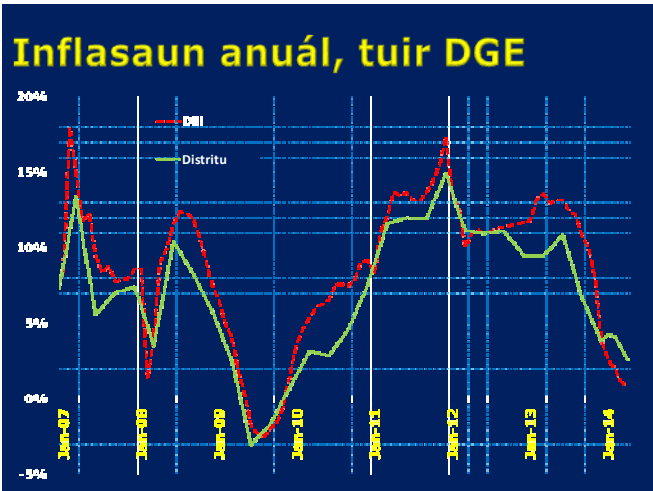
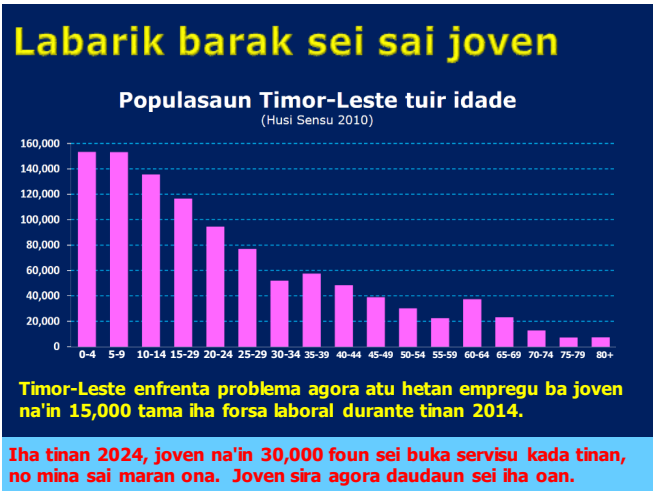
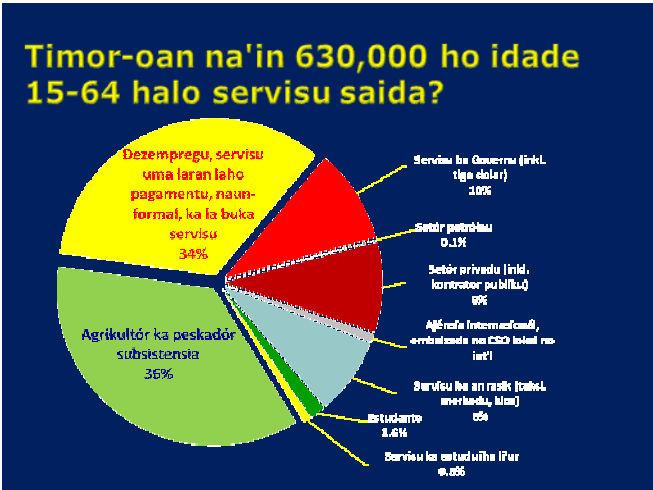
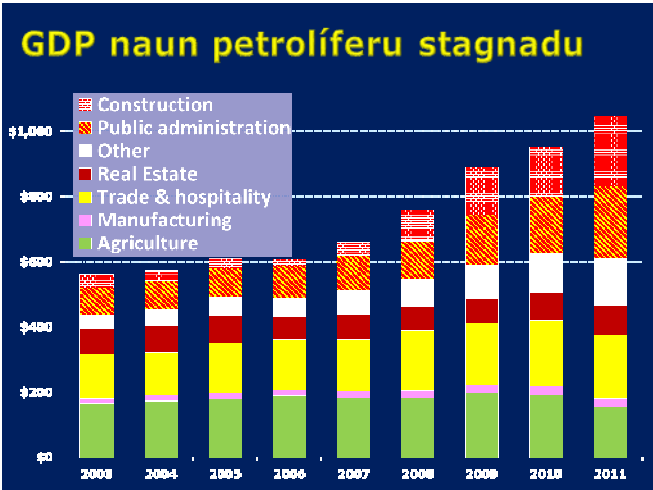
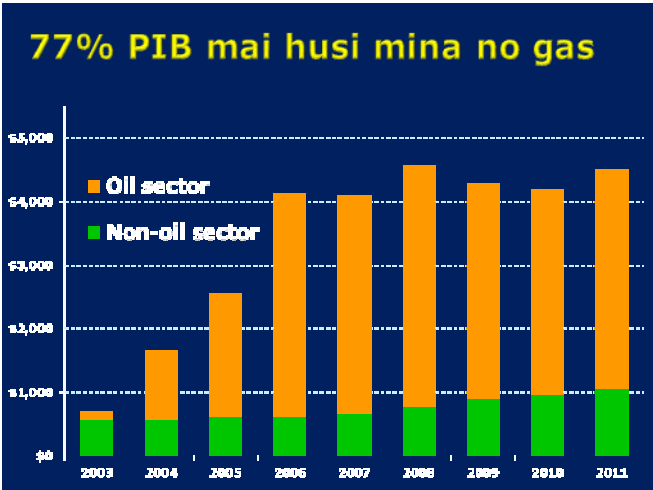
Asumsaun bele koko

- Inflasaun global, populasaun, TL
- Folin mina no gas
- Produsaun bele hetan husi Bayu-Undan no Sunrise
- Dezenvolvimentu Greater Sunrise: karik, bainhira, iha ne'ébé no fahe reseita
- Returno husi investimentu Fundu Petrolíferu
- Reseita doméstika, inklui rekuperasaun gastu EDTL ba kombustivel
- Despeza recurrente, inklui manutensaun infraestrutura kapitál
- Despeza kapitál: PPP no Tasi Mane
- Emprestimu
- "Yellow Road" no senáriu sustentavel seluk

Brent Crude Oil Futures Close (Front Month)





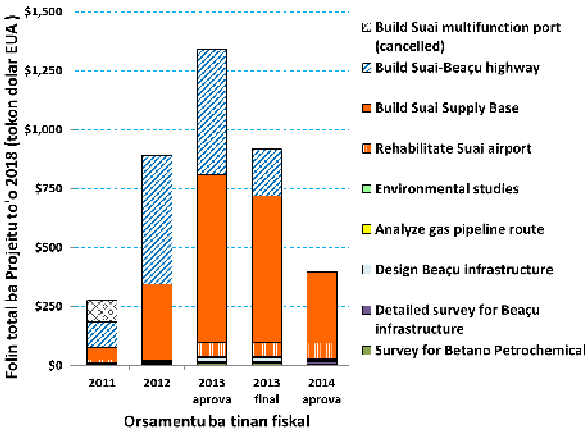


Projetu infrastrutura Petr6leu Tasi Mane

- TL hahu servisu ba korred6r petr6leu Tasi Mane iha 2010.
- Durante 2011-2013, TL gastu ona tokon \$35.
- Folin projektu tomak bele liu billaun \$2 (liu karik Timor-Leste selu ba refinaria, kadoras, ka planta LNG).
- OJE 2014 sei gastu t\$46 iha 2014 no t\$320m iha 2015-2018, maib6 lakon buat barak.



Projetu Tasi Mane tomak folin hira?



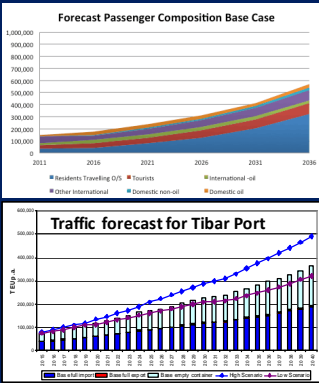
Konsekuensia hosi TMP:

- TMP Halo TL depende liu tan ba set6r petroliferu.
- Kusta boot liu fali retorno.
- Haluha set6r sustentavel (agrikultura, turizmu, ind6stria ki'ik nsst).
- Besik osan tomak gasta ba kompa'nia estranjeiru, fornese kampu servisu uitoan de'it.
- Sei kria problema sosi6l, hadau rai, eviksaun, implikasaun ba saude no degrada no amesa ba ambiente.

Karik Sunrise la dada mai iha TL?
Projetu ne'e atu ba saida tan?

Harii portu no aeroportu boot liu

- IFC f6 korajen ba TL atu harii portu no aeroportu boot liu duke trafiku bele justifika.
- Oins6 Timor-Leste bele selu ba defisit komersiu bainhira mina no gas maran ona?



PPP

Portu Tibar

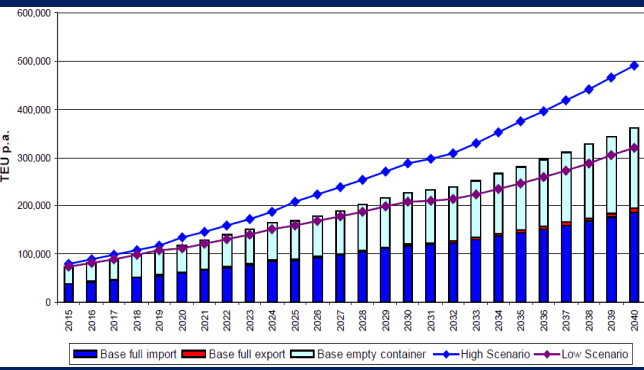
- Parte hosi projektu Parseriedade P6bliku-Privadu
- IFC (Grupe Banku Mundial) tau matan ba ida ne'e
- IFC projektu katak Timor-Leste sei importa sas6n maka'as
- Est. kapital investimentu tokon \$300-400



Portu Tibar Hosi Fundu Infrastrutura iha OJE 2014

Gasta 2012	2013	2014	2015	2016	2017	Hafoin 2017
0.7	1.5	3.5	20.4	109.5	9.9+	liu

Sen6riu IFC nian ba importasaun

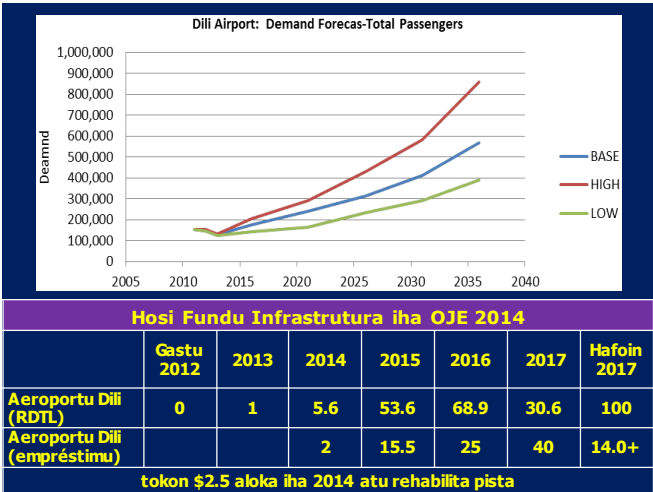


Aeroporto Dili

- Parte hosi PPP ne'ebé IFC mak tau matan, ka husi governu Malázia
- Ekspeta bele fasilita ema Timor na'in 300,000 bele semo tinan-tinan

Option 1, to the west and into the sea, does not widen the area and could be done without crossing the Comoro river, intruding into Bebonuk, or cutting off the road to Beto Tasi. It would displace fewer than ten families.

Option 2, widening the clearance area and extending the runway east across the river into Bebonuk, would cut off 700 people in Beto Tasi and displace hundreds more in Bebonuk and Beto Timur.



Zona Merkadu Espesiál iha Oekusi

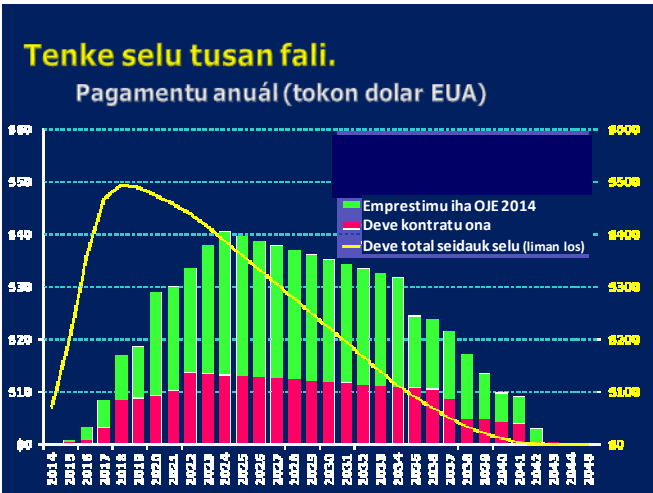
- Saida mak vantage kompetitivu iha Oekusi?
- ZEESM bele justifika investimentu billaun \$4?

Se mak hetan benefisiu: Oekusi sira ka politiku na'in sira?

TL sai devedor.

- Lei iha 2009 fó dalan.
- Tinan 2012 Timor-Leste asina kontratu sira atu empresta token \$107 hosi Japaun no ADB.
- Iha 2013 TL asina kontratu rua tan ho ADB no Banku Mundial ba token \$90.
- Iha OJE 2014 Timor-Leste sei deve token \$31.
- Durante 2014-2018, TL hakarak empresta token \$500. Hare OJE ba infrastrutura:

2014	2015	2016	2017	2018
\$31m	\$117m	\$158m	\$140m	\$37m



Buat ruma importante atu hanoin



- Ezekusaun SDP sei presiza empresta dolar billaun ruma, ho taxa funan komersial.
- Maski funan konsesional, atu selu fali deve sei hatun osan iha Fundu Petroliferu. Deve iha yen, selu iha dolar, la bele kontrola.
- TL nia mina no gas limitadu, naun-renovable, no la bele hatene folin iha futuru.
- Maski osan laiha, GoTL tenke prioritiza atu selu tusan uluk, molok dezenvolve povu.
- Ita nia oan no be-oan sira hetan tusan hafoin kampu mina no gas maran ona.

Uza www.laohamutuk.org

Instituto ba Analiza no Monitor Dezenvolvimentu iha Timor-Leste
Timor-Leste Institute for Development Monitoring and Analysis
Institut Pemantauan dan Analisis Pembangunan Timor-Leste

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Obrigado barak.

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- La'o Hamutuk nia website
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