

**Kuarta, 29 de Feveiru, 2012**

## Orsamentu no Kontextu Ekonomia Makro Timor-Leste nian



Institutu ba Monitor no Analiza Dezenvolvimentu iha Timor-Leste  
Rua Martires da Patria, Bebora, Dili, Timor-Leste  
Tel: +670 3321040 email: [info@laohamutuk.org](mailto:info@laohamutuk.org)  
Website: [www.laohamutuk.org](http://www.laohamutuk.org)

## Saida mak Ekonomia

### Saida mak Ekonomia

- La'os gasta riku soi ne'ebe ita iha, maibe kria riku soi foun.
- Ekonomia Timor-Leste agora la'o tanba de'it gastus, la'os kria riko-soin foun.
- Wainhira ita gasta de'it saida mak ita iha, ita la kria riku soi foun, rezerva mina hotu, no populasaun aumenta, saida mak sei akontese?

## OJE no Ekonomia Makro

- OJE Tenki hare iha kontextu aproximasaun Dezenvolvimentu
- OJE la'os hamrik mesak, maibe parte ida hosi sistema ekonomia Makro ninian.
- OJE hanesan planu asaun annual hosi modelu dezenvolvimentu.
- Ita sei labele komprende OJE se ita la hatene vizaun Governu nian no modelu Dezenvolvimentu

## Pergunta hirak ne'ebe mosu

- Orsamentu ne'e atu lori TL ba ne'ebe?
- Seitor ida ne'ebe hetan prioridade liu?
- Oinsa Orsamentu ne'e afekta sosiedade tomak?
- Grupu iha sosiedade ida ne'ebe mak sei hetan benefisiu liu?
- Oinsa desizaun ida agora nian sei impaktu ba TL iha tempu naruk?

## Terminolojia Importante Balu

GDP: Gross Domestic Product/Total Produtividade Domestik  
Non-oil GDP/Produtividade rai laran, la inklui mina.  
Gross National Income/Total Rendimentu Nasional  
Trade Balance/Balansu Komersiu (Sasan no Servisu)  
Inflation/Inflasaun  
Human Development Index (Indexu Dezenvolvimentu Umanu)  
Consumer Price Index /Indexu Presu Konsumidor  
Population Growth Rate/Nivel Kresimentu Populasaun  
Unemployment Rate/Nivel Dezempregu  
Economic Sectors: Agriculture, Manufacturing, Services/Seitor Ekonomia  
Investimentu  
Retornu  
Ekonomia formal no informal

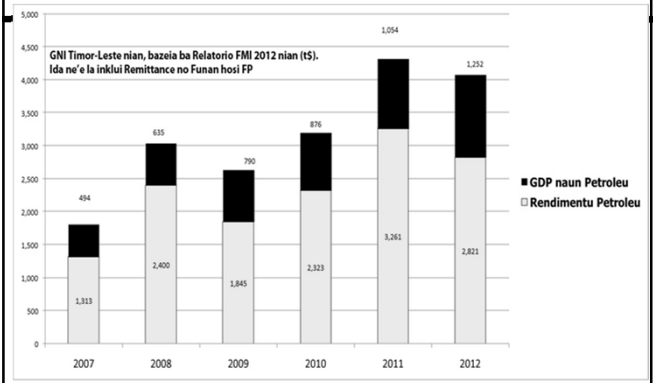
Public Sector/Seitor publiku  
Private Sector/Seitor Privadu  
Public-Private Partnership/Parseiru Publiku no Privadu  
Cooperative Sector/Seitor kooperativa  
Petroleum-Dependent Economy/Ekonomia ne'ebe Dependene ba Petroleu  
Rentier Economy/Ekonomia ne'ebe depende ba fo aluga  
Dutch Disease/Moras Olanda  
State vs Market/Estadu vs Merkadu  
Fiscal and Monetary Policy/Politika Fiskal no Monetariu  
Public or State owned Enterprises/Emprezariu Publiku ou Estadu  
Deregulation/Hasai regulamentu  
Privatization/Privatizasaun

## Panorama Jeral Ekonomia TL

- Despesas estadu iha 2011: token \$1,306. iha 2012 token \$1,674 (Inklui deve)
- GDP naun-petroleu iha 2011: token 1,054. iha 2012 token \$1,252.
- GNI iha 2011: t\$4,315. (t\$3,261 husi mina) iha 2012: t\$3,020. (t\$2,090 husi mina)

GNI la inklui Remittance no Funan hosi FP.

## Mina domina GNI TL Nian



## Inflasaun

### Saida mak inflasaun?

- Ezemplu: kazu Indonezia iha 1997 no Zimbabwe iha 2009
- Povu Ki'ik mak sofre liu – taxa ba povu ki'ik
- Hamate inisiativa atu hahu negosio
- Sinal hosi "Malisan Rekursu"

## Inflasaun mai ho malisan rekursu



## Fator ne'ebe kontribui

### External

- Depresiasaun Dollar ba moeda vizinu -- Indonesia no Australia...?
- Folin mina iha merkadu internasional no Impaktu

## Fator Internal

- Politika Fiskal – Gasta boot
- Falta Produtividade lokal
- Falta kapasidade lokal atu absorve osan ne'ebe sirkula iha merkadu
- Fallansu hosi sistema merkadu (Ema halo lukru boot liu - Oligopolistik)

## Impaktu hosi Inflasaun

- Sasan folin sa'e
- Kapasidade atu hola sasaun tun
- Ema ki'ik mak sofre liu
- Difikuldade atu hahu negosio
- Aumenta dependensia ba importasaun
- Produsaun lokal labele kompete

## Dependensia ba Importasaun

- Parte hosi Malisan Rekursu
- Abandona seitor seluk
- Nega katak mina sei hotu

### Substituisaun Importasaun

## Balansu Komersiu

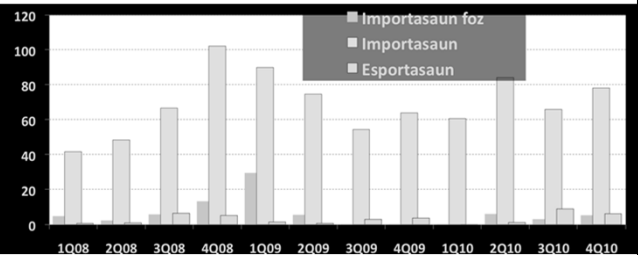
Balansu Komersiu iha Timor-Leste 2010 (tokon USD)

Kategoria	Importa	Esporta	Balansu
Sasan	\$289 (relatoriu DNE)	\$17 (96% cafe)	(\$272)
Sasan seluk (liur prosesu legal)	\$200 (LH estimatiza)	\$0.3 (LH estimatiza)	(\$200)
Servisu	\$505 (2009, husi BPA)	\$3 (LH est. remittances)	(\$502)
<b>Total esklui mina</b>	<b>\$994</b>	<b>\$20</b>	<b>(\$974)</b>
Reseitas mina no gas (ba estadu)	--	\$2,016 (inklui \$294 funan Fundu Petrol.)	\$2,016
<b>Total</b>	<b>\$994</b>	<b>\$2,036</b>	<b>\$1,042</b>

Dadus hosi DNE la inklui: sasan ne'ebe tama illegal, sasan ne'ebe tama la liu hosi sistema ASCYUDA

Ami seidauk iha dadus kompleta ba 2011 nian, maibe durante quarter terseiru 2011 nian, sasan ne'ebe tama 70% barak liu duke kuarter terseiru 2010 nian.

## Balansu komersiu iha TL



Grafiku hatudu komersiu legal ho sasan.

Cafe mak 96% esportasan naun-mina durante 2010.

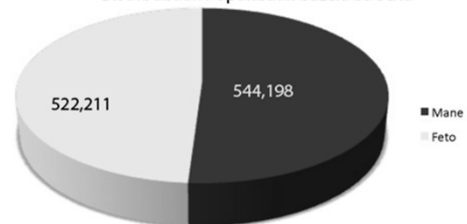
89% doador nia gastu, no 70% estadu nian, ba rai liur.

## Ema nu'udar Rekursu importante liu

- Total Populasaun tokon 1.1
- Kresimentu Populasaun (2.4%/tinan no tun kada tinan)
- Signifika katak ezizensia ba servisu baziku hanesan edukasaun, saude, saneamentu, infraestrutur, sei aumenta.
- Maibe ita nia rezerva mina menus hosi tempu ba tempu.

## Situasaun Demografiku Timor-Leste

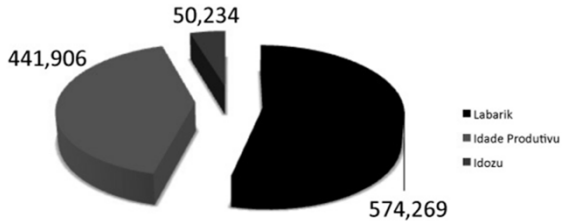
Distribuisaun Populasaun bazeia ba Sexu



Bazeia ba Sensus populasaun no uma kain 2010

## Populasaun Tuir Idade

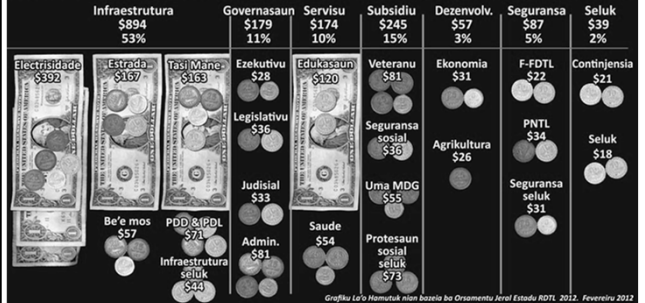
Distribuisaun populasaun bazeia ba grupu idade



Bazeia ba sensus populasaun no uma kain 2010 nian

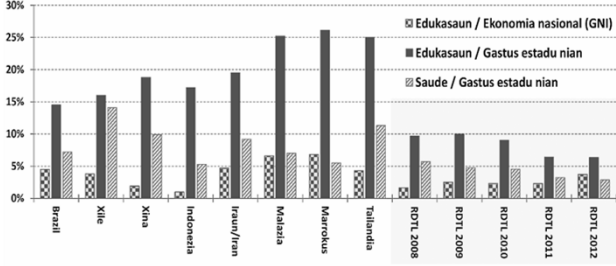
## Alokasaun Orsamentu ba kada sektor

Alokasaun Orsamentu Estadu 2012 (\$1,674 tokon dolar EUA)

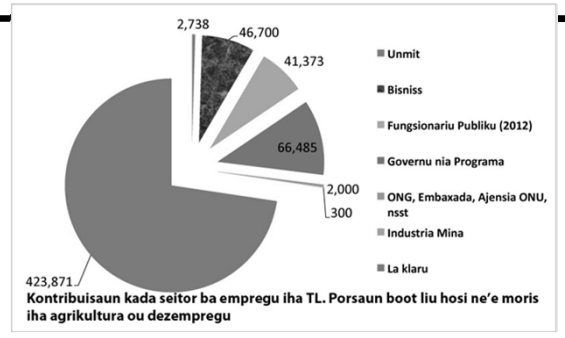


## Kompara ho nasaun seluk

Alokasaun orsamentu ba saude no edukasaun iha Timor-Leste no nasaun seluk



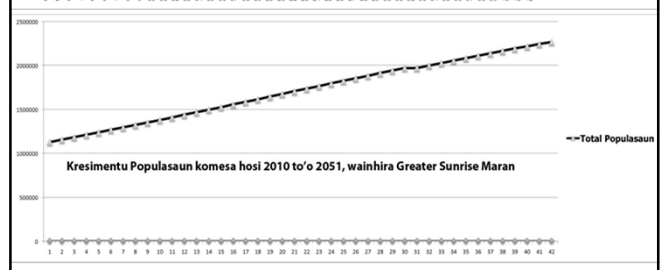
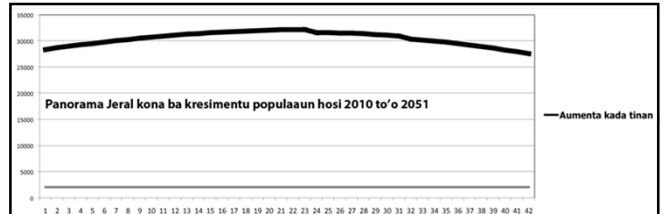
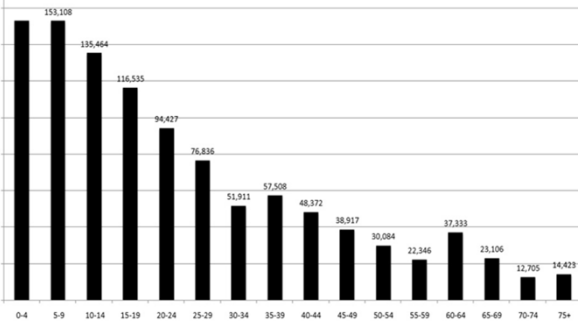
## Grafiku kona ba Merkadu traballador



Tasi Mane sei bele fo servisu 3,000 ??

## Perigu iha Futuru

Distribuisaun Populasaun tuir Idade, bazeia ba Sensus Populasaun 2010



## Dili diferente tebes husi distritu

From Timor-Leste Demographic and Health Survey 2009-2010

Table 2.11 Wealth quintiles

Percent distribution of the de jure population by wealth quintiles, according to residence and region, Timor-Leste 2009-10

Residence/ region	Wealth quintile					Total	Number of population
	Lowest	Second	Middle	Fourth	Highest		
<b>Residence</b>							
Urban	4.5	6.1	9.3	22.2	57.8	100.0	15,852
Rural	24.6	24.2	23.3	19.2	8.7	100.0	51,134
<b>District</b>							
Aileu	20.6	27.9	25.1	18.2	8.2	100.0	2,785
Ainaro	30.9	32.2	19.7	12.1	5.2	100.0	3,830
Baucau	26.9	28.9	19.3	13.4	11.5	100.0	7,590
Bobonaro	15.2	19.7	26.1	27.8	11.1	100.0	6,323
Covalima	17.2	17.7	23.1	25.1	16.8	100.0	3,993
<b>Dili</b>	<b>0.4</b>	<b>2.1</b>	<b>6.5</b>	<b>20.1</b>	<b>71.0</b>	<b>100.0</b>	10,905
Ermera	9.8	30.2	31.9	21.5	6.6	100.0	8,132
Lautem	28.0	16.7	20.4	24.5	10.4	100.0	4,547
Liquiçá	15.7	18.8	25.3	25.1	15.2	100.0	4,082
Manatuto	22.2	10.9	22.5	27.7	16.8	100.0	3,088
Manufahi	28.3	25.1	18.1	16.6	12.0	100.0	2,699
Oecussi	46.6	17.1	14.4	14.2	7.6	100.0	4,281
Viqueque	35.3	25.5	17.4	13.0	8.7	100.0	4,730
Total	19.9	19.9	20.0	19.9	20.3	100.0	66,985

## Rendimentu iha Futuru

- Bayu Undan no Kitan
- TL sei hetan tan billaun \$13.5
- Kitan sei maran antes 2016
- Bayu Undan sei maran iha 2024

## Greater Sunrise

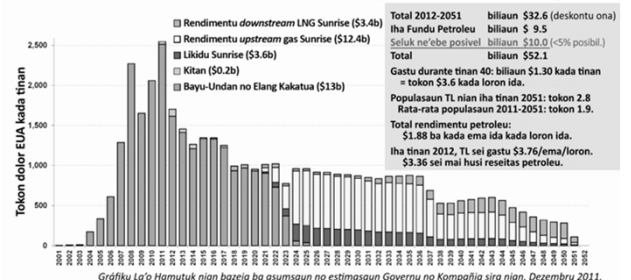
- LNG Downstream : billaun \$3.4
- LNG Upstream : billaun \$12.4
- Sunrise Liquids : billaun \$3.6

LH nia Estimativa:

- La inklui osan ne'ebe TL sei gasta atu dezenvolve
- LH nia estimatizasaun ba folin LNG as liu

## Projesaun ba Rendimentu iha Futuru

Rendimentu Petroleu kada tinan-tinan ba Timor-Leste  
Karik konstrusaun Sunrise nian hahu iha 2016. (Deskontu 3.7% kada tinan)



## Situasaun Merkadu Global

- Krize Finansial iha Eropa
- Krize politiku iha Mediu Oriente
- Depresiasaun no Apresiasaun Dollar

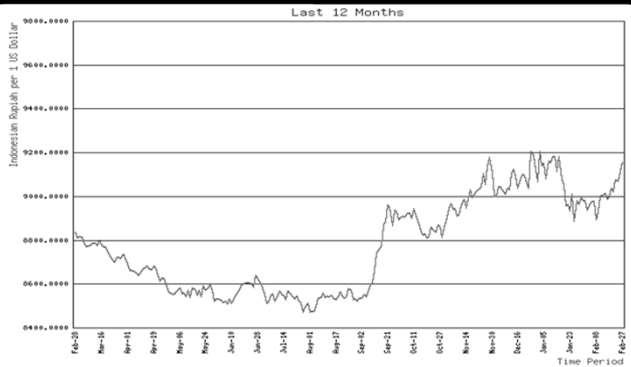
## Folin Gas iha Merkadu Internasional

Natural gas spot prices (Henry Hub)



Source: Natural Gas Intelligence

## Komparasaun Dollar hasoru Rupiah



## Dollar US no Australia



## Depresiasaun Dollar no nia impaktu ba TL

- Exportasaun TL nian baratu iha merkadu internasional
- Importasaun sai karun liu
- Dudu Inflasaun iha Timor-Leste

## Impaktu Mina folin sa'e ba TL

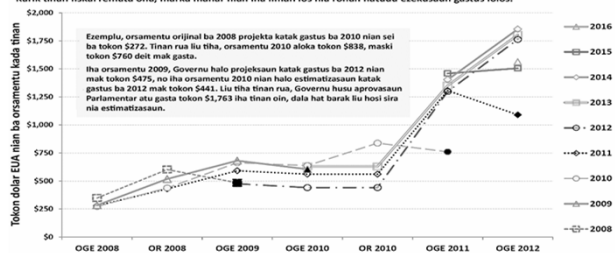
- Di'ak ba Estadu
- At ba povu

## Susar atu fiar Governu nia Projesaun

### Estimatizasaun orsamentu ne'ebe muda hosi tempo ba tempo

Kada liña representa total projesaun ba gastus estadu nian durante tinan fiskal balu, hanesan iha orsamentu tinan kotuk. Karik projesaun ne'e los, liña ne'e sei halai los – horizontal.

Karik tinan fiskal remata ona, marka mahar nian iha liman los nia rohan hatudu ezekusaun gastus folos.



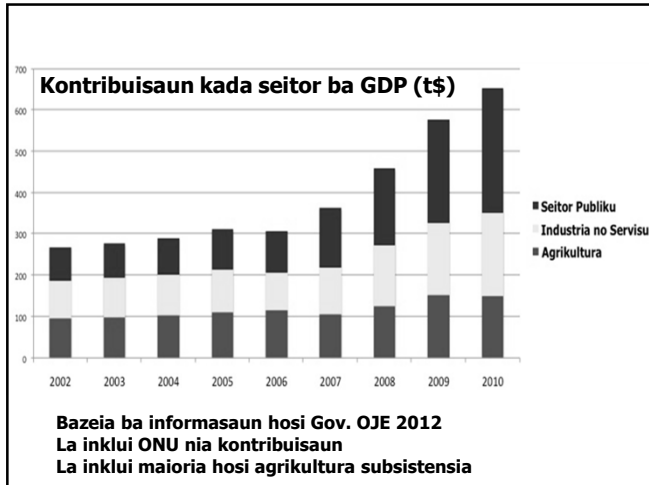
Wainhira Governu publika estimatizasaun (iha dokumentu orsamentu)

Grafiku hosi La'o Hamutuk basea ba dokumentu orsamentu hosi Ministeriu Finansas nian ba kada tinan.

## Saida mak ita Nota?

- TL iha 2011 riku liu duke 2012.
- Populasaun aumenta kada tinan ho persentajem 2.4% agora dadaun.
- Iha tinan lima oin mai, labarik sira ne'ebe moris iha 2000, sei tama ba kampu do servisu

Agora dadaun, Timor-Leste presiza emprego foun ba joven nain 15,000 sai trabalhador iha tinan ida ne'e.



## Sirkulasaun gastus estadu mak kontribui ba GDP

- Foti Ezemplu 2012 nian
- FMI Halo projeksaun katak GDP naun Petroliferea nian katak billoens \$1.2
- Ami kalkula katak +/-478 sei mai hosi gastus Gov. nian
- Tokon \$60 sei mai hosi gastus UNMIT no ajensia int'l.

## Taxa

- Taxa Nu'udar meius intervensaun Estadu nian iha merkadu
- Taxa nu'udar meius distribuisaun riku-soin
- Taxa nu'udar meius atu proteze autor ekonomia lokal
- Taxa nu'udar dalam atu hetan rendimentu
- Taxa indika lejitimidade estadu nian
- Taxa hametin relasaun estadu no sosiedade
- Taxa meius atu halo disiplina sidadaun

## Taxa oi-oin iha TL

### Taxa Direita

- Taxa rendimentu (Income Tax)
- Taxa ba Kompania
- Withholding tax

### Taxa Indireita

- Taxa Servisu (Serive Tax)
- Taxa ba fa'an sasan
- Excise Tax
- Import Duties

## Problema ho taxa

- Taxa ba sasan luxu (Kareta, TV, Zelera)
- Taxa ba rendimentu pessoal
- Koleksaun Taxa
- Sasan tama Illegal
- Sasan ne'ebe ajensia int'l hatama

Taxa ki'ik fo insentiva ba investimentu rai li'ur...?

## Urgensia baDezenvolvimentu Naun Petrolifera

- Governments in Timor-Leste have shown themselves to be fully capable of managing the Fund. Additionally, in recent years, the Government has succeeded in reducing the potential for seriously divisive conflict. However, the potential for conflict remains, and can be fuelled by continuing sources of resentment. As the TLNHDR argues in its last two chapters, potential bases for resentment can best be addressed by an inclusive and equitable development of the non-oil – reducing poverty in the agricultural sector by improving rural livelihoods and generating employment in non-agricultural sectors." (UNDP TLNHDR 2011)

## Analiza SWOT ba seitor naun Petroleu

Strength/Forsa	Weakness/Frakeza	Oportunidade/Oportunidade	Threat/Ameasa
Iha Osan	Hakarak gasta arabiru	Bele hadi'a manajementu	Korupsaun
Iha Ema/Jovem	Inisiativa	Insentiva	Kiak/Merkadu ki'ik
Iha rai	Rai barak mak la abandona	Aumenta produtividade	Sasan importasaun
Nasaun Foun	Infrastrutura sei falta	Aprende hosi nasaun seluk	Mentalidade dependencia
Iha Parseiru Dezenvolvimentu	Objetivu ba tempu badak	Servisu hamutuk	Krize ekonomia global
Iha Jovem barak	Barak mak dezempregu	Hahu ho industria ki'ik	Konfliktu/Time bomb
Iha Governu	Seidauk forte	Eleisaun	Korupsaun no maladministrasaun
Sei iha komitmentu hosi Timor-oan	La hatene atu hahu investe	Esplora ideias alternativa balu	Desperadu
Iha instituisaun do estadu	Sei fraku	Instituiusaun existe	

## Dezenvolve Seitor naun Petroleu

### Agrikultura

1. Tenki sai Baze Ekonomia
2. Investimentu booot
3. Presiza aumenta produtividade
4. Hamenus ita nia dependencia ba aihan importasaun no atinzi soberania ai-han

### Kapasidade produtividade

### Fertilidade Rai nian

### Mudansa Klimatika

## Eko Tourizmu

- Opsaun Tourizmu ba TL
- Iha Tasi Ibun

- Presiza dezenvolve fatin istoriku sira
- Kultura Timor-Leste nian
- Natureza

### Dezafiu

Australia no Bali

Infrastrutura

Sistema Saude Publiku

Kustu Moris

Lei no Ordem

Falta ospitalidade

## Industria ki'ik no mediu

- La presiza kapital boot
- Bele kria kampu servisu ba ema balu
- Lori substitui importasaun
- Hamenus dependencia ba importasaun

### Problema:

Inflasaun

Taxa

Kontrola importasaun

## Investimentu Rai li'ur

- TL nia Vantajem Komparativu...?????
- Lei
- Infrastrutura.....?????
- Saude Publiku...?????
- Kustu Traballador.....?????
- Mentalidade Timor oan

## Se mak atrativu liu?

Kategoria	Indonesia	TL
Traballador	Edukadu, treinadu, Baratu	La servisu maka'as, karun, Gosta resisti
Infraesrutura	Di'ak no Baratu	Estrada at ba bebeik
Telekomunikasaun	Di'ak no Baratu	Karun no susar
Raw materil (bahan mentah)	Barak	Seidauk hatene
Kustu produsaun	Baratu liu	Karun liu
Merkadu	Boot liu	Ki'ik liu



### UNMIT no Nia Kontribuisaun ba GDP

- UNMIT nia kontribuisaun ba GDP naun-Petrolifera
- Timor-oan ne'ebe servisu ho UNMIT
- Gasta hosi kada staff UNMIT nian
- Impaktu depois sira sai iha fim do 2012.

### UNMIT nia gastus ne'ebe tama ba ekonomia lokal

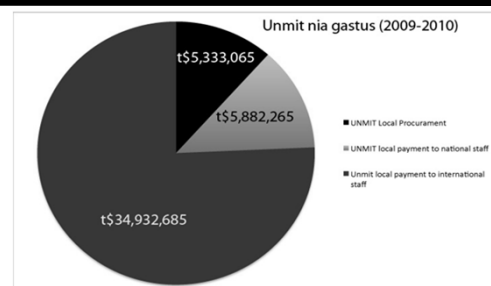
- Hola sasan iha rai laran
- Ema ne'ebe hamos rai (Cleaner)
- Servisu Seguransa
- Freight
- Media
- Print no reprodusaun
- Komunikaun

### Kompozisaun Staff Nasional iha UNMIT

- **Offisiais Professional Nasional** : 68
- **Servisu Nasional Jeral** : 830
- **APAC Security** : 1,136

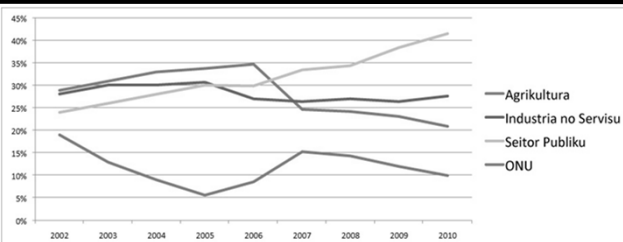
Saida mak Security APAC sira sei halo depois de UNMIT sai?

### Unmit nia gastus



Ida ne'e la inklui gastus pessoal kada staff ONU nian, ne'ebe karik boot liu

### ONU nia kontribusaun ba GDP ki'ik



Bazeia ba informasaun hosi Gov. OJE 2012

### Sustentabilidade

Kresimentu Populasaun

Seitor naun petrolifera

Inkulivu

Igualidade Jeneru

Equidade entre jersaun

Demokrasia

Lei no Ordem

## Retornu hosi investimentu ohin loron

Oleu Pezadu – Investimentu ka gastus?

Auto Estrada – Ba saida no nia retornu oinsa?

Projetu Tasi Mane – Ema na'in hira mak atu hetean servisu?

## Tanba ne'e....

- Investe ba ema nu'udar xave (Edukasaun no Saude)
- Agrikultura tenki sai baze ba tinan 10-15 oin mai
- Investe la'os gasta
- Soberania Ai-han
- Lalikan hanoin atu exporta
- Substituisaun ba importasaun (Be mos, Jus, ahi-kose)
- Industria ne'ebe bele akumula traballador barak (Labor intensive industry)
- Orsamentu ne'ebe iha sensibilidade ba Jeneru

Lalikan hanoin atu atrai investor

## Planu Estratejiku Dezenvolvimentu Nasional

- Mehi TL atu sai "Middle Income Country" iha 2030
- Industria Petroleum atu sai "Comparative advantage" TL nian iha rejiaun
- Atu gasta ho retornu la klaru
- Deve, maibe la klaru oinsa atu selu

## Ema tenki sai baze

- Kazu Koreaia du Sul, Singapore ou sel-seluk tan
- Labarik barak
- Objektivu la klaru
- Investimentu ba saude
- Dezenvolvimentu Rural

## Pergunta no Komentariu