

## Sustentabilidade Fundu Petrolíferu iha Timor-Leste no solusaun alternativa liga ho diversifikasaun ekonomia

Aprezentasaun husi Charles Scheiner  
ba Oxfam nia Webinar

22 Abril 2021

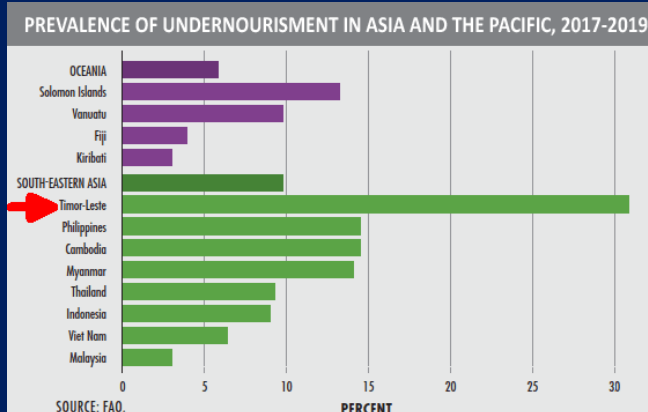


### Estatística Báziku

- 1/3 husi povu Timor-Leste moris iha kiak nia laran, 46% iha kiak multi-dimensional.
- 2/3 husi povu moris iha area rural, maioria nudár agrikultór subsistente.
- Sanitasaun la di'ak no malnutrisaun endemiku ona.
- Kuaze 1,200 labarik Timoroan iha tinan < 5 mate tanba kondisaun ne'ebé bele prevene kada tinan ... Dala 30 barak liu ema ne'ebé mak mate tanba ema oho.

## Labarik Timor-Leste mak sofre maka'as liu malnutrisaun kompara ho nasaun Aziátiku.

- Maioria labarik sira iha rural area sofre raes badak (stunting).
- Labarik ho malnutrisaun bele hetan konsekuénsia la di'ak permanente.
- Sorin balu husi povu TL iha idade menus husi 20.
- Labarik barak ne'ebé la edukadu sei labele sai servisu-na'in produtivu ka inan-aman ne'ebé optimal.



## 1. Dependénsia ba Petróleu

**Timor-Leste sai ona nasaun ida ne'ebé mak depende maka'as ba esportasaun petróleu.**

**Ida ne'e determina ita nia Estadu, ita nia ekonomia no ita nia futuro.**

**Maibé labele kontinua.**

## Sinál "malisan rekursu" nian (1)

- **Halo desizaun ho hanoin katak osan husi mina sei nunka hotu**  
Kitan hotu ona, Bayu-Undan sei maran iha 2023.
- **Mehi de'it kona-ba riku soin husi rai**  
Ne'ebé mak hetan sein halo servisu maka'as
- **Deve osan ohin loron, hodi selu fila fali iha futuru**  
TL dala ruma sei deve biliaun barak ba projetu ne'ebé ho possibilidade ba retornu ne'ebé ki'ik.
- **Falta planu longu-prazu ne'ebé realistíku**  
Planu Estratéjiku Dezenvolvimentu 2011-2030 hanesan mehi de'it; Tasi Mane ho ZEESM dala ruma sei fó benefísiu ki'ik liu kustu.
- **Uza osan hodi 'rezolve' problema hotu-hotu**  
Sosa bolsu estudu iha rai li'ur fasil liu duké jere universidade iha rai laran.

## Sinál "malisan rekursu" nian (2)

- **Gasta sein hanoin kle'an**
- **Dependénsia ba importasaun**  
TL nia defisit komérsiu naun-petrolíferu maizumenus dolar biliaun ida kada tinan.
- **Ignora dezenvolvimentu no reseita naun-petrolíferu**  
Susar atu imajina oinsá atu desenvolve agrikultura, maske mina sei la kontinua ba tempu naruk.
- **Benefísiu halai liu ba elite polítiku no area urbanu.**  
Maioria povu sei la uza auto-estrada, aeroportu ho facilidade petrolíferu, maibé sei lori todan mós ba kustu ne'ebé gasta ba buat hirak nee.
- **Petróleu domina tiha lia-loos ba halo desizaun.**  
Agrikultura, turizmu, indústria ki'ik sira, nsst. la hetan oportunidade ne'ebé justu.

## Dependéncia ba Petróleu (nominal USD)

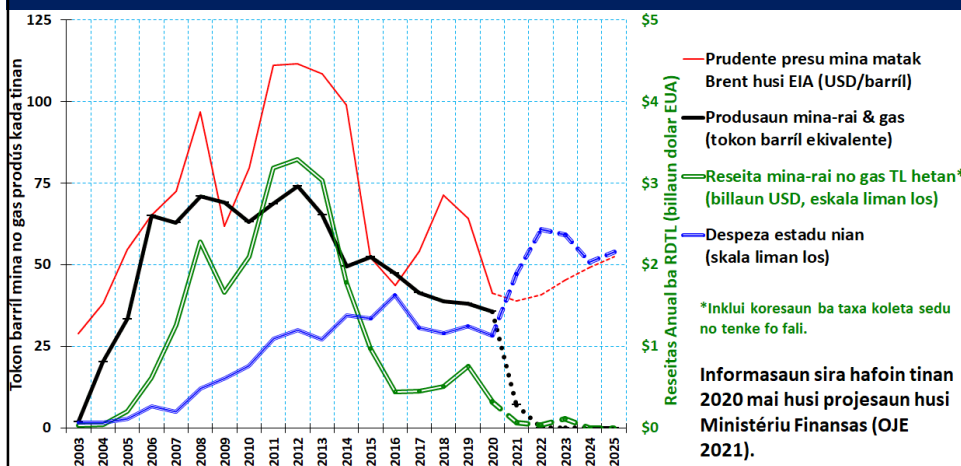
	2013	2014	2015	2016	2017	2018	2019
<b>PIB Petróleu</b>	\$4,234 (75%)	\$2,591 (64%)	\$1,496 (48%)	\$820 (33%)	\$895 (36%)	n.a.	n.a.
<b>PIB la'ós mina</b>	\$1,396 (25%)	\$1,447 (36%)	\$1,594 (52%)	\$1,651 (67%)	\$1,599 (64%)	\$1,560	\$1,674
<b>Produtivu (agrik. &amp; manuf.)</b>	\$308	\$317	\$300	\$299	\$297	\$304	\$317

- Reseita Estadu iha 2019** **token \$3,056**  
 token \$2,101 husi investimentu Fundu Petrolíferu  
 token \$ 756 husi reseita mina no gas  
 token \$ 199 husi fonte non-petrolíferu sira
- Orsamentu Estadu 2019 ne'ebé ezekuta ona:** **token \$1,242**  
 token \$969 transferénsia husi Fundu Petrolíferu (t\$1,482 apropriada)  
 token \$199 reseita (doméstika) husi non-petrolíferu  
 token \$ 50 husi deve ne'ebé tenke selu fila fali
- Atividade estadu nian, selu husi osan mina nian, besik sorin balu husi ekonomia "la'ós mina" tanba osan sira ne'e balu sirkula iha ekonomia lokál.
- Rendimentu husi petróleu no investimentu sei halai ba estadu, la'ós ba ema.

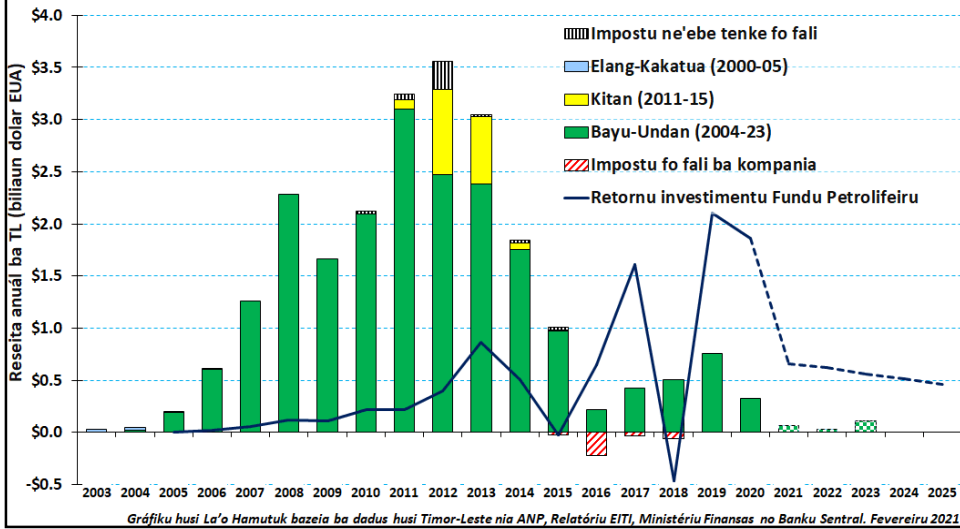
**Sudan Sul, Libya (no Guinee Ekuatorial?) de'it mak iha dependénsia maka'as liu ba esportasaun mina no gas kompara ho TL antes 2014.**

## Reseita mina-rai no gas tun ba beibeik hafoin tinan 2012.

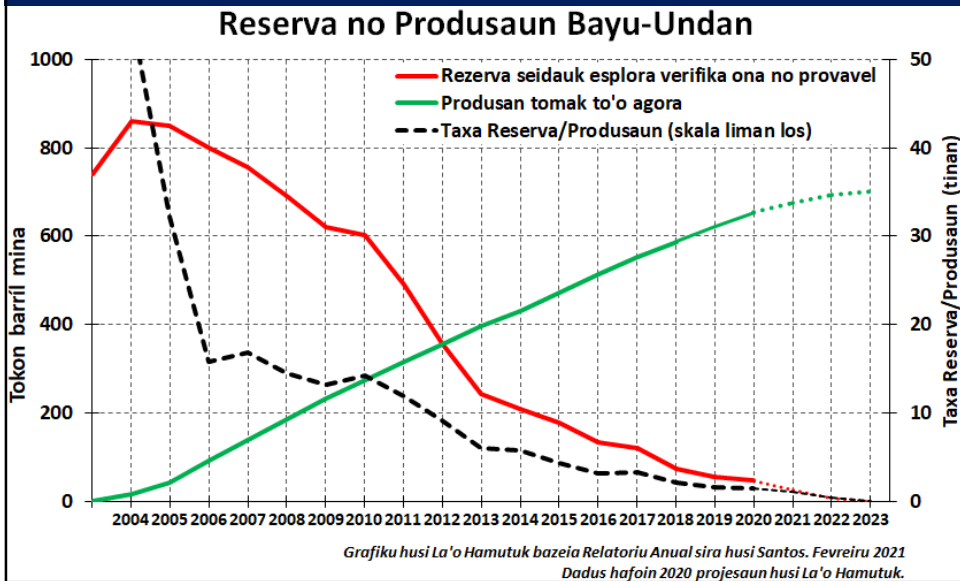
Produsaun tun maka'as kompara ho folin, no sei la sa'e tan.  
 Folin sei la relevante bainhira ita laiha ona buat ida atu fa'an.



# Timor-Leste nia reseita mina nian mai husi ne'ebé?



# Bayu-Undan besik atu hotu ona.



## Maibé ita laiha rezerva mina barak.

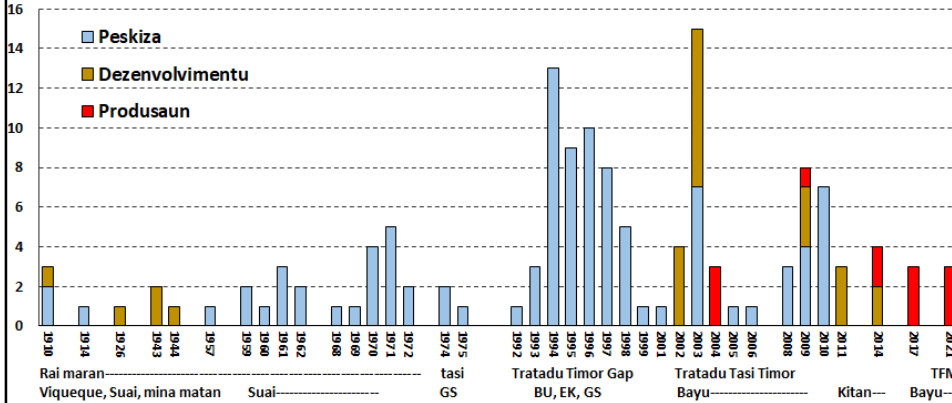
	Timor-Leste (70% Sunrise)	TL laho Sunrise	Australia (30% Sunrise)	Australia laho Sunrise	Indonesia	Brunei
Rezerva mina no gas ne'ebé verifika to'o fin 2019 (tokon barril)	540	32	16,400	16,200	10,900	2,500
Rezerva mina no gas ba kada ema, ne'ebé verifika to'o fin 2019 (barril/ema)	420	25	650+	640+	40	5,700
To'o bainhira mak rezerva sira ne'e sei iha nafatin, bazeia ba nivel produsaun 2019 nian	tinan 19	tinan 1	tinan 15 +	tinan 15 +	tinan 16	tinan 20

## Hahú iha 1910, kompañia mina fura ona posu peskiza 95 iha Timor-Leste.

Sira hetan rezerva mina 8 ne'ebé viavel komersialmente.

Kitan mak posu ida de'it ne'ebé deskobre iha tinan 20 ikus ne'e.

Númeru husi posu mina-rai no gás ne'ebé fura kada tinan iha Timor-Leste nia territóriu



Grafika husi La'o Hamutuk bazeia data istorku no dadus husi ANPM Lafaek database

## Ita Peskiza ba iha ita nia tasi hahú tiha ona iha tinan lima-nulu, no iha rai maran naruk liu.

**Bayu-Undan no Kitan de'it mak verifika ona, no sira besik atu mamuk.**

**Sunrise no Buffalo sei hein investor ne'ebé bele investe.**

**Posibilidade sei laiha tan kampu seluk viaavel ba komersiál .**

Liña sira kór mataka hatudu peskiza sizmiku halo tiha ona.

**Area Timor-Leste kobre husi Kontratu Fahe Produsaun ba esplorasau mino no gas**

Area sira iha kór sinzas ne'e uluk iha tinan 2003 no 2006 iha kontratu nia okos, maibé agora livre hela. Area sira ho kór azul hetan kontratu molok tinan 2000. Sirkulu ho krus sira ne'e hatudu fatin posu atestadu ida ka lubuk ida ne'ebé fura durante tinan 50 ikus.

Liña ho kór mean hatudu fronteira maritima husi Tratadu ho Australia iha 2019.

Mapa husi La'o Hamutuk baseia ba informasaun husi ANPM BDTI no fonte seluk. Febreiru 2021

## Projetu sira pendente karik la ajuda barak.

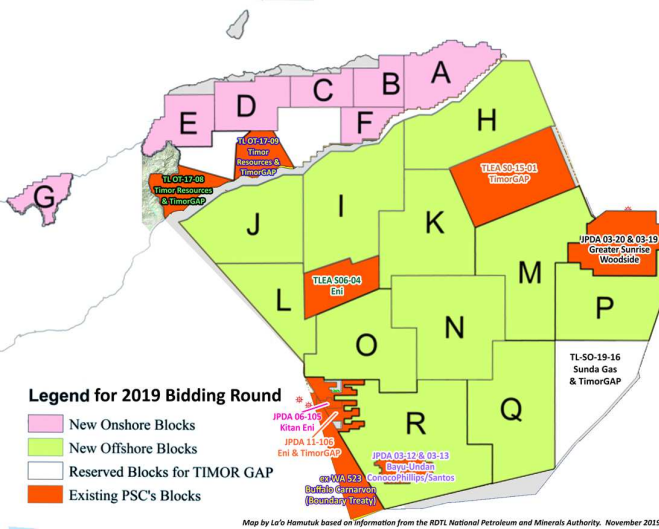
Projetu	Operadór (parseiru sira)	Rezerva mina no gas (mmBOE)	Reseita posivel iha futuru (token USD)	Situasaun atuál
Bayu-Undan posu ne'ebé eziste ona	Santos 46% (SK E&S, Inpex, Eni, JERA/Tokyo Gas)	20	\$209	Prodús ona mmBOE 653 dezde tinan 2004, no fornese ona token \$20,700 ba Timor-Leste. Produsaun sei remata iha tinan 2022.
Bayu-Undan posu foun	Santos 46% (SK E&S, Inpex, Eni, JERA/Tokyo Gas)	20	\$0	Sira sei fura posu tolu tan iha tinan 2020 nia klaran, bele prolonga produsaun tinan 1 ka 2.
Greater Sunrise	Woodside 33% (TimorGAP 57%, Osaka Gas)	1,080	?	Deskobre ona iha 1974. Buka finansiamentu atu kontinua atu dezenvolve. Kustu kapital boot tebes. TL sei hetan 70% husi reseita estadu nian.
Buffalo	Carnarvon 50% (Advance Energy)	31	\$465	Prodús ona mmBOE 20 iha 1999-2005 ba BHP no Australia. Sei fura posu ida foun iha tinan 2021.
Iha rai maran (Covalima & Manufahi)	Timor Resources 50% (TimorGAP)	40	\$600	Posu peskiza primeiru planu ba fulan Julu 2021.
Chuditch	SundaGas 75% (TimorGAP)	588(?)	?	Shell fura ona posu peskiza iha 1998 maibé la kontinua. Nain foun sira sei decide molok tinan 2022 remata atu fura ida tan ka lae.
Area kontratadu tolu tan	TimorGAP and Eni	?	Bele karik	Seidauk iha informasaun to'o atu kalkula rezerva posivel. Seidauk iha planu atu fura posu tan.
<b>TOTAL</b>		<b>111 (1,779?)</b>	<b>\$1,265</b>	<b>Previzaun optimístiku</b>



### Iha 2019-2021, ANPM halo konkursu atu hetan kompañia sira ne'ebé hakarak atu kontinua peskiza.

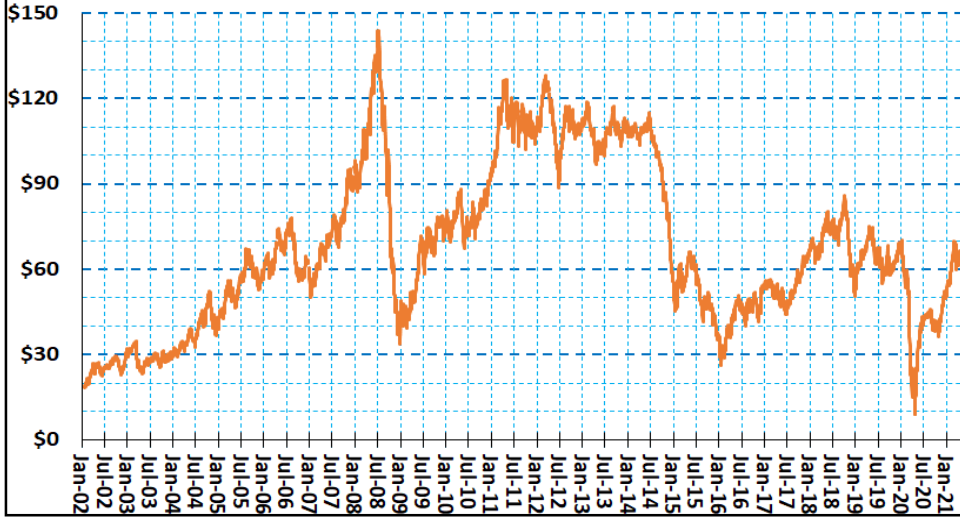
Kompañia sira seluk halo ona peskiza kuaze iha area sira ne'e hotu.

Tanba Covid-19 no folin mina ki'ik, nasaun barak kansela ka adia konkursu hanesan ne'e. Timor-Leste nian prolonga ba tinan ida, ate fulan Outubru 2021.



### Presu petróleu tuun, hanesan tinan 2005 bainhira RDTL hahú produsaun mina.

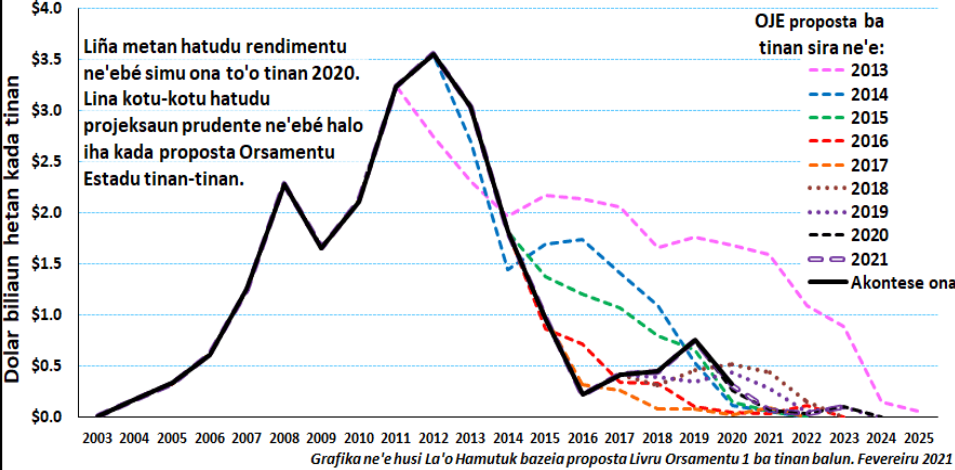
Folin mina "Brent Spot" (USD/Barril)





# Reseita husi mina menus liu espektasaun.

## Espektasaun reseita petroléu kada tinan iha futuru



**TL simu tiha ona liu 99% reseita ne'ebé sei simu husi Bayu-Undan no Kitan, no reseita sira ne'e sei remata iha 2023.**

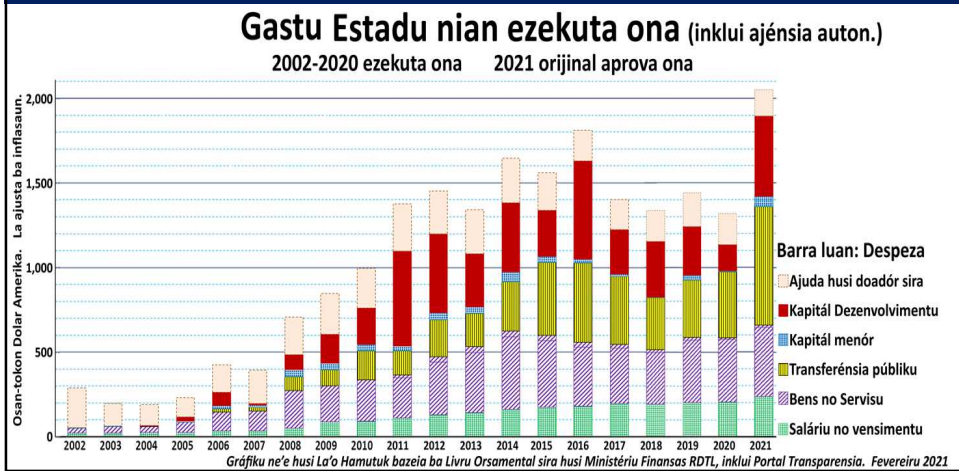
## 2. Prosesu Orsamentu Estadu

**Osan ba ne'ebé?**

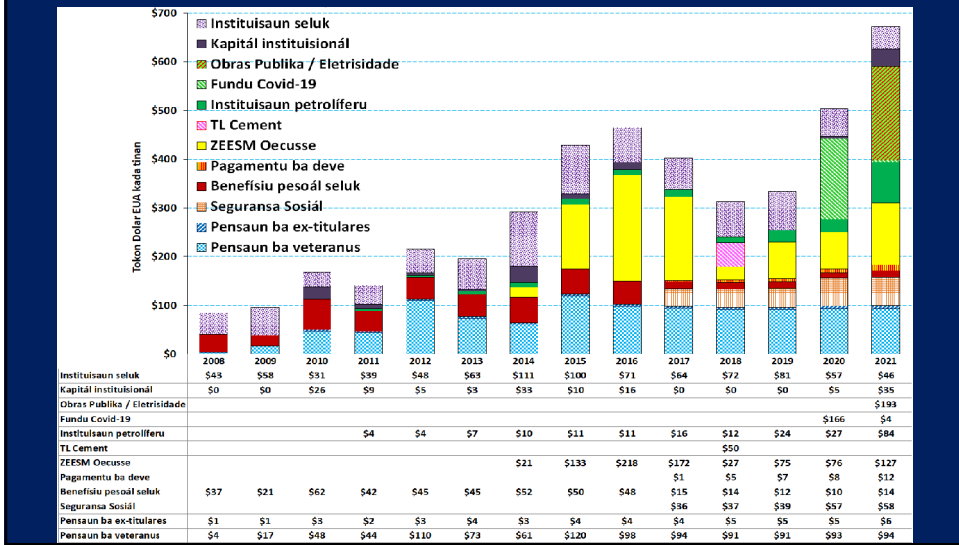
**Osan mai husi ne'ebé?**

**To'o ka lae?**

## Despeza iha OJE aumenta maka'as 2007-2016, depois estavel, agora sae dala ida tan (molok alterasaun)



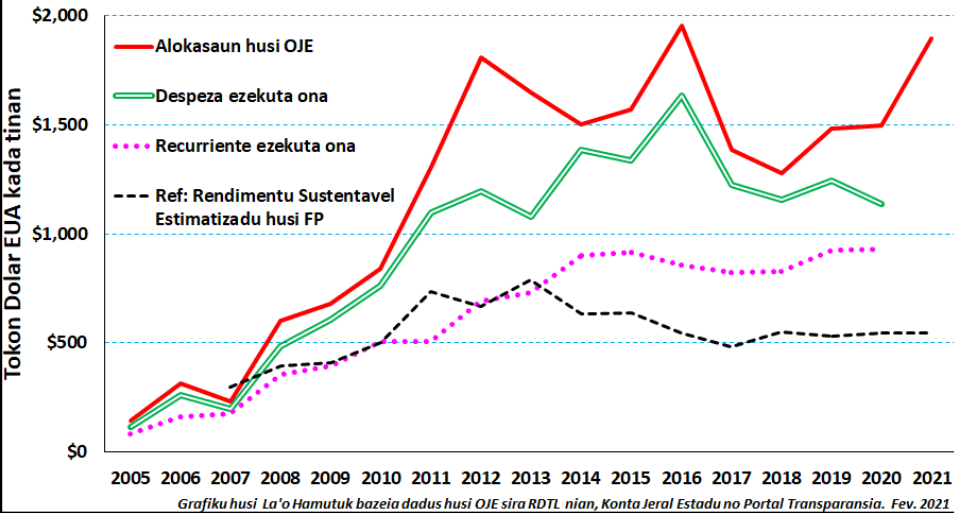
## Transferénsia Públiku mak kategoria boot liu, no retifikasaun sei aumenta.





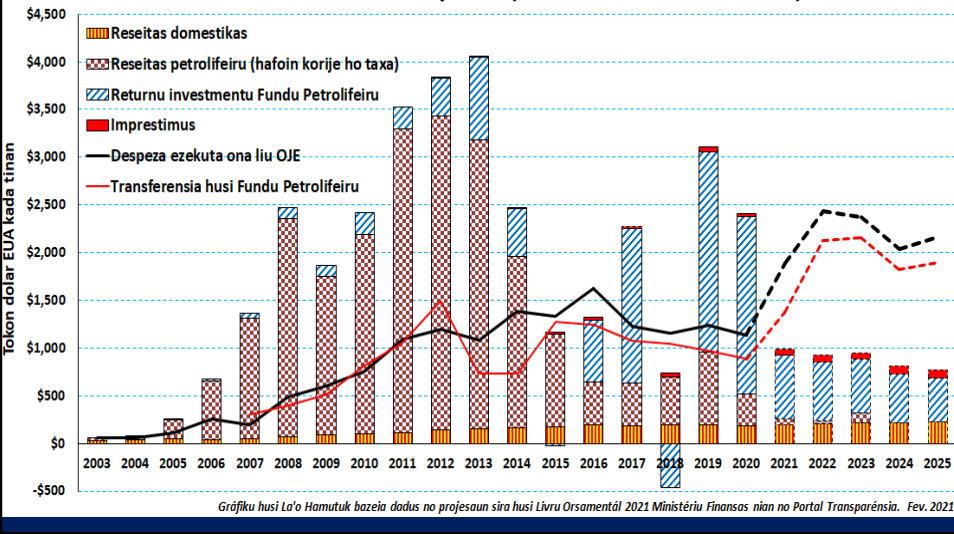
## Alokasaun no despeza ne'ebé ezejuta ona

Despeza tuir orsamentu, ezejutaun no recurrenente ba tinan ida-idak



## Despeza boot liu reseita

Estadu nia reseitas no despezas (inklui Fundu Petrolifeiru)

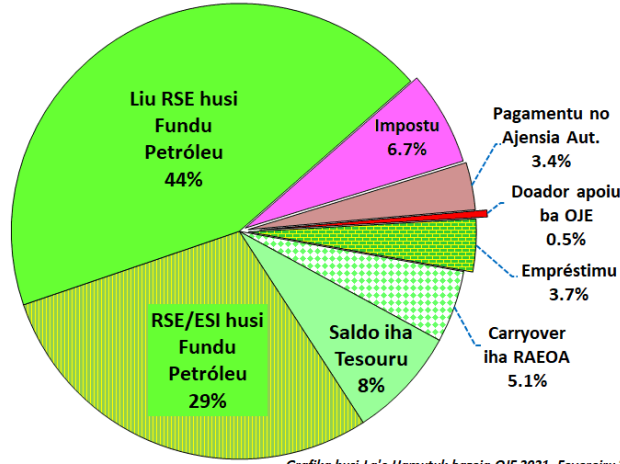


## Reseita iha Orsamentu Estadu

### Reseita iha OJE ba 2021

tokon \$1,895 total

86% mai husi Fundu Petrolifeiru iha pasadu, agora, ka iha futuru.



Grafika husi La'o Hamutuk bazeia OJE 2021. Feveiru 2021

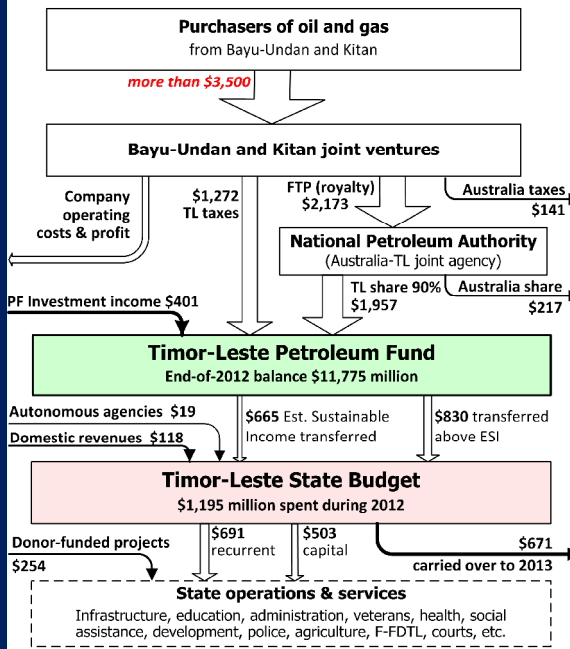
**Reseita husi petróleu sa'e to'o nia pontu aas liu iha 2012, no figura ne'e hatudu oinsá reseita ne'e tama no sai husi Fundu Petrolíferu.**

**Seidauk iha mudansa iha FP nia estrutura báziku, maibé detallu balu muda ona.**

**Husi 2005 ba 2020:**  
 \$23.1 bn reseita mina  
 +\$ 8.4 bn retornu husi investimentu  
**-\$12.5 bn levantamentu**  
**\$19.0 bn balansu**

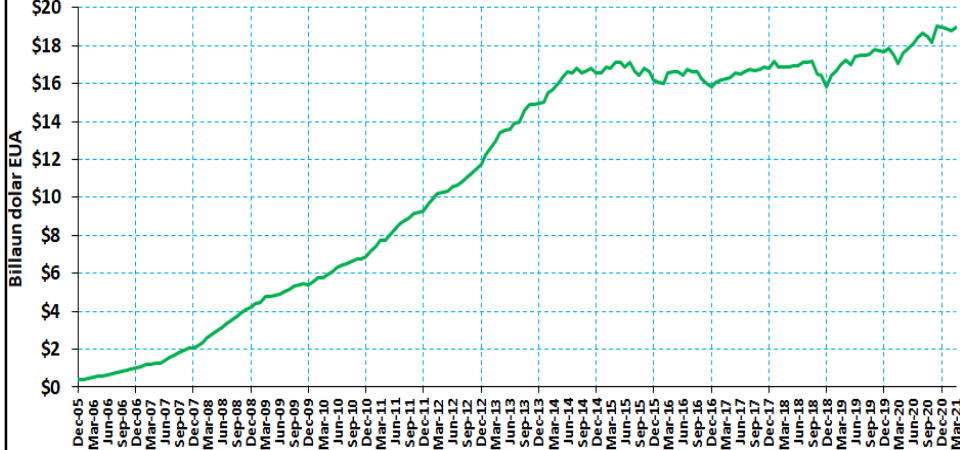
### Timor-Leste's Petroleum Revenue Streams

Totals for 2012. Millions of U.S. dollars, estimates in *italics>.*



**Ita la depende ba mina ona – agora ita depende ba osan ne'ebé rai hela iha FP.**

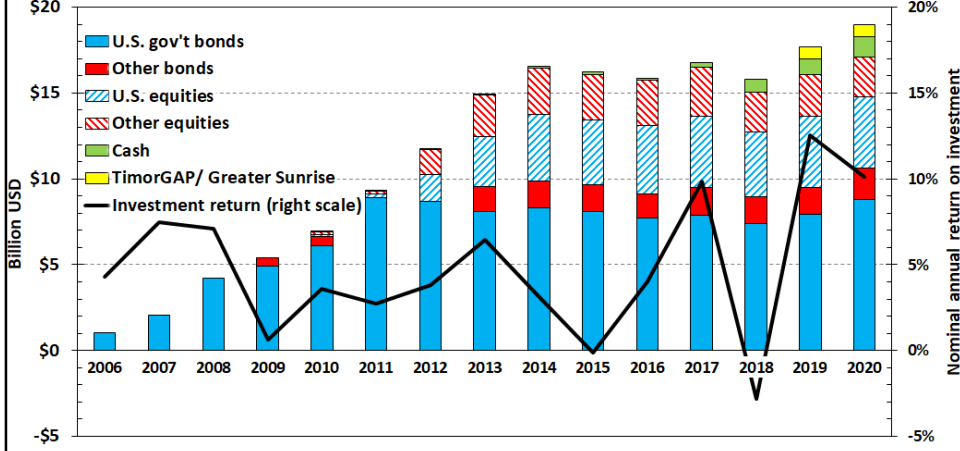
**Balansu iha Fundu Petroliferu Timor-Leste nian**



Grafiku husi La'o Hamutuk bazeia relatoriu mensal husi Banku Sentral TL nian. Abril 2021

**PF manán osan husi investimentu, maibé mós bele lakon.**

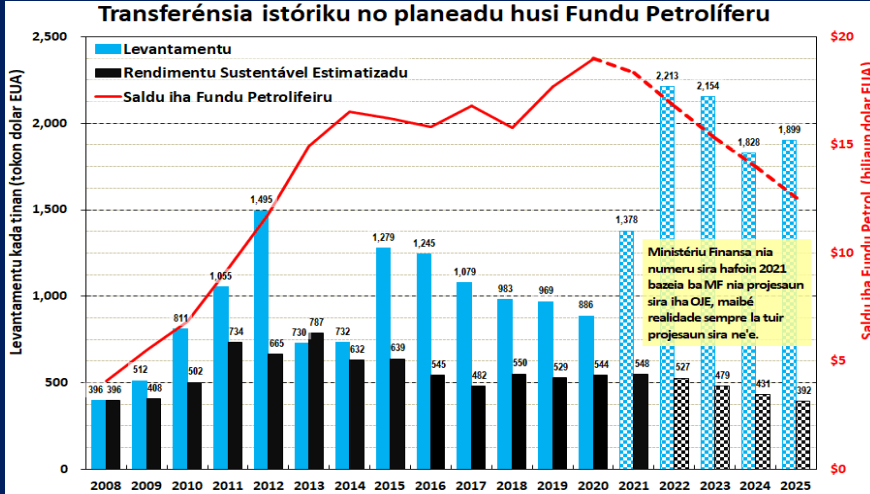
**How the Petroleum Fund is Invested**



Graph by La'o Hamutuk based on information BCTL Petroleum Fund quarterly and annual reports. February 2021



## Ita gasta ona saida mak ita iha



**Fundu Petrolíferu atinje \$17 biliaun iha tinan 2015 nia klaran, no tuun ba menus \$16 biliaun iha tinan 2018, valor ne'ebé mak ki'ik liu durante tinan 5 nia laran. Balansu ne'e sa'e iha 2019 no 2020, maibé ba futuru seidauk klaru.**

## Governu nia senáriu "boot" husi tinan kotuk ki'ik kompara ho OJE atuál.



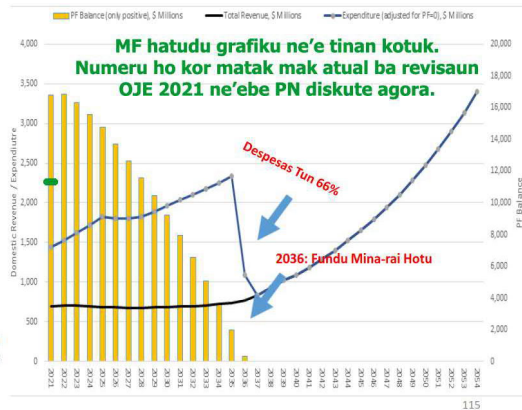
### SENARIUS FISKALIS BA OJE 2021

#### SENARIU 3 – BOOT 2: Programa + Medidas Prinsipais no Legais (\$1,782.9m)



Kategoria	OJE 2021 (\$)	OR 2021
SV	235.00	229.67
BS	524.00	573.42
KM	31.10	55.05
KD	528.00	278.44
TP	376.00	715.96
<b>Total (la inklui emprestimus)</b>	<b>1,694.1</b>	<b>1,852.5</b>
Emprest.	80.20	80.20
DSB	8.6	8.6
Pakote Rekuperasaun Ekonomia	?	304.3
<b>Total (ex, Econ rec)</b>	<b>1,782.9</b>	<b>2,245.6</b>

- Senariu ne'e konsidera despesas regular sira iha kada kategoria hetan kresimentu;
- Akomoda ona medidas prinsipais no legais anuais;
- Konsidera ona parsialmente kustu ba programa hosi LM, IE, SFA no Munisipiu ho baze ba racionalizasaun teknika;
- Konsidera ona despesas ba RAEOA/ZEESM tuir tetu 2020 orijinal;
- Akomoda ona programas prioridades balun tuir tetu 2020 orijinal;
- Konsidera ona empréstimu, DBS no estimasaun balansu despesas fundu COVID-19;
- Senariu ne'e seidauk akomoda pakote rekuperasaun ekonómika (Sei konfirma ho KPPE).





## Doador sira nia suporta agora ladun importante.



## 3. Panorama ekonomia TL nian.

**Dependénsia importaun.**

**Maioria família mak agrikultór sira.**

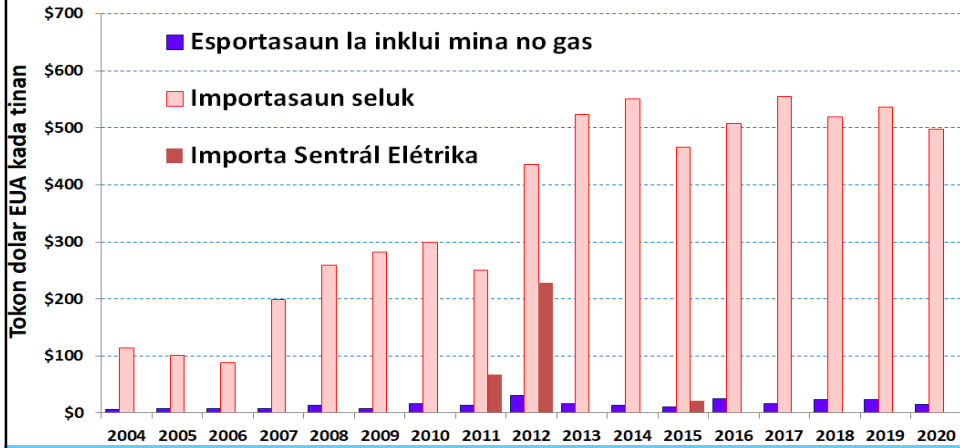
**Dili riku liu munisipiu sira seluk.**

**Populasaun sai, maibé empregu tuun.**

**Setór produtivu mós tuun.**

## Dependénsia ba Importasaun

### Komérsiu Internasionál Sasan iha Timor-Leste

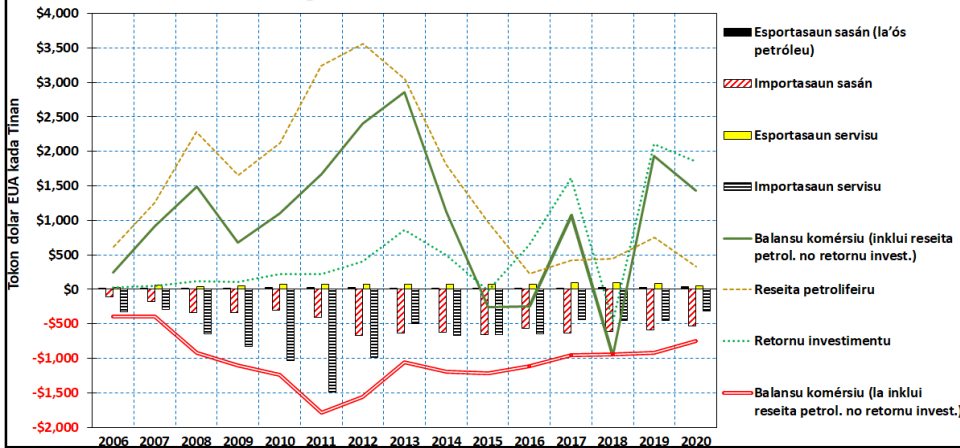


**Gráfiuku ne'e hatudu komérsiu legál ba sasán de'it. 3/4 hasai husi doadór no 2/3 husi estadu nia despeza sai ba rai li'ur.**

### Osan sai barak liu kompara ho osan tama.

	<b>Komérsiu 2020: Servisu</b>	<b>Sasán (non-oil)</b>	<b>Total</b>
Importasaun	tokon \$315	tokon \$527	tokon \$842
Esportasaun	tokon \$ 46	tokon \$ 45	tokon \$ 91
<b>Defisit</b>	<b>tokon -\$269</b>	<b>tokon -\$482</b>	<b>tokon -\$751</b>

### Balansu Pagamentu Esternu Timor-Leste nian

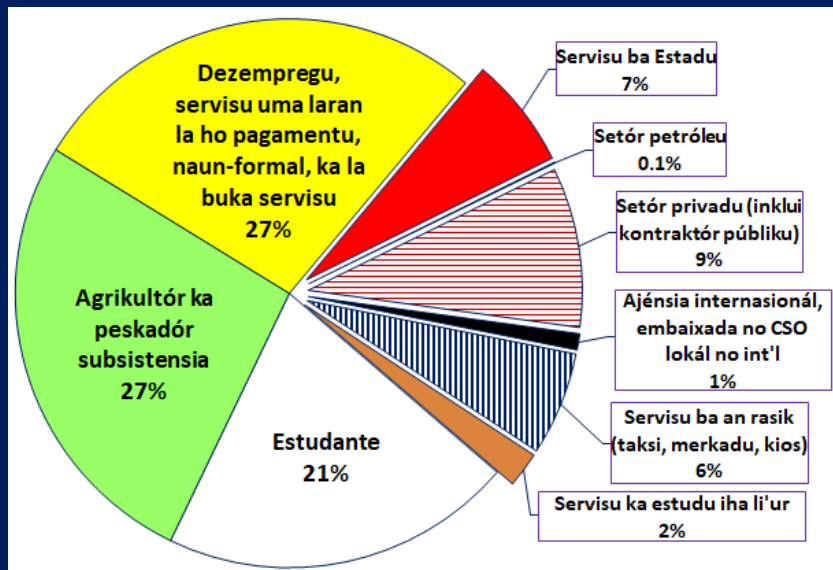


## Populasaun barak liu mak hela iha area rural hanesan agrikultór subsistente.



Agrikultura sei hetan menus 1% husi despeza estadu iha 2021, maske setór ne'e mak fonte moris nian ba 65% povu TL.

## Saida mak Timoroan 820,000 ho idade 15-64 nia servisu?



## Dili diferente tebes kompara ho munisipiu seluk.

**Table 2.6 Wealth quintiles**

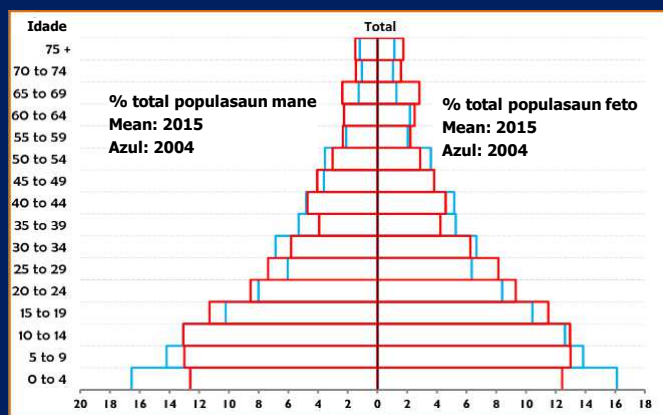
Percent distribution of the de jure population by wealth quintiles, and the Gini Coefficient, according to residence and municipality, Timor-Leste DHS 2016

Residence/region	Wealth quintile					Total	Number of persons	Gini coefficient
	Pobreza		Middle	Fourth	Highest			
	Lowest	Second						
<b>Residence</b>								
Urban	1.5	3.4	8.8	30.0	56.2	100.0	16,539	0.11
Rural	26.9	26.2	24.2	16.3	6.4	100.0	44,030	0.25
<b>Municipality</b>								
Aileu	16.6	33.3	27.2	17.1	5.9	100.0	2,357	0.21
Ainaro	35.0	27.1	20.8	13.5	3.7	100.0	3,076	0.15
Baucau	20.0	22.4	22.5	22.6	12.6	100.0	6,994	0.23
Bobonaro	15.6	22.0	29.8	22.5	10.0	100.0	4,797	0.23
Covalima	24.4	18.9	24.8	20.8	11.1	100.0	3,569	0.15
Dili	2.9	4.4	6.8	26.0	59.8	100.0	12,625	0.18
Ermera	30.0	32.8	21.9	11.2	4.1	100.0	5,818	0.27
Lautem	15.1	20.9	25.4	26.5	12.2	100.0	3,374	0.21
Liquiça	17.0	28.3	24.1	18.8	11.9	100.0	3,966	0.28
Manatuto	18.7	19.3	25.5	21.7	14.9	100.0	2,795	0.26
Manufahi	24.2	22.7	20.2	21.6	11.3	100.0	3,201	0.27
SAR of Oecussi	45.7	18.7	16.8	10.6	8.2	100.0	3,985	0.25
Viqueque	30.3	22.0	24.3	15.0	8.3	100.0	4,012	0.27
Total	20.0	20.0	20.0	20.0	20.0	100.0	60,569	0.16

**60% husi populasau Dili inklui iha 20% ema Timor ne'ebé riku liu, no 7% mak moris iha liña kiak nia okos.**

**Liu maioria husi família ne'ebé hela la'ós iha Dili mak moris kiak.**

## Labarik barak mak sei sai joven.



**Timor-Leste nia populasau ho idade servisu aumenta maizumenus 24,000 kada tinan.**

**Iha 2018, total empregu iha setór privadu 53,000, menus 9,200 kompara ho 2014.**

## Oinsá possibilidade iha futuru

**Peskiza Aktividade Emprezarial 2018** husi Diresaun Jeral Estatística RDTL

Table 2.1 Dadus struturais tuir jeografia, empreza produtora la-petrolíferu sira, 2014-2018

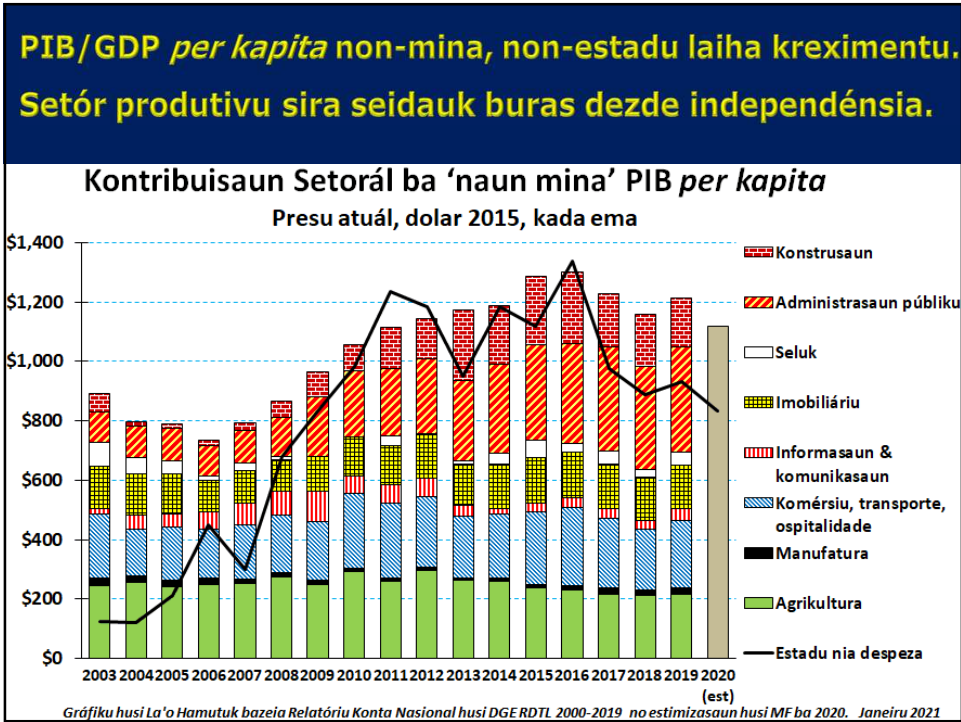
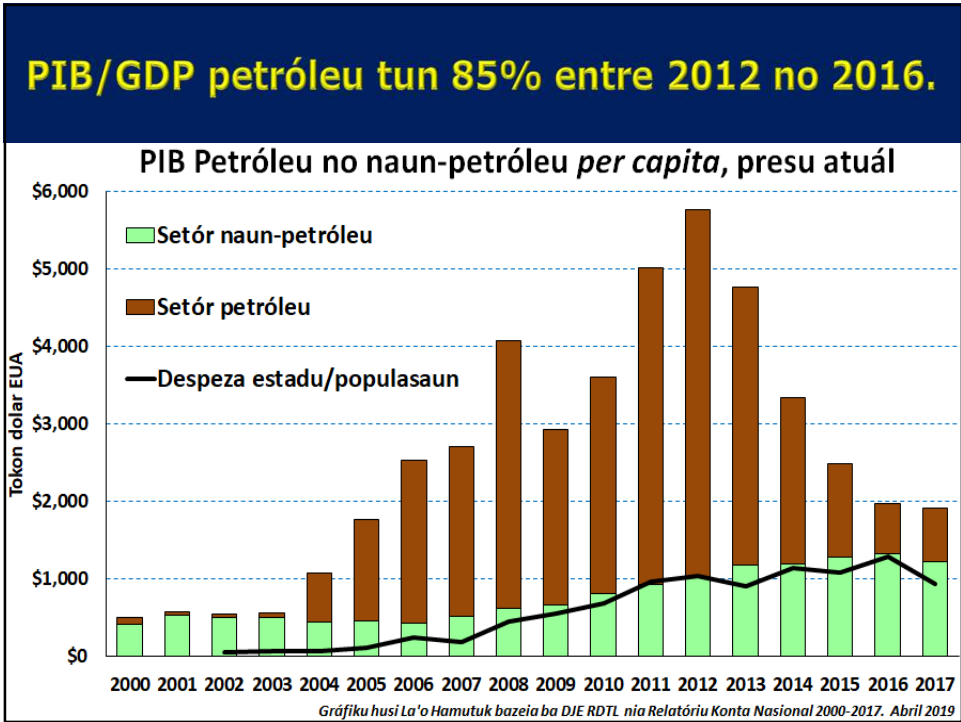
		Total Timor-Leste				
		2014	2015	2016	2017	2018
<b>Empregu</b>						
Mane *	n	47,200	46,200	44,000	43,500	38,700
Feto *	n	15,000	15,100	14,200	14,500	14,200
<b>Total empregu *</b>	<b>n</b>	<b>62,200</b>	<b>61,300</b>	<b>58,200</b>	<b>57,900</b>	<b>53,000</b>
<b>Rendimento</b>						
Rendimento husi venda bens no servisu seluk	\$m	2,000.4	1,999.3	2,049.4	1,918.1	1,840.4
Rendimento sira seluk	\$m	42.9	31.7	33.7	33.2	35.3
<b>Total rendimentu</b>	<b>\$m</b>	<b>2,043.3</b>	<b>2,031.1</b>	<b>2,083.1</b>	<b>1,951.4</b>	<b>1,875.7</b>

**Timor-Leste lakon empregu 9,200 iha setór privadu durante tinan haat. Maizumenus ema 90,000 tan atinje idade servisu durante periodu ne'e. Governu promete atu kria empregu foun 60,000 kada tinan. Planta LNG Beacu sei fó servisu ba traballadór na'in 350 de'it.**

**Ema to'o 20,000 bele tama iha forsa traballu kada tinan, maibé empregu iha setór privadu tun 15% entre tinan 2014 ho 2018. Metade husi populasaun oras ne'e tinan ki'ik liu 20.**

## Númeru empregu husi kada investimentu boot.

Megaprojetu iha prosesu	Númeru empregu permanente
<b>Heineken, Hera</b>	Tuun ona no bele taka. Uluk <b>125</b>
<b>Portu Tibar</b>	promete husi na'in <b>200</b>
<b>TL Cement, Baucau</b>	promete husi na'in <b>700</b>
<b>Pelican Paradise, Tasi Tolu</b>	promete husi na'in <b>1,500</b>
<b>Tasi Mane Projetu, kosta súl</b>	total durante operasaun <b>730</b>
<b>Total</b>	<b>3,255</b> Númeru traballadór foun sira ne'ebé tama iha idade servisu kada fulan rua.



## Timor-Leste nia PIB/GDP (inklui Petróleu) presu-konstante tun no laiha serteza.

Kreximentu real iha PIB total	Data	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
FMI Relat. Artigu IV (2019)	Mai-19					20.9%	0.8%	-4.5%	-8.0%	6.6%	1.3%	-12.3%
RDTL Konta Nasional (2017)	Abr-19	11.5%	5.0%	-11.1%	-25.9%	20.6%	0.7%	-9.2%				
RDTL Konta Nasional (2016)	Jan-18	11.8%	5.0%	-11.0%	-26.0%	20.9%	0.8%					
FMI Relat. Artigu IV (2017)	Dez-17				-26.0%	20.9%	-7.9%	-8.0%	-0.7%	-4.7%	-3.7%	-2.6%
RDTL Konta Nasional (2015)	Abr-17	11.9%	4.8%	-10.9%	-26.0%	20.9%						
RDTL Konta Nasional (2014)	Jun-16	10.6%	1.9%	-12.8%	-27.8%							
FMI Konsult. Artigu IV (2016)	Mai-16		5.3%	-13.9%	-15.8%	-0.6%	-8.8%	-12.9%				
RDTL Konta Nasional (2013)	Jun-15	12.6%	5.2%	-13.9%								
FMI Konsult. Artigu IV (2014)	Out-14	7.9%	-10.4%	-10.7%	-10.2%	10.2%						
FMI Relat. Artigu IV (2013)	Dez-13	7.3%	5.7%	-3.2%	-6.9%							

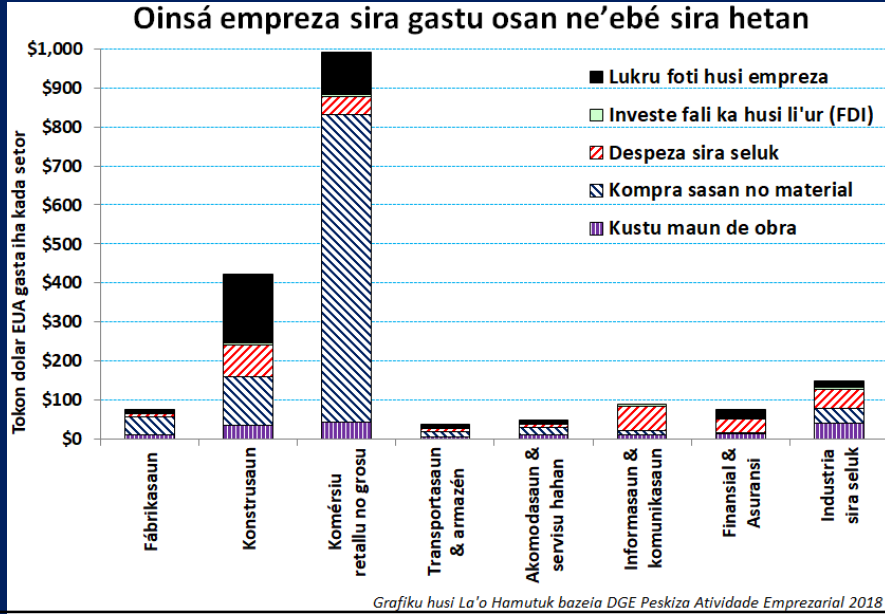
**Total PIB per kapita ki'ik liu kompara ho 2006, molok hetan osan barak husi mina. Populasaun sa'e lalais liu kompara ho ekonomia.**

## Kreximentu PIB naun-mina ho presu konstante la konsistente no la atinje previzaun.

Kreximentu real iha PIB la'ós mina	Data	Anuál 2012-19	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
RDTL OJE 2021 alterasaun	Mar-21				2.1%	4.4%	2.9%	3.4%	-4.1%	-1.1%	1.8%	-7.6%	2.0%
RDTL Konta Nas. 2000-2019	Out-20	1.3%	5.8%	6.0%	2.1%	4.4%	2.9%	3.4%	-4.1%	-1.1%	1.8%		
RDTL OJE 2021	Out-20	1.6%	5.8%	6.0%	2.1%	4.5%	3.1%	3.6%	-3.8%	-0.8%	2.0%	-6.0%	3.9%
RDTL OJE 2020	Set-20	1.6%			2.1%	4.5%	3.1%	3.6%	-3.8%	-0.8%	2.7%	-6.0%	3.2%
BAD Perspektiva Dezenvolvimentu Ázia	Abr-20	2.1%	6.7%	5.7%	2.4%	4.7%	3.5%	5.1%	-3.8%	-0.6%	3.4%	-2.0%	4.0%
BM Relatóriu Ekonómiku TL	Dez-19	2.1%				4.7%	3.5%	5.1%	-3.5%	-1.1%	4.1%	4.6%	4.9%
RDTL Konta Nas. 2000-2018	Dez-19	1.4%	5.8%	6.0%	2.1%	4.5%	3.1%	3.6%	-3.8%	-0.8%			
BAD Perspektiva Dezenvolvimentu Ázia	Abr-19	2.3%	6.7%	5.7%	2.4%	4.7%	3.5%	5.1%	-3.5%	-0.5%	4.8%	5.4%	
BM Atualizasaun Ekonómiku Ázia Leste-Pasífiku	Out-18	2.1%	7.7%	5.5%	2.5%	4.1%	4.0%	5.3%	-4.7%	0.8%	3.3%	4.9%	
RDTL OJE 2018	Ago-18	2.2%	7.7%	5.5%	2.5%	4.1%	4.0%	5.3%	-5.3%	0.6%	4.5%	3.7%	4.8%
BM Atualizasaun Ekonómiku Ázia Leste-Pasífiku	Abr-18	2.9%	7.7%	5.5%	2.5%	4.1%	4.0%	5.3%	-1.8%	2.2%	4.2%	4.0%	
FMI Konsultasaun Art. IV (2017)	Dez-17	4.3%	7.9%	5.0%	2.7%	4.3%	4.0%	5.5%	3.0%	5.0%	5.7%	5.5%	5.5%



## Empreza sira la investe iha sira-nia an.



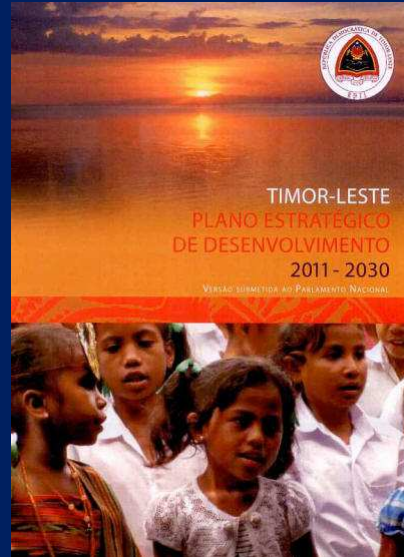
### 3. Mehi la realístiku

**Planu atuál sira ba  
dezenvolvimentu sei la hadi'ak  
ema nia moris ho sustentável.**

**Sira depende ba gás hosi Greater  
Sunrise, ne'ebé limitadu no iha  
posibilidade sei la mai iha rai ka  
kofre Timor-Leste nian.**

## Planu Estratéjiku Dezenvolvimentu

- Fó sai iha 2011, ho esperansa atu halo Timor-Leste sai Nasaun ho Rendimentu Médiu Altu iha 2030.
- Ne'e vizaun no mehi ida, la'ós planu ne'ebé realístiku.
- Foka liu ba iha dezenvolvimentu infrastrutura fíziku, la'ós dezenvolvimentu sustentável no dezenvolvimentu umanu.
- Sei prezisa gastu ne'ebé boot liu fali Timor-Leste nia kapasidade.
- Promesa sira atu halo revizaun (ba planu ne'e) seidak realiza to'o agora.



## Problema sira ho projetu Tasi Mane

- Hanaruk Timor-Leste nia dependénsia ba mina no gás.
- Konseitu no planu sira ne'ebé la sériu no hamosu duvida; iha probabilidade uitoan liu katak nia sei fó fila retornu ne'ebé razoavel hosi investimentu ne'e.
- Ignora dezenvolvimentu sustentável (agrikultura, turizmu, indústriia ki'ik, nsst), hatudu ezemplu atrativu no hakarak ba liu petróleu.
- Despeza biliaun barak ne'e sei maioria ba hotu kompañia estranjeiru sira, kuaze la fó buat ida ba vida-moris ka sub-kontratadu lokál sira. Indústriia petróleu kria servisu ne'ebé uitoan liu kompara ho opsau sira seluk.
- Sei hamosu konfliktu sosiál, okupa rai, dezloka populasaun, estraga liu tan kondisaun saúde no destroi no fó ameasa meu ambiente.
- Projeksaun kustu sira ne'e la inklui 90% hosi obrigasaun sira investimentu nian.
- Kondisaun ekonomia no folin mina ohin loron nian, projetu ne'e finansialmente la viavel.
- Ita bele barani, maibé ita mós tenke matenek.

**Governu halo ona promesa barak ne'ebé mak la realístiku kona-ba reseita, fahe lukru sira, empregu no benefisiu sira seluk tan.**

## Saida mak total kustu loloos Tasi Mane nian?

(Ida ne'e estimasaun ba despeza kapitál de'it, la inklui kustu operasionál. Barak liu mak la fó sai iha previzaun orsamentu estadu.)

Osan gastu ona, iha orsamentu no sei prezisa atu hari'i Projetu Tasi Mane (tokon dolar EUA)

Komponente	Fatin	Estatus	Gastu to'o 2020	Alokasaun 2021	Alokasaun 2022-2025	Kustu total kapitál estimadu	Persen-tajen iha OJE
Aeroportu	Suai	Harii tiha ona	77	3	9	100	90%
Baze Fornesimentu	Suai	Hein aprovizionamentu	51	5	745	900	89%
Auto-estrada	Suai-Fatukai	Harii tiha ona	306	3	4	340	92%
Auto-estrada	Fatukai-Beaçu	Seidauk hahú	3	1	22	1,320	2%
Aeroportu	Viqueque	Seidauk hahú	-	-	-	75	0%
Refinaria no pipa mina	Betano	Seidauk dezeñu	5	-	6	1,500	1%
Pipa gas, planta LNG no portu	Sunrise-Beaçu	Seidauk dezeñu	25	-	21	6,000	1%
Hola partisipasaun 57% iha Konsorsiu Greater Sunrise	Tasi laran	Empresta husi Fundu Petrolifeiru direktamente	650	-	-	650	100%
Funan ba emprestimu atu hola partisipasaun iha GS	Tasi laran	Aumenta iha Fundu Petrolifeiru	51	32	141	512	44%
57% husi investimentu kapitál iha Sunrise upstream	Tasi laran		-	-	-	6,840	0%
Kustu administrasaun no sst.	Dili		58	68	-	500	25%
<b>TOTAL</b>			<b>1,226</b>	<b>112</b>	<b>948</b>	<b>18,737</b>	<b>12%</b>

abela husi La'o Hamutuk bazeia ba Livru Orsamentál, Conta Jeral Estadu, proposta husi TimorGAP, Portal Transparénsia, no ami nia estimasaun. Marsu 2021

## Saida mak sai dalan alternativu?

- Investe iha rekursu umanu: edukasaun, saúde no nutrisaun. Sira ne'e mak nesésáriu ba buat hotu.
- Harii infrastrutura ne'ebé fornese nesésidade povu nian: estrada rurais, bee mós, eskola no klínika lokál, eletrisidade renovavel no desentralizadu.
- Planu no dezeñu ba mudansa iha klima no dezastre "naturais"
- Labele haluha ema sira ne'ebé moris la tama iha ekonomia formál.
- Haforsa setór sira ne'ebé uza riku soin Timor-Leste nian: agríkola, turizmu bazeia iha comunidade sira, indústrria kí'ik ne'ebé prodús sasán ne'ebé bele uza iha TL.
- Tuir polítika sira bazeia ba evidénsia no analiza imparsiál, la'ós fantasia, interese partidáriu, ka mehi.

## Obrigadu

Ita bele hetan informasaun barak no atualizadu liu iha:

- La'o Hamutuk nia website  
<http://www.laohamutuk.org>
- La'o Hamutuk nia blog  
<http://laohamutuk.blogspot.com/>


Institutu Timor-Leste ba Monitor no Analiza Dezenvolvimentu  
Rua D. Alberto Ricardo, Bebora, Dili, Timor-Leste  
P.O. Box 340, Dili, Timor-Leste  
Telefone: +670 7723 4330 (mobile) +670 3321040 (landline)  
Email: [laohamutuk@gmail.com](mailto:laohamutuk@gmail.com)

## Timor-Leste nia futuru – jerasaun foun.



# Uza : [www.laohamutuk.org](http://www.laohamutuk.org)

**Instituto ba Analiza no Monitor Dezenvolvimento iha Timor-Leste**  
**Timor-Leste Institute for Development Monitoring and Analysis**  
**Institut Pertantauan dan Analisis Pembangunan Timor-Leste**



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**La'o Hamutuk**  
 PO Box 340, Dili, Timor-Leste  
 Wired phone: +670-3321040, Mobile: +670-77234330 [laohamutuk@gmail.com](mailto:laohamutuk@gmail.com)

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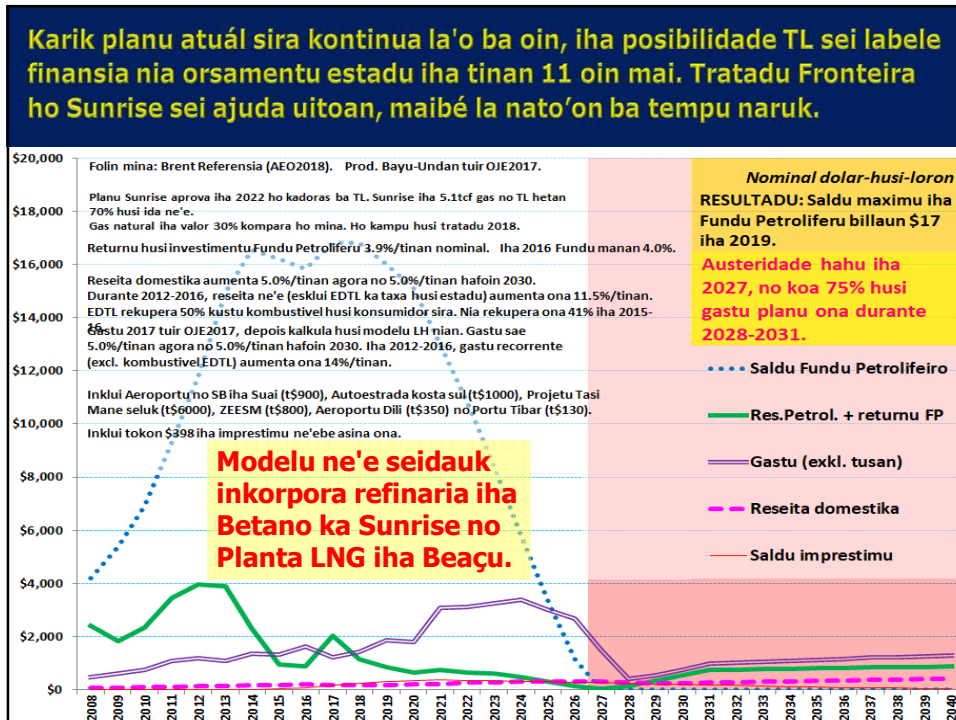
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- Dokumentu husi UNMIT no IHI (12/12)
- TL lama iha divoz (3/12)
- Lai Ambiental (8/18)
- Planu Estratejika Dezenvolvimentu (7/11)
- Projetu mina kilan (8/16)

**Recent Postings**

- Feb 2021: [Rights and Sustainability: LH briefing on key issues facing TL](#), 18 MB Powerpoint or 8 MB PDF
- Feb 2021: [Presentation Timor-Leste Economic Survey 2021](#) (also [PDE notes](#) and [video](#))
- Feb 2021: [State of Emergency / Estado Emerjénzia](#) with many documents, including [LH letter to Prime Minister \(Tetum\)](#) about the Economic Recovery Plan
- Jan 2021: [State budget for 2021](#), including proposed budget law, books, presentations, and [LH submission to Parliament](#) (also [Tetum](#))
- Jan 2021: [U.S. Millennium Challenge Corporation \(MCC\) to re-engage in Timor-Leste](#)
- Jan 2021: [Bobby Bove: Convict, Advisor and Fraud](#) (also [Tetum](#)) sentenced to six years in prison; loses appeal; loses lawsuit to overturn sentence; release from prison after serving sentence
- Dec 2020: [Bulletin LH \(Tetum\)](#) ho artigo kona-ba Impaktu Covid-19, Rekursu no Poténsia Agrikultura nian, See [Moos Hansan Diweto Ema Hotu Nian](#); Konsultasaun ba [Projetu Dili Drainajen](#); [Prestiza atu Had'ak Transparénsia Orsamental](#)
- Dec 2020: [State budget for 2020](#), including three proposals, duodecimal regime, documents, presentations, graphs, [LH submissions to Parliament](#) (also [Tetum](#)) and enacted budget law
- Dec 2020: [Australia Prosecutes Bernard Collaery and Witness K](#) chronology and links
- Nov 2020 blog: [Rezultadu husi Global Hunger Index 2020 kredível ka lae? / How credible is the 2020 Global Hunger Index?](#)

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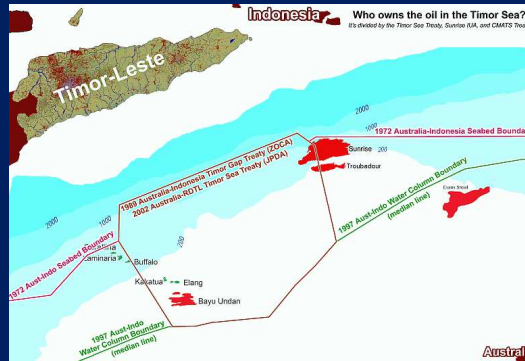
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## Sunrise no disputa fronteira marítima nian

- Kompañia mina Australia nian hahú halo peskiza iha area Sunrise iha inísiu 1970s, depois Australia ho Indonézia fahe ita nia rekursu marítima sei partisipasaun husi Portugal. Iha tinan 1989, sira taka "Timor Gap" hodi fahe rekursu ne'ebé sira okupa ho ilegál iha Area Desenvolvimentu Konjunta.
- Tratadu CMATS iha 2006 bandu diskusaun kona-ba fronteira marítima ba tinan 50. Nia fahe reseita 'upstream' husi Sunrise 50-50.
- Australia halo tuir liu nia karakteren ba mina, duke respeitu ba nia viziñu ne'ebé soberanu ka lei internasionál.
- Bazeia ba UNCLOS , TL mak nain ba kampu mina sira iha liña media nia norte, no fronteira lateral sira tenke muda sai.
- Iha Janeiru 2017, Australia simu Timor-Leste's nia pedidu hodi kansela Tratadu CMATS. Governu rua asina tratadu foun ba fronteira permanente iha Marsu 2018 no hahú aplika iha Agostu 2019.



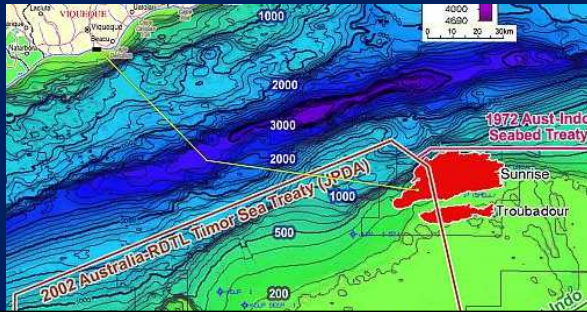
## Konspira hodi na'ok Timor nia rikeza

**1989: Ministru Negósiu Estranjeiru rua, Gareth Evans ho Ali Alatas celebra asinatura Tratadu Timor Gap iha aviaun ne'ebé semo iha Tasi Timor nia leten.**

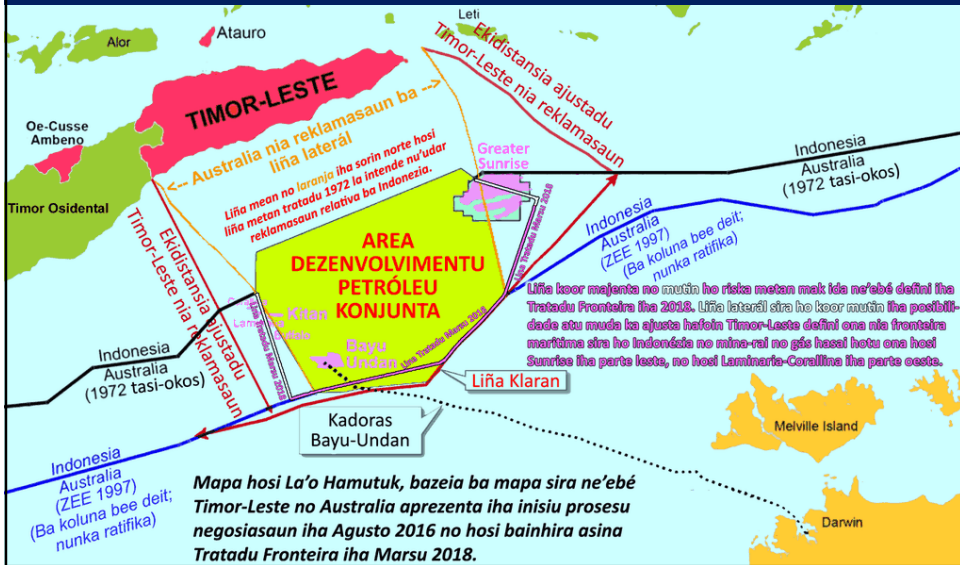


## Greater Sunrise seidauk iha dalan

- Projetu labele la'o ba oin tanba Timor-Leste ho kompañia sira la konkorda kona-ba oinsá atu dezenvolve kampu ne'e.
- Molok 2018, Woodside ho ninia parseiru Shell, ConocoPhillips ho Osaka Gas fiar katak uza kadoras ba Planta LNG iha Darwin (ne'ebé uza ba Bayu-Undan) sei fó lukru boot liu.
- Timor-Leste hakarak kadoras husi Sunrise to'o iha Beaçu, atu hetan reseita taxa boot liu no mós atu sai baze ba projetu Tasi Mane.
- Bazeia ba kontratu ho tratadu sira, kompañia sira mak propoin planu dezenvolvimentu, maibé governu rua mós tenke aprova.
- Tanba Australia halo espionajen, TL obriga Australia hodi negosia Tratadu Fronteira iha 2018, maibé la hetan konkordánsia kona-ba kadoras atu dada ba ne'ebé.
- Timor-Leste sosa partisipasaun 57% atu bele kontrola desizaun kadoras nian. TL agora buka hela finansiamentu atu dezenvolve projetu ne'e.
- Impaktu lojistiku no ekonómiku husi Covid-19 halo kompañia sira iha mundu tomak lakohi investe iha projetu foun sira. Woodside decide katak Sunrise laiha valor iha Juñu 2020.
- Lideransa foun iha setór petróleu iha Timor-Leste sei halo avaliasaun foun.



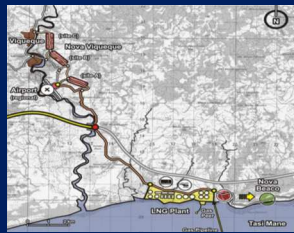
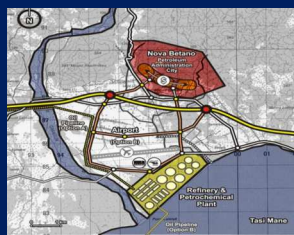
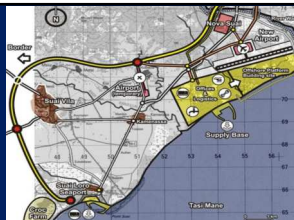
## Australia ho Timor-Leste konkorda ona fronteira marítima no fahe reseita husi Sunrise – maibé seidauk rezolve kestaun kadoras gás ninian.





## Projeto infraestrutura petrolíferu Tasi Mane

- Iha 2010 Timor-Leste hahú hanoin kona-ba korredór petróleu kosta súl.
- Durante 2011-2019 Timor-Leste gasta liu tokon \$500 ba projetu ne'e.
- Iha 2019, Timor-Leste hola partisipasaun ConocoPhillips no Shell nian iha Greater Sunrise ho folin tokon \$650 ... agora tenke selu 57% hosi kustu dezvoltimentu offshore (tasi laran) nian.
- Kustu total projetu sira bele liu biliar \$20 (sei liu tan ida ne'e se Timor-Leste selu rasik ba refinaria, pipa no planta LNG).
- Seidauk iha investidor ida ne'ebé hatudu sira nia interese, molok ka hafoin Covid-19.



## Projeto Tasi Mane inklui

- **Suai:** Area ba baze de fornecedor, Zona industrial sira, Nova Suai, Aeroportu Suai, Fazenda lafaek nian
- **Betano:** Area petrokimika no refinaria, Sidade petrolíferu (Nova Betano), kadoras mina hosi no ba Suai
- **Beaçu:** Planta LNG, Nova Beacu, Nova Viqueque, Aeroportu Viqueque
- **Auto-estrada** hosi Suai ba Beaçu

## Akizisaun Greater Sunrise

- Timor-Leste ‘empresta’ token \$650 husi Fundu Petrolíferu hodi selu ba 57% hosi Konsorsiu Sunrise.
- Parseiru sira seluk lakohi harii kadoras ba Beaçu no planta LNG iha ne’ebá, maibé iha possibilidade sira sei tuir de’it bainhira Timor-Leste mak selu ba kustu hotu.
- Ida ne’e sei han biliaun dolar barak no hamenus Timor-Leste nia direitu ba reseita *upstream* (fokit) hosi 80% ba 70%.
- Benefísiu sira ne’ebé atu hetan bele sai iluzaun ka mehi de’it, no seidak iha analiza kompletu no independente kona-ba kustu no risku ambientál, sosiál no finanseiru.
- Akordu sira ne’e hala’o ho menus akontabilidade no supervizaun ne’ebé fraku.
- Ema uitoan de’it mak hanoin kona-ba kustu oportunidade ne’ebé lakon, dezvoltimentu ne’ebé realístiku no sustentável liu, ka osan sira ne’e bele uza atu halo saida tan.
- Ema sira ne’ebé foin hetan knaar atu jere setór petrolíferu bele re-avalia projetu ne’e.



## Zona Merkadu Espesiál iha Oe-Cusse



- Iha 2014-19, RDTL gasta token \$647 ba ZEESM la ho akontabilidade. Oe-Cusse iha 6% hosi total populasaun Timor-Leste nian.
- Saida mak Oe-Cusse nia vantajen kompetitivu sira?
- ZEESM bele justifika ka lae investimentu biliaun \$4 ne'e?

**Se mak hetan benefísiu: populasaun Oe-Cusse ka lideransa sira?**

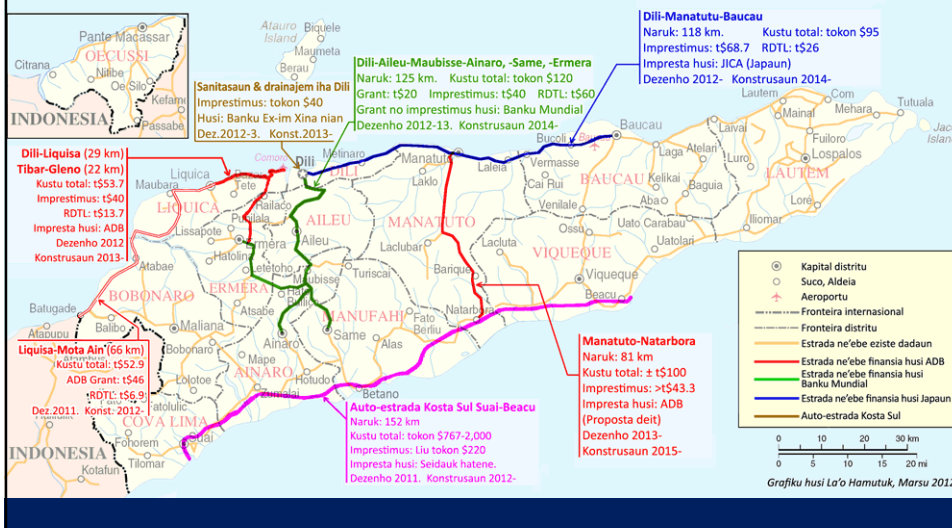
## Timor-Leste iha tusan ona.

- Lei sira iha 2009 fó dalan atu hetan deve husi li'ur.
- Dezde 2012, TL asina ona\* kontratu atu empresta token \$475:
  - Token \$272 husi Asian Development Bank (BAD) ba estrada sira
  - Token \$134 husi World Bank (BM) ba estrada sira
  - Token \$ 69 husi Japan (JICA) ba estrada sira
- Husi kontratu ida ne'e, token \$223 gasta daudauk ona.
- Planu deve iha future seidak klaru, maibé Sunrise no Projeitu Tasi Mane bele hetan finansiamentu husi empréstimu too dolar biliaun balun.
- OJE 2021 sei autoriza kontratu empréstimu foun token \$420.
- Husi 2023, Timor-Leste sei selu fali token \$27 kada tinan ba servisu empréstimu sira, ne'ebé sei sa'e ba token \$56 kada tinan hafoin kontratu empréstimu foun asina no osan empresta ona.

\*La inklui token \$50 husi Xina ne'ebé kansela tiha husi Kamara Kontas.

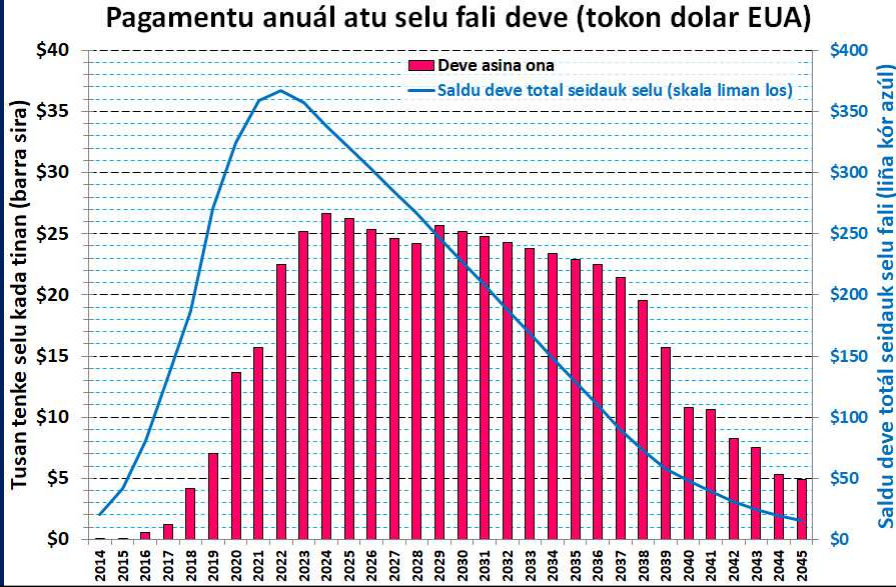
## Empréstimu sira uza ona atu konstrui estrada sira.

### Projeitu sira ne'ebe financia ho osan imprestimus husi 2012-2016

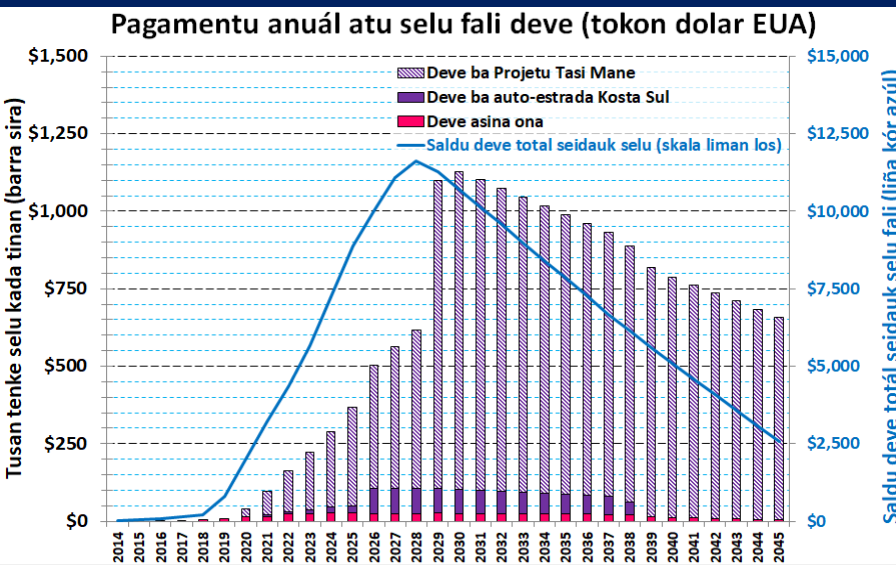


## Deve sira sei tenke selu fila fali.

Gráfiku ne'e inklui de'it deve ne'ebé asina ona.



## Deve ba Tasi Mane sei kusta too biliarun ida kada tinan.





## Importante atu konsidera:



- SDP nia implementasaun sei preziza empresta biliaun barak, karik ho taxa komersiál.
- Maski iha taxa konsesional, selu fila-fali tusan hamenus riku soin sira iha Fundu Petrolíferu.
- TL nia rezerva mina ho gas limitadu, la renovavel, ho 95% maran tiha ona. Projetu balu imagina ba futuru bele la dezenvolve.
- TL sei tenke fó prioridade ba selu tusan fila-fali, la'ós uza osan atu responde ba povu nia nesidade sira ka dezenvolve setór seluk.
- Ita sei husik hela tusan ba ita nia oan no bei-oan sira, depois de posu mina sira maran ona.