

## Enkontru Públiku

### Efeitu hosi Projetu Tasi Mane ba ekonomia no povu nia moris

Juvinal Dias  
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## Projetu infrastrutura Petróleu Tasi Mane

- TL hahú servisu ba korredór petróleu Tasi Mane iha 2010.
- Inklui iha Planu Estratéjiku Dezenvolvimentu Nasionál 2010-2030.
- Tuir MPRM, kustu projetu ne'e sei to biliaun \$14-\$15.

*"Atu lori dezenvolvimentu petróleu ba rai maran atu fornese lukru ekonómiku direta hosi atividade indústria petrolíferu ..."*  
 (PEDN)



## Impaktu TMP ba sosio-ambiental

- Foti rai agrikultór barak
- Foti risku ba produsaun agríkola
- Ema barak lakon nia rai, muda fonte rendimentu
- Maizumenus sei foti rai hektare 230 ba refinaria
- Hektare 1300 ba SSB no Nova Suai
- Poténsia atu hasoru rezisténsia comunidade nian
- Poluisaun bee, rai, tasi no anin
- Ameasa hodi halakon biodiversidade (TL parte hosi Rejiaun Wallacea iha Asia Sudeste)
- Halakon valor kulturál comunidade nian

## Komponente PTM



## Suai Supply Base

- RDTL foin asina kontratu \$719,212,000 ho Hyundai Engineering and Construction atu harii SSB.
- Montante ida ne'e barak liu duke despeza Timor-Leste nian ba edukasaun husi 2002 ba ohin loron.
- Iha mós kontratu balu tan, ho montante liu token \$50.

**SUAI SUPPLY BASE (SSB) CONTRACT SIGNED** *From TimorGAP Newsletter, September 2015*

TIMOR GAP has been mandated to, on behalf of the Ministry of Petroleum and Mineral Resources / Government, manage and administer the day to day activities for the implementation of three clusters of development situated along 355 km of Timor-Leste's southern coast. These projects are called "Tasi Mane" and includes three clusters: Suai Supply Base, Betano Refinery, Beapo LNG Plant, plus additional infrastructures, such as Airport, Highway and New Cities to resettle the affected Communities.

On 23<sup>rd</sup> June 2015 the Korea's Hyundai Engineering & Construction was awarded with \$719 million equivalent contract by Timor-Leste's Ministry of Petroleum and Minerals Resources (MPRM) for the design build of the Suai Supply Base Project located on the southern coast of Timor-Leste.

**HYUNDAI** Hyundai Engineering and Construction Co., Ltd is a major construction company in South Korea which has carried out projects not only in Korea but around the world.

The National Oil Company (TIMOR GAP, E.P.) through Exploration & Production and Supply Base Unit conducted the SSB Contract Signing Ceremony on 27th of August, 2015. The Signing Ceremony held in the Conference Room in the Office of H.E. Minister of Mentor, Planning and Strategic Investment of RDTL, Mr. Xanana Gusmão, started with a brief introduction of the Process of Procurement by Mr. Aniceto Guterres, Director of NPC, followed by a brief introduction of the Project by Mr. Vicente Lacerda, Director of E&P and SB Unit of TIMOR GAP.

The Ceremony counts with the participation of H.E. Minister of MPIE, Mr. Xanana Gusmão, H.E. Minister of MPRM, Mr. Alfredo Pires, President & CEO of Hyundai Engineering & Construction (HDEC) and his Team, Mr. Soo Hyun Jung, President & CEO of TIMOR GAP, Mr. Francisco Monteiro, E&P and SB Unit's Director Mr. Vicente Lacerda, H.E. Korean Ambassador Mr. Won Gil, State Director of the OCR, Deputy President of the Builders' Confédération Portugaise and several other guests.

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## Governu Korea blacklist kompañia ida ne'e.

**KOREA JOONGANG DAILY**

### Agency bans 21 builders from business with gov't

Apr 26, 2014

The Public Procurement Service (PPS) yesterday banned Korea's largest builder, Hyundai Engineering and Construction, and 20 other builders from receiving government contracts as punishment for collusion.

**Collusion penalties**

• *Two-year bans*

Daelim Industrial, Daewoo E&C, Doosan E&C, GS E&C, Hanyang Corp., Hyundai Development Company, Hyundai E&C, Kolon Global,

## Kontratu sira asina ona: token \$837

Award date	Vendor name	Procurement document (follow links to get vendor or contract details from the Procurement Portal)	Award amount
21-May-2010	TOKE OIL & GAS SA	Offshore Geovial Investigation and Bathymetric Survey Services in Three (3) Inshore Areas at Suai and Beava	\$1,289,141
19-Nov-2010	TOKE OIL & GAS SA	Contract No. STA-SE/09-001/2010 Provision of Metocean and Ground Investigation Survey nearshore and offshore Timor-Leste	\$6,839,517
16-Dec-2010	PT. BENKULLEN ATTRA CEMERLANG	Spatial design planning for southern coast of Timor-Leste (Districts of Suai, Manufahi and Viqueque) (No. 005/MPS/MD/SDPS/0/2010)	\$1,181,046
16-Dec-2010	PT. DSI MANANIR SEHAHTERA	Spatial Design Planning for Southern Coast of Timor-Leste, (Districts of Suai, Manufahi and Viqueque) (No. 004/MPS/MD/SDPS/0/2010)	\$900,000
17-Dec-2010	EASTLOG HOLDING PTE LTD (Incorporated on the portal as Timor-Leste's embassy in China)	Provision of the Commercial and Financial Feasibility Study, Detail Design with complete Engineering of Suai SUPPLY (No. 007-MPS/08/2010/2010) See Government Resolution No. 26/2011 (Also Portuguese) later appointing Eastlog as Supply Base Technical Consultant.	\$1,500,000
22-Dec-2010	EASTLOG HOLDING PTE LTD	Provision of the commercial and financial feasibility study, detail design with complete engineering of Suai Supply Base (Contract no. 007-MPS/08/2010/2010)	\$1,900,000
17-Nov-2011	WORLEYPARSONS PTE LIMITED	Environmental Impact Assessment/Study (EIA) Study on Tasi Mane (Consultant for Suai, Betano, Same, and Beapo - Viqueque) (Contract No. RDTL-12000011)	\$1,079,876
10-Jan-2013 (amended 9-May-2013)	EASTLOG HOLDING PTE LTD	Consultancy services for the preparation and execution of an international public tender aimed at selecting a qualified Design and Build Contractor for the Suai Supply Base Project and subsequent supervision of the Project's construction phase (Contract No. 01/MPRM/1/2011)	\$6,958,348
8-Nov-2013	PT. WASKITA KARYA (PERSERO)	Upgrading Suai Airport (ICR/035/10AP-13)	\$67,681,130
2-Jul-2014	PT. WASKITA KARYA (PERSERO)	Upgrading of the Existing Suai Airport (ICR/035/10AP-2013)	\$19,000,000
28-Sep-2014	Juritera Perunding Zaiba Sdn Bhd	Consulting Services for the Upgrading of the Existing Suai Airport	\$1,000,000
15-Nov-2014	Banco Nacional Comercio de Timor-Leste	Payments for land acquisition for Suai Supply Base, first phase (two contracts)	\$4,674,348
15-Nov-2014	Banco Nacional Comercio de Timor-Leste	Payments for land acquisition for Suai Airport, first phase (three contracts)	\$2,785,108
29-May-2015	Juritera Perunding Zaiba Sdn Bhd	Consulting Services - Construction Supervision for the Upgrading of the Existing Suai Airport	\$78,616
12-Jun-2015	Hyundai Engineering & Construction	Design and Construction of the Suai Supply Base (ICR/012/MPRM-2011)	\$719,212,000
<b>TOTAL</b>			<b>\$836,600,720</b>

## Asumsaun ekonómiku:

- Karik MPRM nia asumsaun loos katak kada tinan BU gasta token \$500 atu hola bens e servisu.
- Metade hosi osan t\$500 sira ne'e ba hotu fornimentu sasán.
- SSB bele halo mark-up 10% ba sasán ne'ebé atu fornese ba atividade petróleu.
- Nune'e: SSB bele hetan t\$25 hosi kada projetu boot hanesan Bayu-Undan ba kada tinan.
- Bainhira 2/3 token \$25 ne'e uza ba taxa, kustu operasionál no personalia, iha de'it token \$8/tinan hosi fornimentu projetu ho nivel hanesan BU nian atu selu kapitál ba investimentu nian no lukru.

## Kontinuasaun

- BU bele uza SSB ne'e ba tinan lima tan (maran iha 2020) = token \$40 (Nune'e iha defisit token \$679).
- Bainhira iha kampu foun hanesan BU ne'ebé bele la'o ba tinan 20, SSB hetan de'it token \$160.
- Tanba ne'e, SSB presiza tan kampu maizumenu lima hanesan BU atu bele fó fila osan CAPEX nian.

## Refinaria iha Betano

- TimorGAP hakarak atu harii refinaria ho kapasidade "ki'ik" ne'ebé sei prosesu mina-matak 30,000 barríl kada loron
- Dezeña bazeia ba produsaun Bayu-Undan, maibé agora konsidera Greater Sunrise
- Kustu investimentu: seidauk loos (TG asume iha billaun \$1), La'o Hamutuk nia peskiza hatudu billaun \$2 ka liu.

## Medida merkadu lokál atu konsumu produktu refinaria?

- TL hakarak fan 30% hosi produktu sei ba merkadu lokál no 70% ba merkadu internasionál
- Iha 2015 Governu aloka token \$92 ba kombustivel EDTL
- OJE 2015 aloka token \$12 ba gazolina no solar ba karreta estadu
- Valor kombustivel ne'ebé tama mai TL token \$160 iha 2014

Table 4: Merchandise Import of Major commodities by country of Origin (2013)

HS Code	Goods Description	Country Of Origin	Value (\$US)
27101931	DIESEL	Malaysia	62,678,534
27101931		Taiwan	22,067,945
27101931		Singapore	15,230,379
27101931		HongKong	8,806,133
27101931		Indonesia	5,656,542
<b>Total 27101931</b>			<b>114,439,533</b>

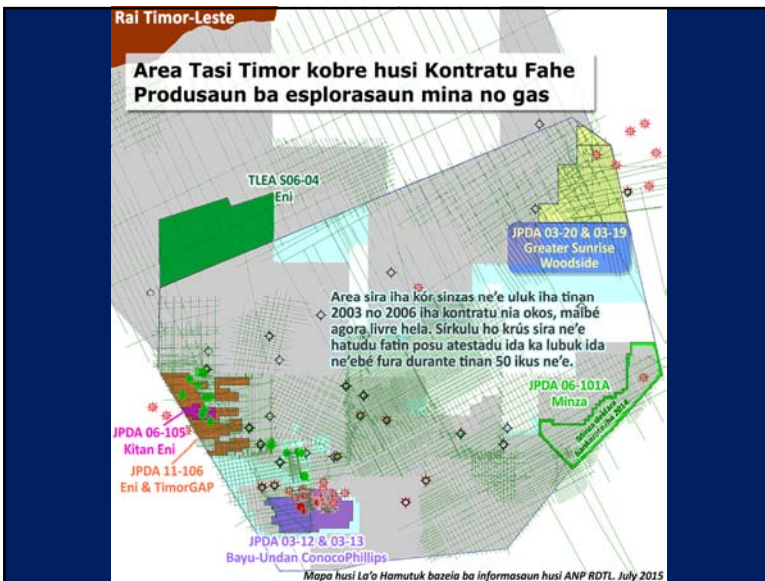
27101131	Motor Spirit	Indonesia	13,720,442
27101131		Taiwan	8,002,652
27101131		Australia	71
<b>Total 27101131</b>			<b>21,723,165</b>

HS Code	Goods Description	Country Of Origin	Value (\$US)
27101921	Jet Fuel	Australia	1,721,298
27101921		Singapore	592,548
27101921		United Kingdom	144,324
27101921		France	1,774
27101921		Indonesia	40
<b>Total 27101921</b>			<b>2,459,985</b>



## Situasaun petróleu iha TL

- Bayu Undan atu maran iha 2020
- Sunrise la serteza
- Bele importa hosi rai li'ur, maibé susar atu kontrola presu
- Liu dékada rua ona, úniku ita hetan de'it Kitan
- Seidauk iha Bidding round foun (menus interese hosi kompañia mina-rai sira)



## Dezafiu atu hetan mina-matak

- Merkadu refinaria ne'e iha kompetisaun ida ne'ebé as. Baibain, refinaria sira ne'ebé iha jestaun di'ak, ho nia fatin estratéjiku, iha merkadu no fornimentu "lojistik" ne'ebé di'ak mak foin bele profitavel.
- Laiha fontes mina-matak foun tan bainhira Bayu-Undan Maran. Greater Sunrise nia "situasaun" la bele sai sasukat.
- TL tenke sosa mina-matak husi projetu sira iha Australia ka fatin seluk.
- Oinsá atu bele hetan? Sira iha refinaria rasik. TL bele kompete?

## TL atu fa'an nia produktu iha ne'ebé? No saida mak nia valor?

Ho PTT - Tailândia

- TL bele uza merkadu PTT nian iha rai sira ne'ebé PTT bele fa'an produktu husi refinaria.
- Valor "fahé lukru" entre PTT no TimorGAP la'o oinsá? Hira mak TimorGAP atu selu ba Timor-Leste?
- Hamenus osan "taxa Profit-oil" ne'ebé TL bele hetan hosi "Sunrise". Simu ho "condensate" ba TG la'ós "cash" ba Estadu nia Fundu Petróliferu.

## La'ós ho PTT

- Tenke kompete ho produktu refinaria sira iha Australia, Indonézia no Singapura.
- Timor-Leste tenke komprende klaru ligasaun husi refinaria ba LNG no SSB.

## Con't

- Maibé dala ruma Timor-Leste la bele hetan "value added" ba nia "condensate" rasik bainhira "refining margin" ki'ik. (Ezemplu, OPEX sa'e ka CAPEX-OPEX kobre hosi OJE.)
- Se depende ba Sunrise, entaun presiza asegura katak TL bele hetan nia parte ho mina-matak.
- Gas no mina husi Sunrise sei ba fatin seluk?

## Asumsaun

- Normálmente rata-rata refining margin hosi refinaria sira ho jestaun di'ak iha mundu barak mak entre \$5-\$6/barril.
- Kustu operasionál no Kustu Kapital ne'ebé boot sei hamenus profitabilidade
- Karik
  - CAPEX refinaria iha biliaun \$1
  - Refinaria prosesu 30,000 bpd ba tinan 30
  - Refining margin \$5/barril
- Entaun presiza \$3/barril atu rekupera investimentu, laho lukru ka funan.
- Karik costa operacional liu \$2/barril, refinaria sei lakon osan.
- Atu hetan margin boot liu, tenke fa'an produktu ho presu aas liu merkadu. Estadu Timor-Leste bele fó subsidiu ka lae?

## Planta LNG iha Beaçu

- Depende tebes ba kadoras Greater Sunrise.
- Woodside deside la fó prioridade ba Sunrise.
- TL fó ona kontratu ba Foster Wheeler Energy hosi U.K. ho montante tokon \$3.8. Kontratu ne'e atu halo dezeñu enjineria preliminarria ba planta LNG iha Beaçu.
- Kustu boot, TL nia kapasidade la suficiente atu finansia rasik. Karik billaun \$9 ka tan.
- Kompañia sira sei interese bainhira iha serteza ba futuru Sunrise no bainhira T-LNG deside ona.

## Problema hosi projetu Tasi Mane

- Halo TL depende maka'as ba setór petróleu no gas, haluha setór desenvolvimentu sustentável.
- Konseitu no planeamentu ne'ebé hamosu hela duvida; sei la fó retornu investimentu ne'ebé razoavel.
- Osan barak halai ba kompañia internasionál no la fó kampu servisu barak.
- Kria konfliktu sosiál, foti rai, evikasaun ba ema, estraga saúde no ameasa ambiente.
- Sei fó naha ba ekonomia rai laran.
- Karik Sunrise la mai Timor-Leste?

## Rekomendasaun LH

- Bele adia projetu Tasi Mane to iha garantia katak kadoras Sunrise mai TL.
- Lalika kontinua TMP to ita deskobre kampu mina-rai foun ho valor komersiál.
- TL tenke revee fali kustu no benefísiu projetu Tasi Mane
- Karik TMP ne'e "komersiál" di'ak liu setór privadu sira mak investe sira nia osan no lori risku.
- Tenke fó atensaun ba dezenvolve setór seluk atu atinje Timor-Leste sustentavel no ekitavel.

## Obrigado

Bele hetan informasaun tan iha

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

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