

# YELLOW ROAD WORKSHOP 2014

H  
A  
D  
I  
A



H  
A  
M  
E  
T  
I  
N

UMA - LARAN



# YELLOW ROAD WORKSHOP

29 -30 MAIU - 2014



## AJENDA



**1. ITA ATU BA NEBE?**

**2. ITA AGORA IHA NEBE?**

**3. ITA PRESIZA HALO SAIDA?**



TIMOR-LESTE  
STRATEGIC  
DEVELOPMENT PLAN  
2011 - 2030

VERSION SUBMITTED TO THE NATIONAL PARLIAMENT



# ITA ATU BA NEBE?

## APREZENTASAUN 1:

Planeamentu,  
Implementasaun &  
Monitorizasaun

# ITA ATU BA NEBE?

**PED: Nasaun ho Rendimentu Médiu-Altu iha 2030**

*Halakon ki'ak, sidadaun tomak moris saudavel no edukadu, no iha nivel moris nebe hanesan*

Programa V Governu (2012-2017),  
MDG (2015) & New Deal.

Planu Asaun  
Anual





# ITA ATU BA NEBE?

## Faze Implementasaun PED



### PLANU ESTRATEJIKU DEZENVOLVIMENTU NASIONAL 2011-2030

*“Visaun: Timor-Leste Sai Nasaun ho Rendimentu Médiu-Altu iha 2030”*

PLANU BA 2011-2015

PLANU BA 2016-2020

PLANU BA 2021-2030

#### FAZE I

- Dezenvolve Rekursus Umanus;
- Dezenvolve Infra-estrutura;
- Hametin Institusoens
- MDGs no “New Deal”

#### FAZE II

- Kontinua Dezenvolve Infra-estrutura;
- Hametin Rekursus Umanus;
- Haburas Kompetividade Ekonomika

#### FAZE III

- Halakon Ki’ak;
- Haforsa Sétor Privadu no “Kooperativa;
- Moderniza no Diversifika Ekonomia



# ITA ATU BA NEBE?

## Diversifikasaun Ekonomia



**PLANU ESTRATEJIKU DEZENVOLVIMENTU NASIONAL 2011-2030**

*“Visaun: Timor-Leste Sai Nasaun ho Rendimentu Médiu-Altu iha 2030”*

### TRANSFORMA ESTRUTURA EKONOMIA

Moderniza no Diversifika Ekonomia

AGRIKULTURA

TURISMU

PETROLIFERU

**SETORES PRINSIPAIS: Dezenvolvimentu Infra-estrutura no Rekursus Umanus**



# ITA ATU BA NEBE?

Programa V Governu (2012-2017)



## METAS PRINSIPAIS 2015

**OBJETIVU:** *Iha Oportunidades ba ema hotu-hotu ho forma justa no inkluziva, no kresimentu ekonomiku nebe dinâmika no inovadora.*

### KAPITAL SOCIAL

- 93% labarik asesu ona ba kualidade ensinu baziku;
- Iha ona postu saude ba Suco ho populasaun 1,500 and 2,000;
- Kuaze 55,000 uma harí ona ba ema ki'ak

### EKONOMIA

- Produtividade sétor agrikultura aumenta signifikante, sétor turismu buras no ekspanda ona, no sétor privadu involve ona iha industria hotu hotu, liu-liu husi empreza kiik no médiu.

### INFRAESTRUT URA

- Estradas rurais tomak rehabilita ona;
- 75% populasaun rural asesu ona ba be mos;
- Povu tomak hetan ona naroman durante 24 oras no asesu ona ba linha telekomunikasaun;
- Portu nebe iha rehabilita ona.

### Setores PED

### PSGs

### MDG

**Dezenvolvimentu Ekonomiku**

**Aliserse Ekonomiku**

**Eradika ki'ak no hamlaha**

**Sosial Kapital**

**Servisus & Reseitas**

**Ensinu Baziku Universal**  
**Hamenus mortalidade labarik**  
**Hadia saude inan**

**Governasaun**

**Lejitimidade Politika**

**Justisa**

**Seguransa**

**Kombate Malaria, HIV no moras seluk**

**Promove igualidade jeneru**

**La iha metas espesifiku**

**La iha metas espesifiku**

**Planu dezenvolvi mentu Infra-estruturaha PED atu suporta dezenvolvi mentu sosiu-ekonomiku nebe inklusivu no sustentavel**



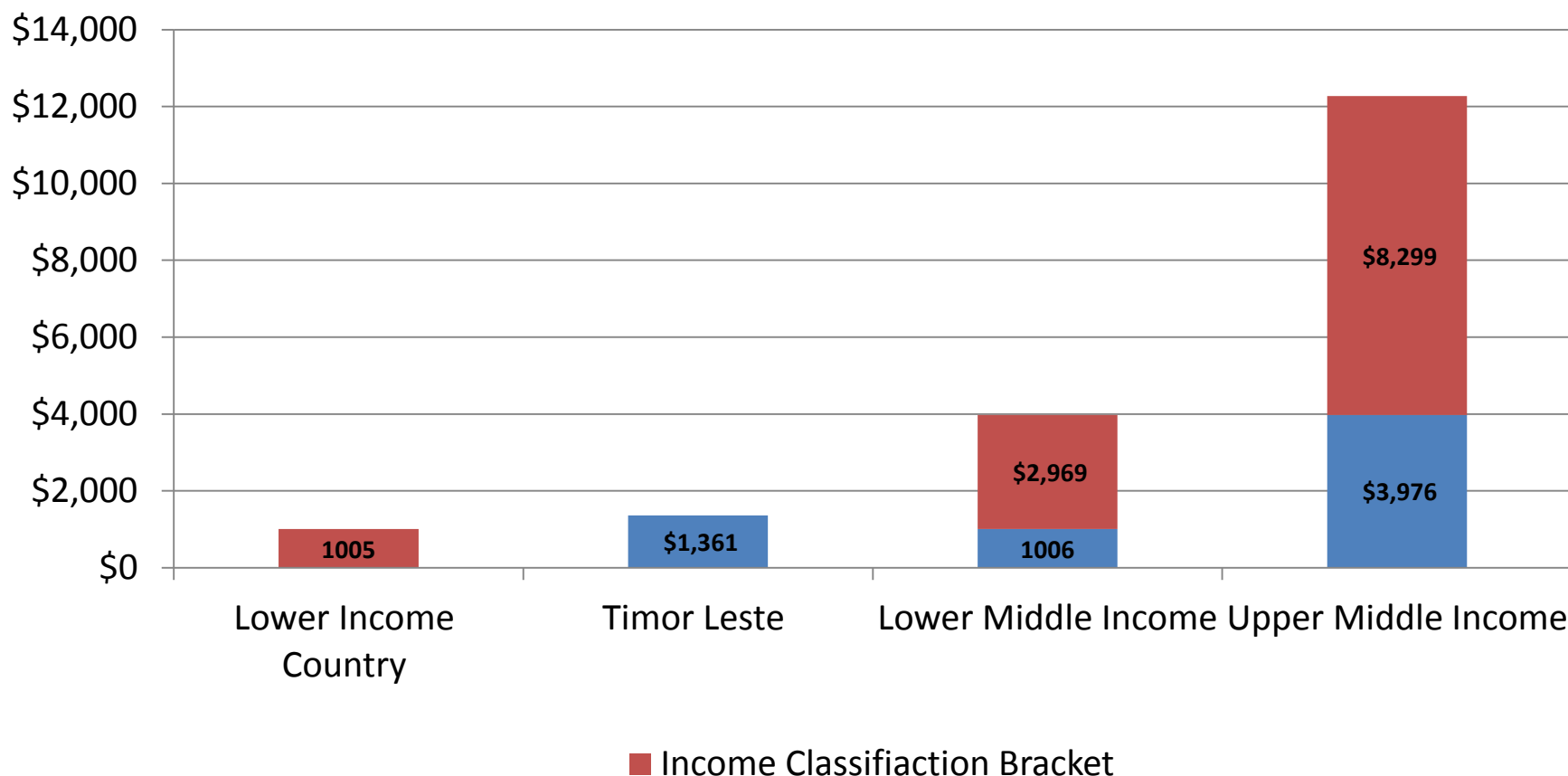


# ITA ATU BA NEBE?

Timor-Leste Hakarak Sai Nasaun  
Ho Rendimentu Médiu - Altu iha 2030

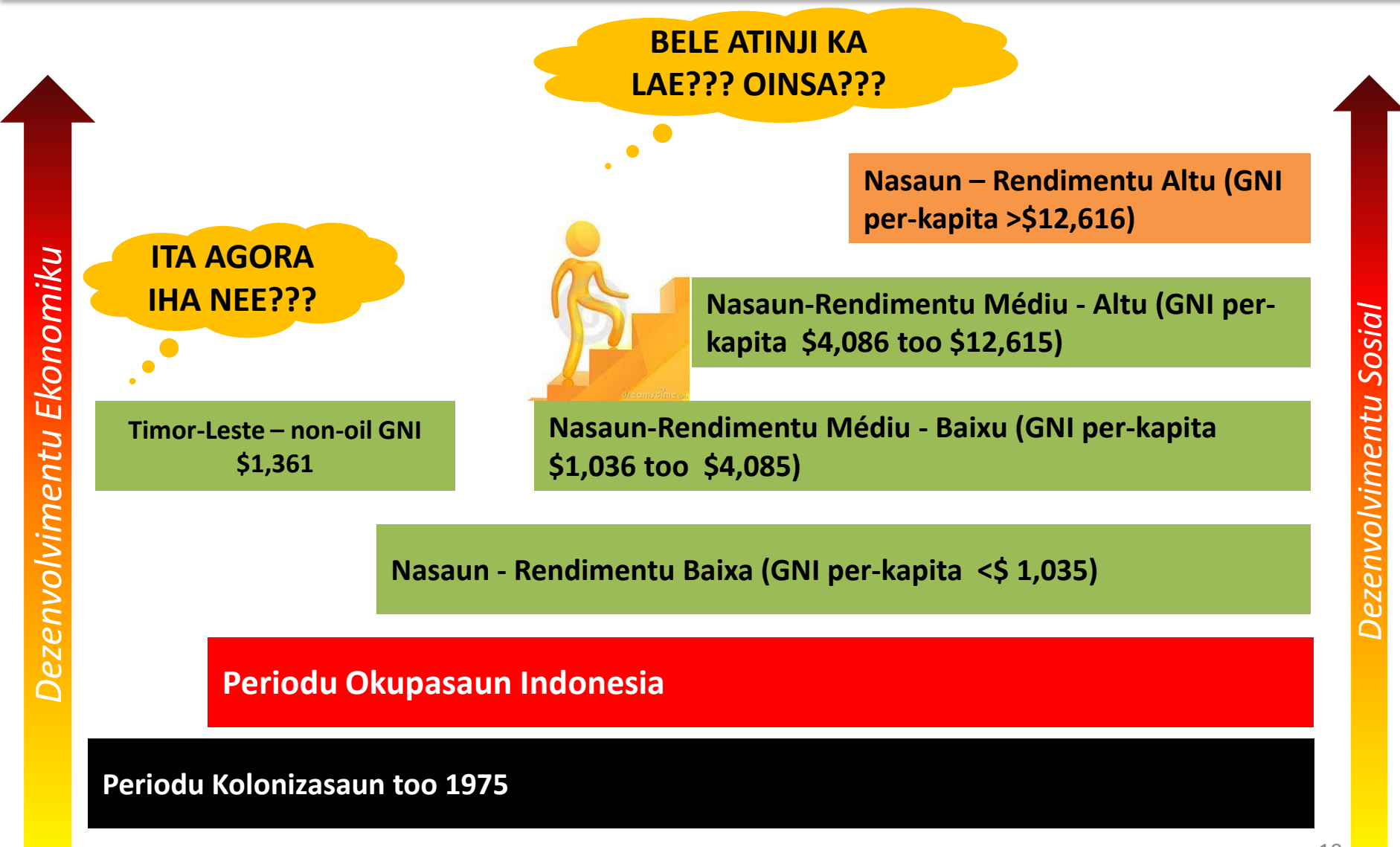


## Klasifikasaun Nasaun bazeia ba Rendimentu Per-kapita GNI (2011)



# ITA ATU BA NEBE?

## Oinsa Atu Sai Nasaun ho Rendimentu Médiu - Altu



BELE ATINJI KA LAE??? OINSA???

Nasaun – Rendimentu Altu (GNI per-kapita >\$12,616)

Nasaun-Rendimentu Médiu - Altu (GNI per-kapita \$4,086 too \$12,615)

Nasaun-Rendimentu Médiu - Baixu (GNI per-kapita \$1,036 too \$4,085)

Nasaun - Rendimentu Baixa (GNI per-kapita <\$ 1,035)

Timor-Leste – non-oil GNI \$1,361

Periodu Okupasaun Indonesia

Periodu Kolonizasaun too 1975

ITA AGORA IHA NEE???

Dezenvolvimentu Ekonomiku

Dezenvolvimentu Sosial



# ITA ATU BA NEBE?

## Vizaun PED – Oinsa Atu Atinji



- Atu atinji PED, TL tenki iha média kresimentu ekonomiku boot ba tempu naruk, tinan eskola aumenta ba 12.4, investimentu nebe boot, kampu trabalhu nebe barak no iha produtividade

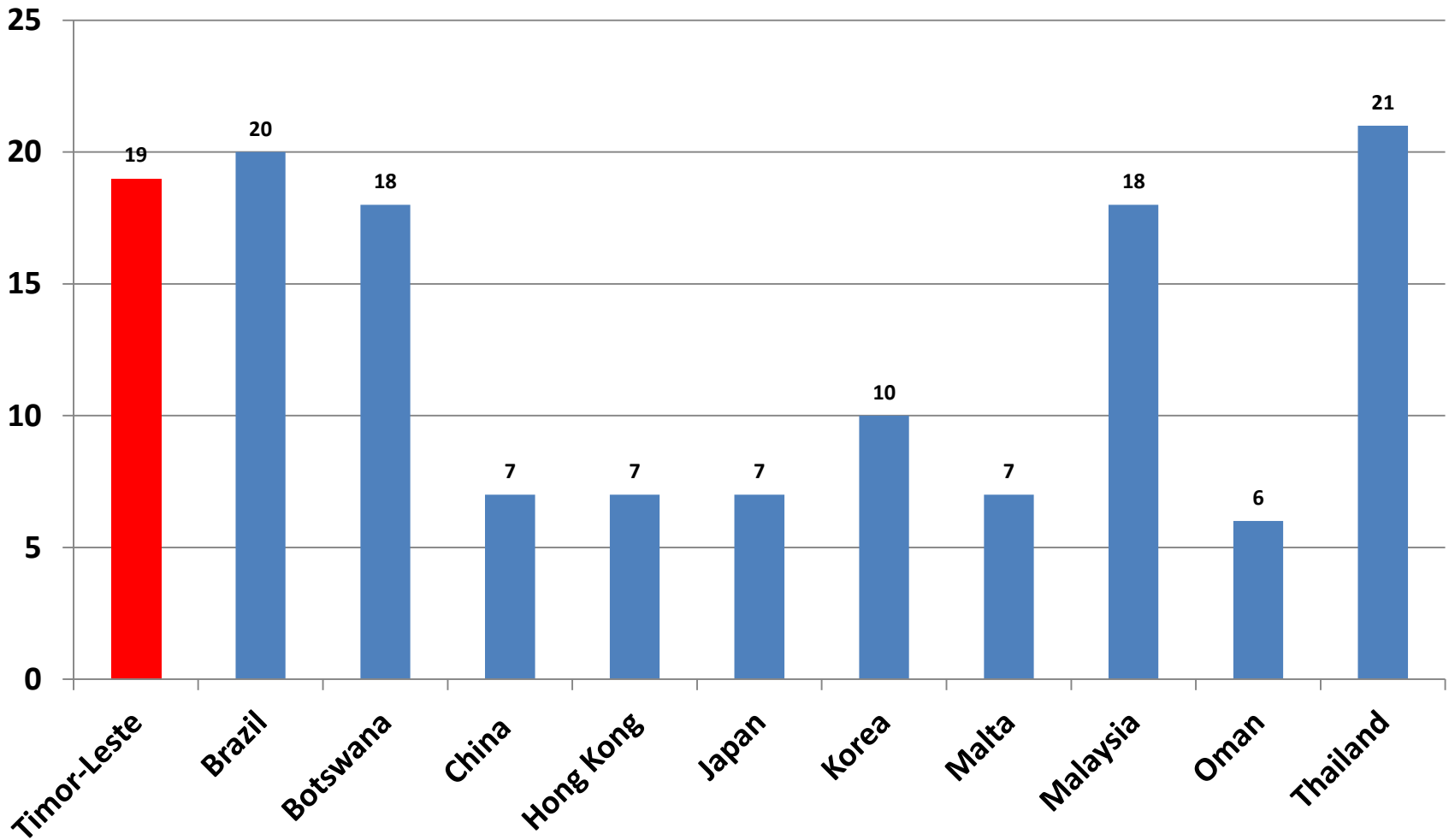
SENARIU	INDIKADOR IHA 2030		INVESTIMENTU (Average) "USD Billion"	TRABALADOR (Average) "000 pesoas"	PRODUTIVIDADE (TFP) (Kresimentu %)
	Rendimentu > USD 3,946	Edukasaun (Tinan 12)			
Senariu A: Low Growth Rate (8.5%)	USD 2,611	Tinan 8.3	USD 1.153	470	1.6
Senariu B: Moderate Growth Rate (9.5%)	USD 3,136	Tinan 8.9	USD 1.301	517	1.8
Senariu C: High Growth Rate With Labor Intensive (11%)	USD 4,117	Tinan 12.4	USD 1.134	752	1.4
Senariu D: High Growth Rate With Capital Intensive	USD 4,117	Tinan 12.4	USD 2.117	517	1.2

- Husi tinan 1950, Nasaun 13 (husi total 193 nasaun) mak iha média kresimentu ekonomiku liu 7% iha tinan 25 nia laran.
- Iha nasaun 6 deit mak ho GNI per-kapita hanesan ho Timor-Leste no sai nasaun ho rendimentu média - altu menus husi tinan 18



# ITA ATU BA NEBE?

“Economic Miracle Countries” Persiza Tinan Hira  
Hodi Sai Nasaun Rendimentu Médiu - Altu

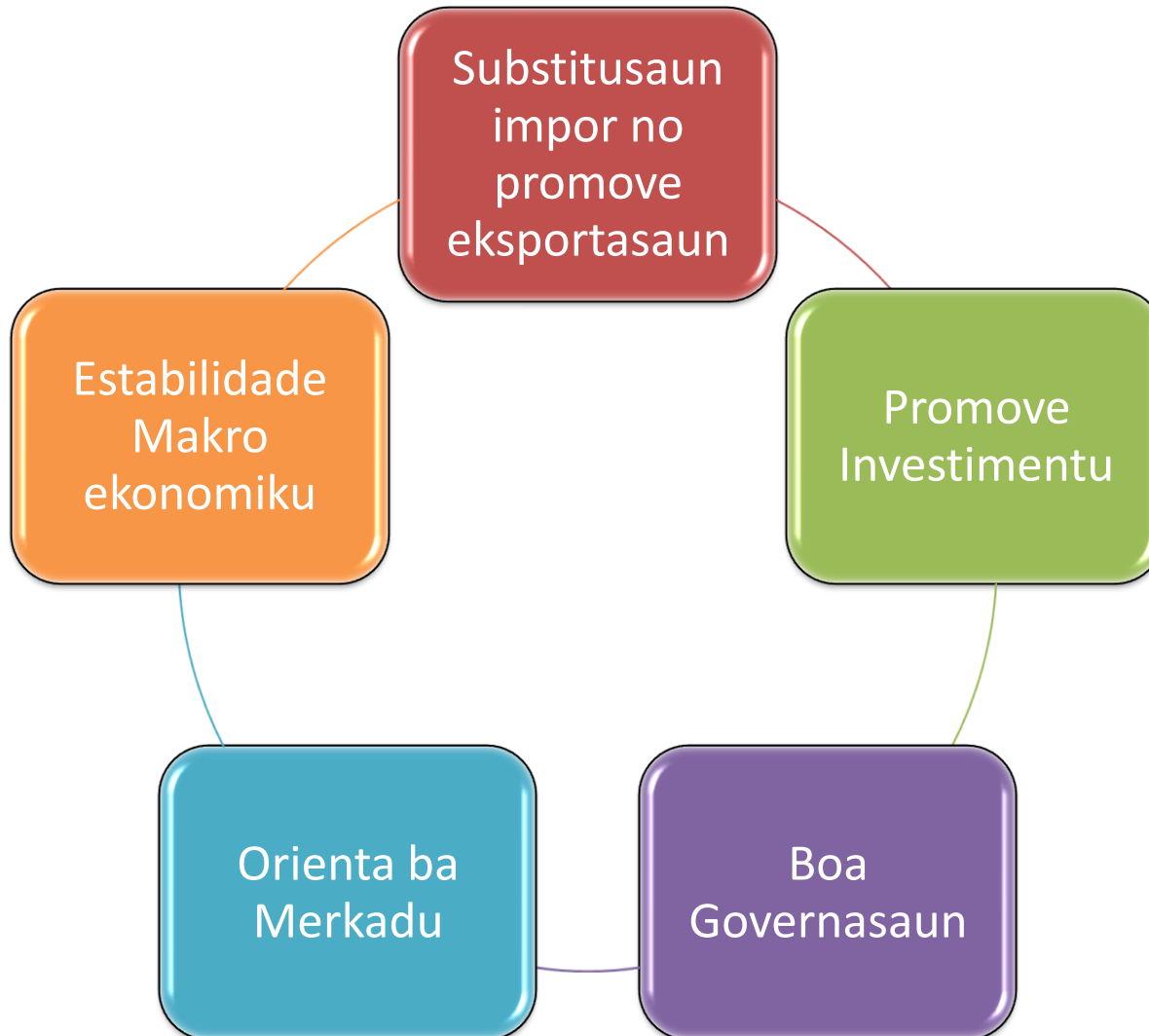




# ITA ATU BA NEBE?



Estratejia Iha “Mirracle Economic Countries” Hodi Sai Nasaun  
ho Rendimentu Médiu - Altu







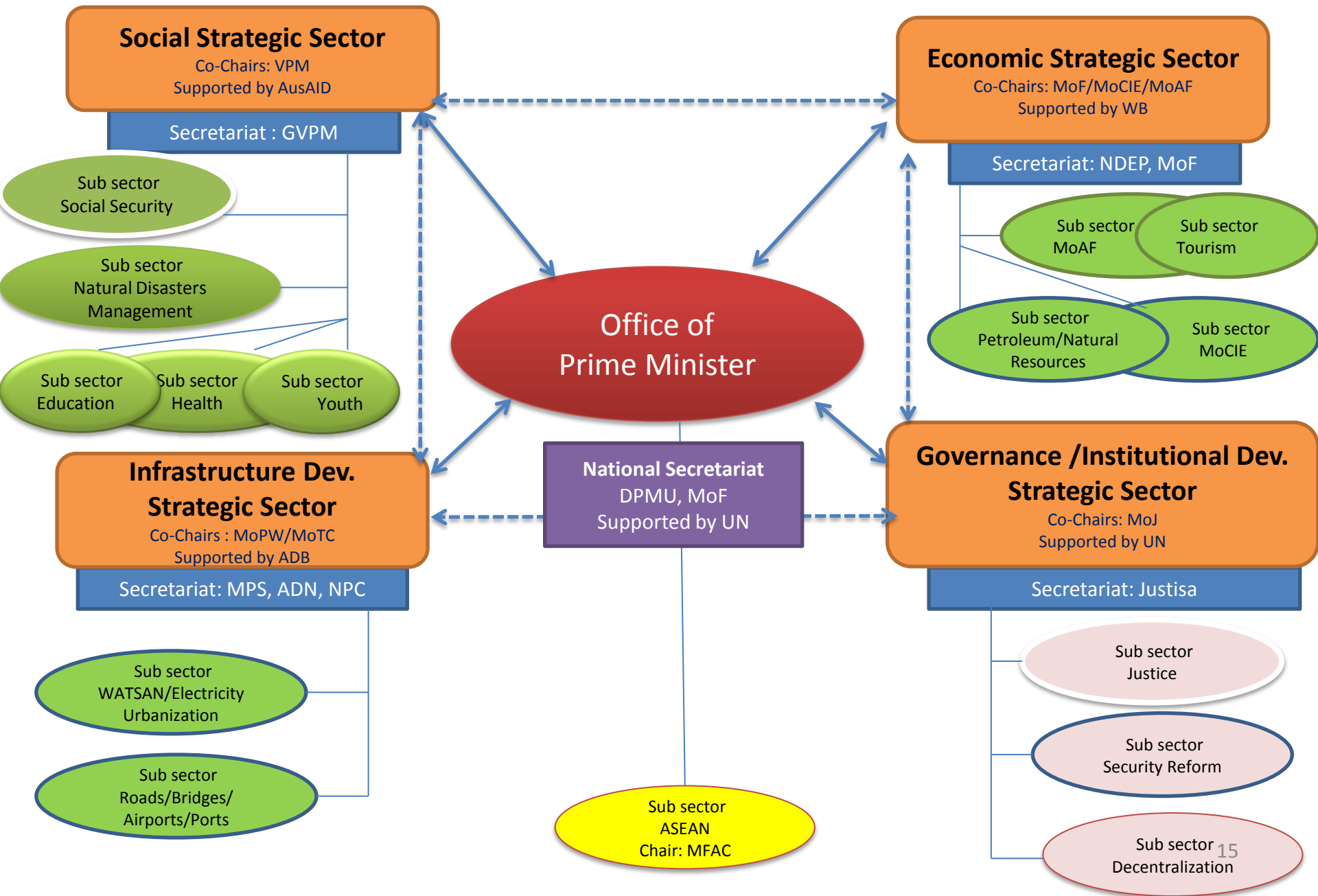
# ITA ATU BA NEBE?

## Aprezentasaun 2:

Mekanismu Koordenasaun Politika Dezenvolvimentu (MKPD)

# ITA ATU BA NEBE

## Estrutura Mekanizmu Koordinasoun Politika Dezenvolvimentu





# ITA ATU BA NEBE

## Objetivu MKPD



### MKPD:

Nudar mekanismu koordenasaun ida atu operacionaliza no implementa PED (2011-2030) no programa Governu.

### Objetivu MKPD:

- Atu identifika prioridades no hadia no hametin koordenasaun servisu intra no inter-ministerial
- Atu planea, koordena, implementa no monitoriza programa governu.
- Atu sai nudar forum dialogue ba programa dezvoltamentu entre Governu Timor-Leste no Parseiru Dezenvolvimentu sira.



# ITA ATU BA NEBE?

## Matrix PED



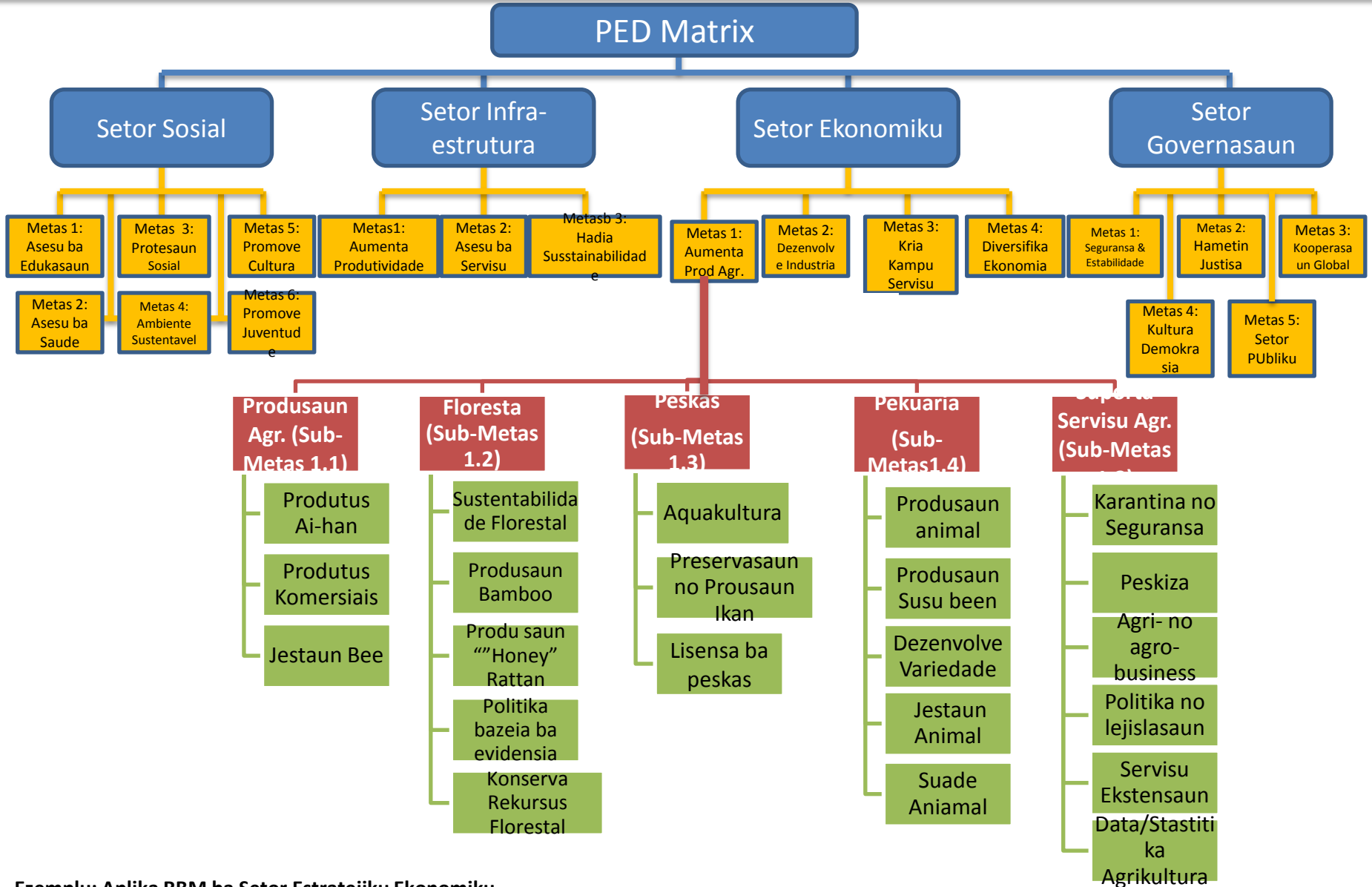
## Aplika Prinsipiu “*Result Based Management (RBM)*” ba Matrix PED

### Komponente Importante iha RBM:

1. Hirarkia ba metas → Jestaun
2. Alokasaun Responsabilidade → Akuntabilidade
3. Estabelese Alvu → Planeamentu

# 1. Hirarkia ba Metas

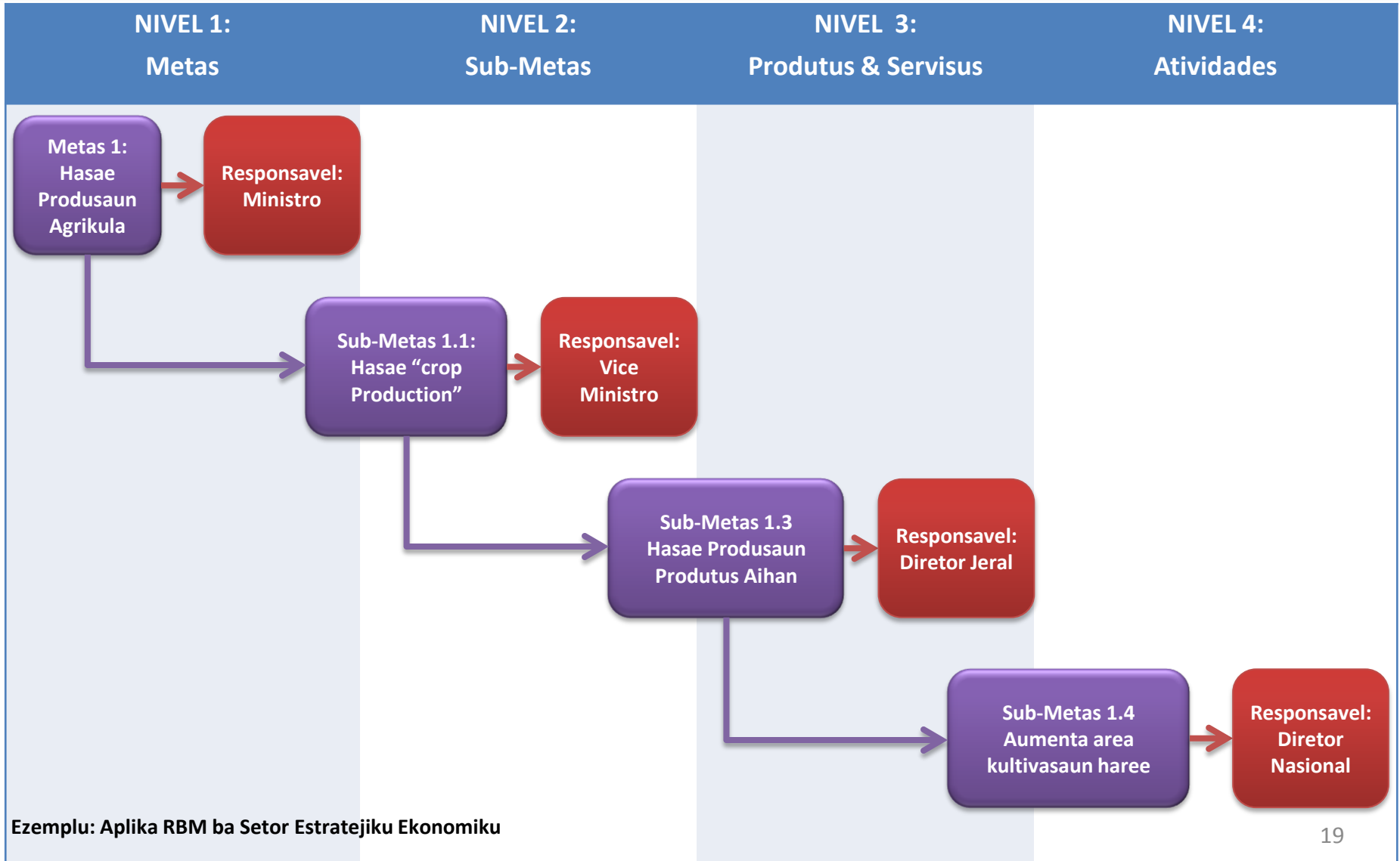
Atividades iha objetivus no sub-objetivus nia okos hodi fasil atu jere no monitoriza





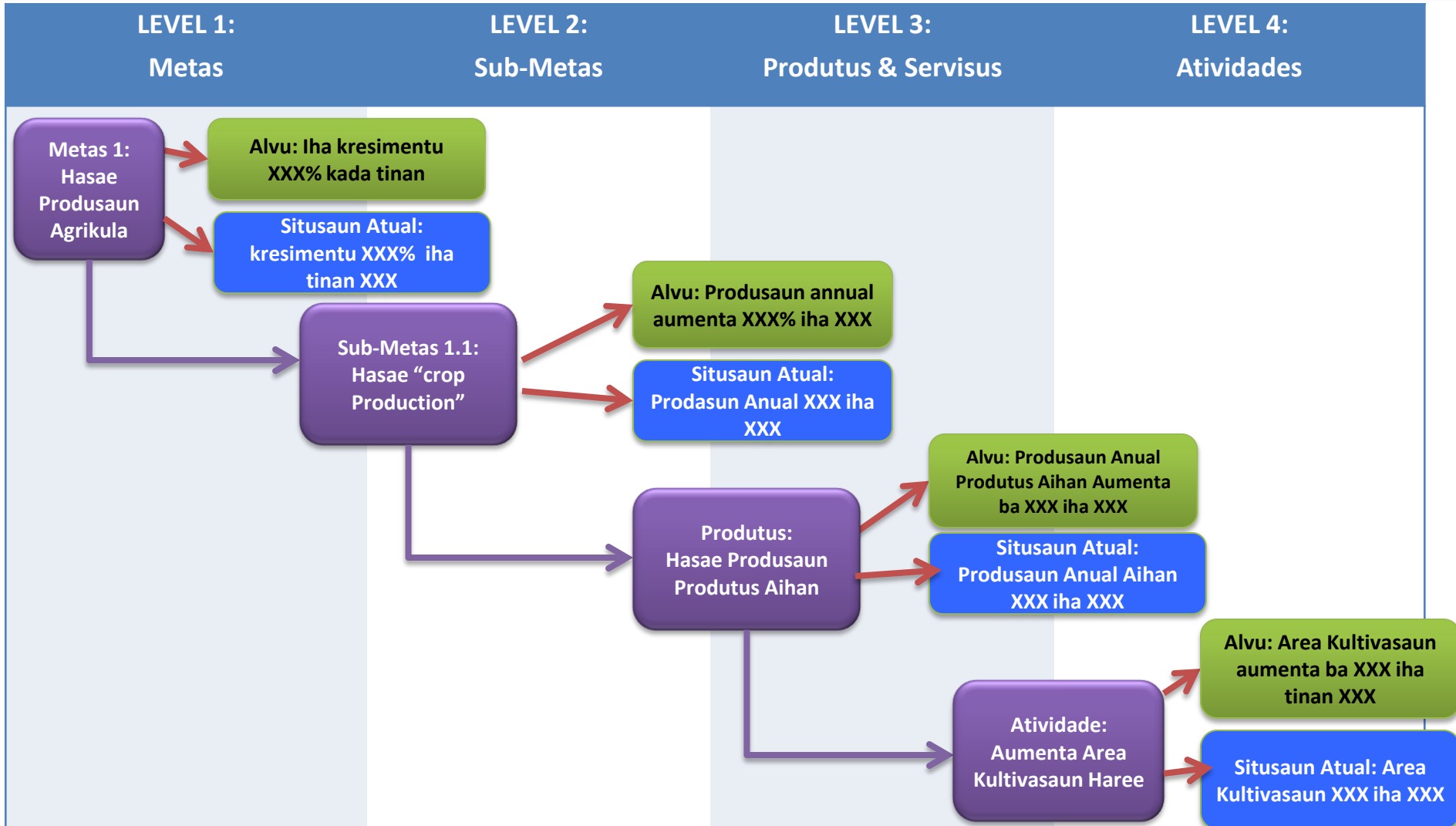
# ITA ATU BA NEBE?

## 2. Aloksaun Servisu no Responsabilidade Iha alokasaun no responsabilidade servisu nebe klaru



## 3. Estabelese Metas

Kada objektivu, sub-objektivus no atividades iha metas no situasaun atual





# ITA ATU BA NEBE?

## Ezemplu Matrix PED



Level 1 (Meta)	Level 2 (Sub-Metas)	Level 3 (Produtus & Servisu)	Level 4 (Atividades Prinsipais)
<p><b>Hasae Produsaun Agrikula</b></p> <p><u>Alvu:</u> Kresimentu anual ba Setor XXX%. <b>(Situasaun Atual: kresimentu anual ba setor XXX% iha tinan XXX )</b></p>	<p><b>Hasae “Crop production”</b></p> <p><u>Alvu:</u> Produsaun anual ba “crop” sae XXXX%. <b>(Situasaun Atual: Produsaun anual “crop” XXX% iha tinan XXX )</b></p>	<p><b>Hasae produsaun ba produtus aihan</b></p> <p><u>Meta:</u> Produsaun anual ba produtus aihan sae XXX% <b>(Situasaun Atual: Produsaun anual ba produtus aihan XXX% iha tinan XXX) )</b></p>	<p><b>Haree Hasae produsaun haree</b></p> <p><u>Alvu:</u> Hasae produsaun haree ba 167,000 toneladas/tinan iha tinan XXXX <b>(Situasaun Atual: Produsaun haree XXXX toneladas iha tinan XXX)</b></p> <p><u>Alvu:</u> Aumenta area kultivasaun ba haree too 57,000 hektares iha tinan XXXX <b>(Situasaun Atual: Area kultivasaun haree XXX hektares iha tinan XXX)</b></p>



# ITA ATU BA NEBE?

## Oinsa Monitoriza Prosesu Dezenvolvimentu



- Implementasaun PED:
  - PED Matrix
  - AAP
- Dezenvolvimentu Ekonomiku:
  - Indikadores Makro Ekonomia
- Dezenvolvimentu Sosial:
  - MDG
- Peace Building and State Building:
  - New Deal - liliu ho PSGs

# ITA AGORA IHA NEBE?

Apresentasaun 3 : Dezenvolvimentu Sosial - MDG



1

ERADICATE  
EXTREME POVERTY  
AND HUNGER



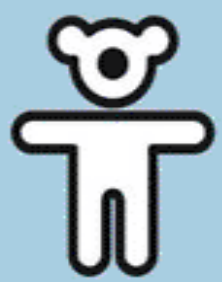
2

ACHIEVE UNIVERSAL  
PRIMARY EDUCATION



3

PROMOTE GENDER  
EQUALITY AND  
EMPOWER WOMEN



4

REDUCE  
CHILD MORTALITY

## Millennium Development Goals



5

IMPROVE MATERNAL  
HEALTH



6

COMBAT HIV/AIDS,  
MALARIA AND OTHER  
DISEASES



7

ENSURE  
ENVIRONMENTAL  
SUSTAINABILITY



8

GLOBAL  
PARTNERSHIP FOR  
DEVELOPMENT





# ITA AGORA IHA NEBE?



TL Nia Posizaun Frajilidade-Persepsaun Sosiedade

Objetivu	Faze Frajilidade				
	Faze 1: Krize	Faze 2: Hari'i & Reforma	Faze 3: Tranzisaun	Faze 4: Transformasaun	Faze: Rezilensia
1. Lejitimidade Politika					
2. Seguransa					
3. Justisa					
4. Fundasaun Ekonomia					
5. Reseita no Servisu					

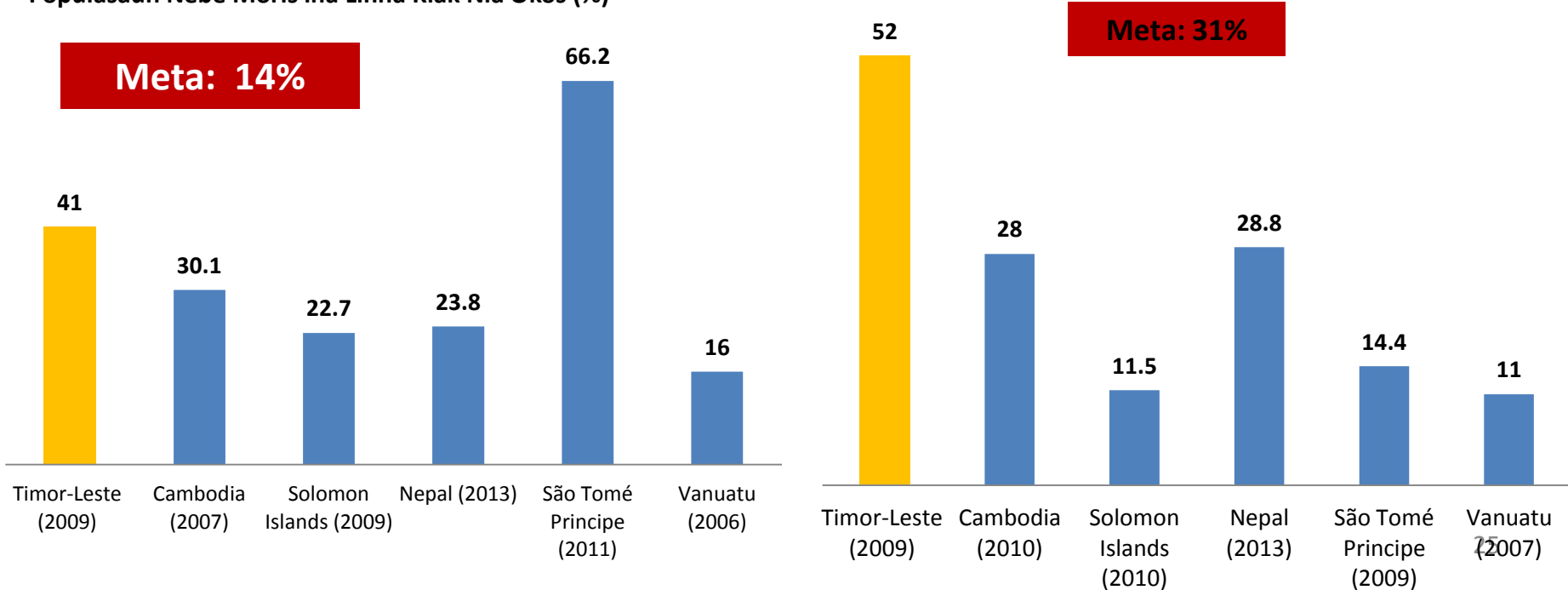
## Dezenvolvimentu Sosial: MDG 1 - Eradika Ekstreme Kiak no Hamlaha

- Presiza servisu maka'as, orientadu no integradu hodi hadia TL nia Indikadores sosiais
- Indikadores sosiais no kresimentu ekonomiku iha relasaun ba malu: Kresimentu ekonomiku aumenta rendimentu no hadia padraun moris uma kain, nunee mos trabalhador nebe produtivu (saudavel non edukadu) bele aumenta produtividade ekonomiku.

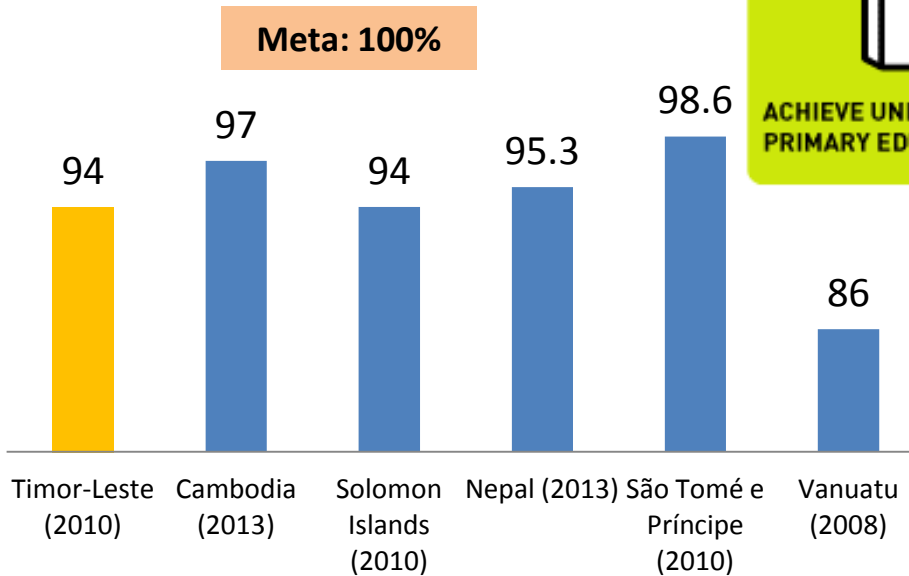


Labarik ho Idade Menus Tinan 5 Nebe Todan la Too (%)

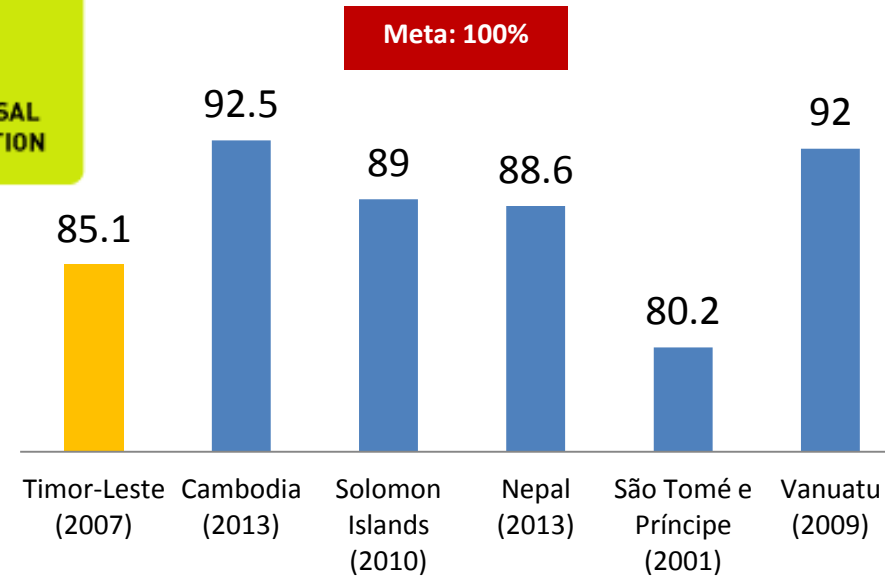
Populasaun Nebe Moris iha Linha Kiak Nia Okos (%)



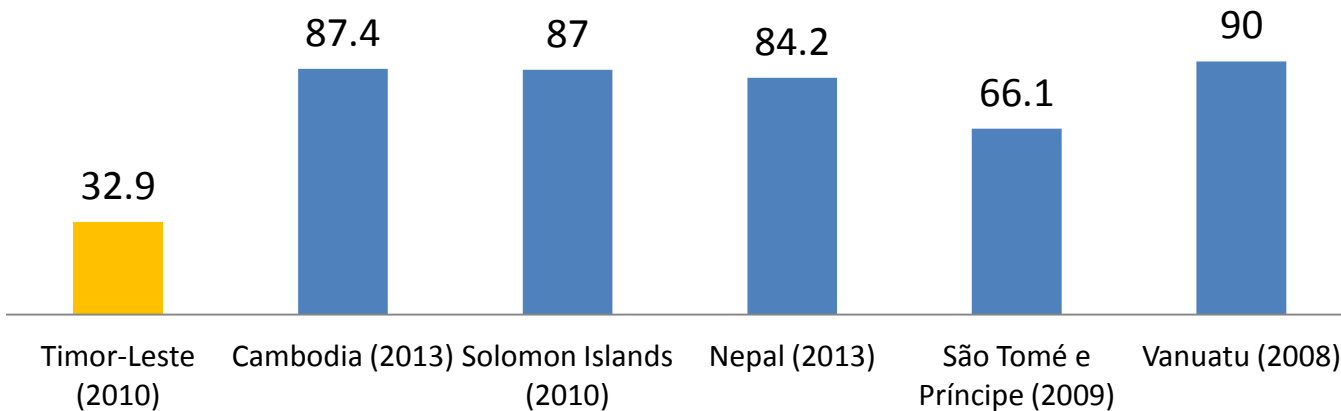
“Net Enrolment Rasio iha Ensinu Primaria” (%)



“Literacy rate of youth” (15-24) (%)

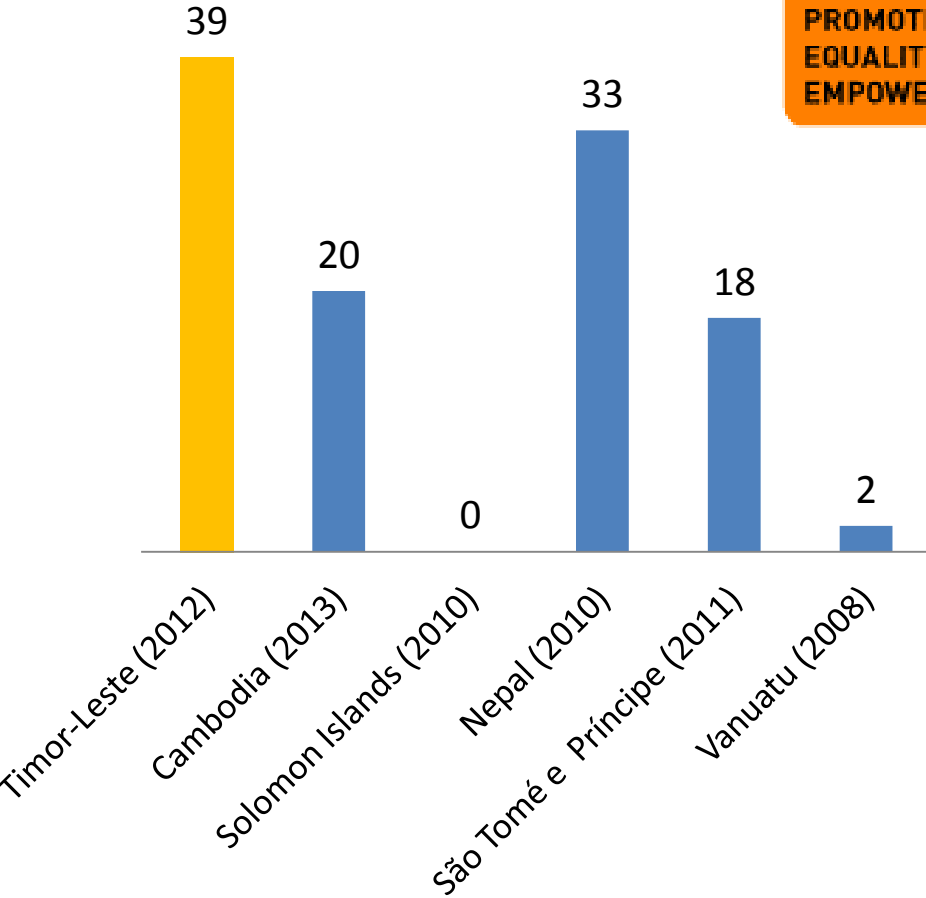


Taisa atu Kompleta Tinan Eskola iha Ensinu Primaria (%)



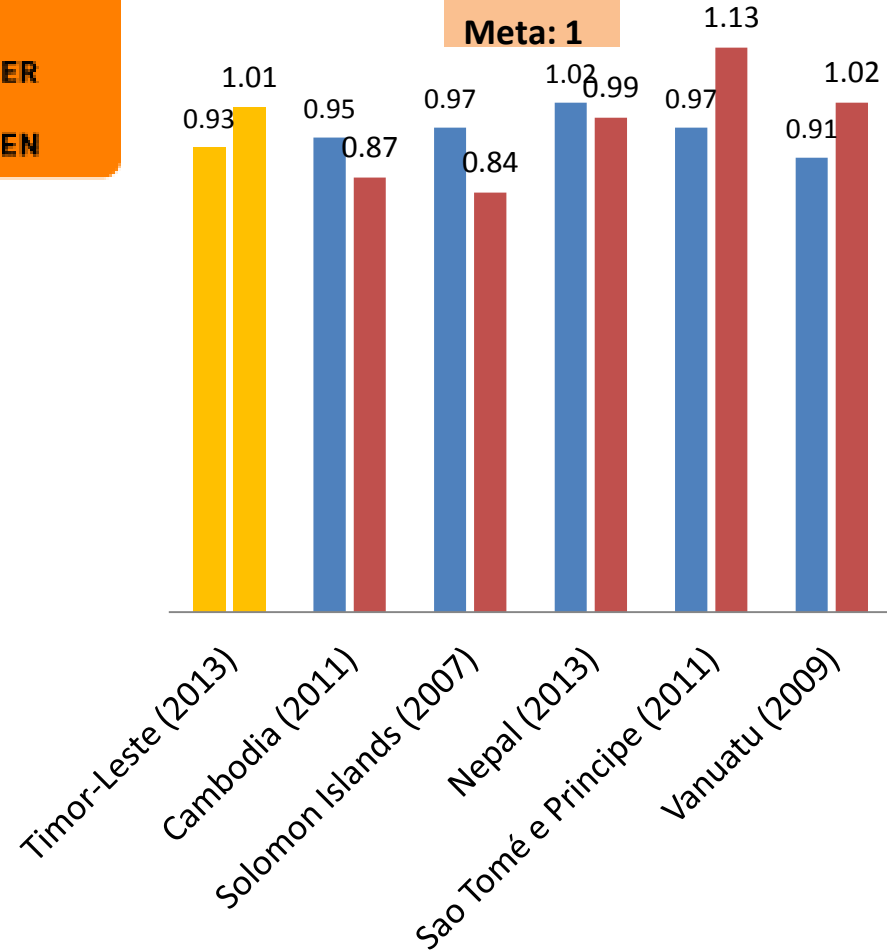
### Feto Iha Parlamentu

Meta: 35%



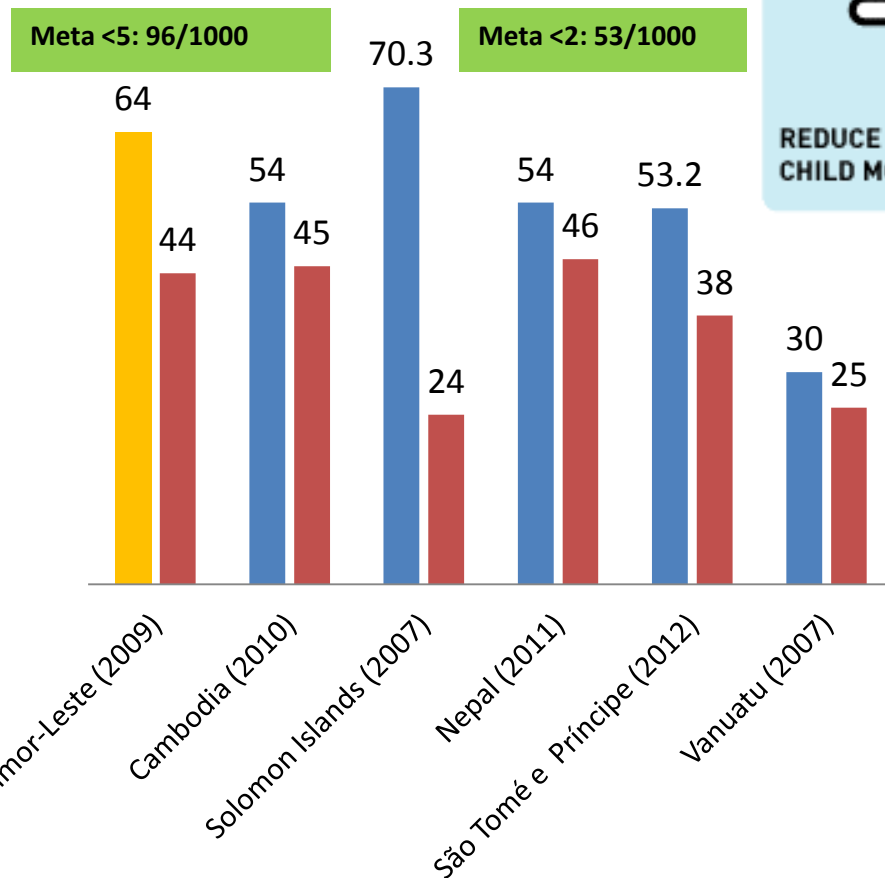
### Rasio Feto-Mane Iha Ensinu Primaria no Sekundaria

Meta: 1

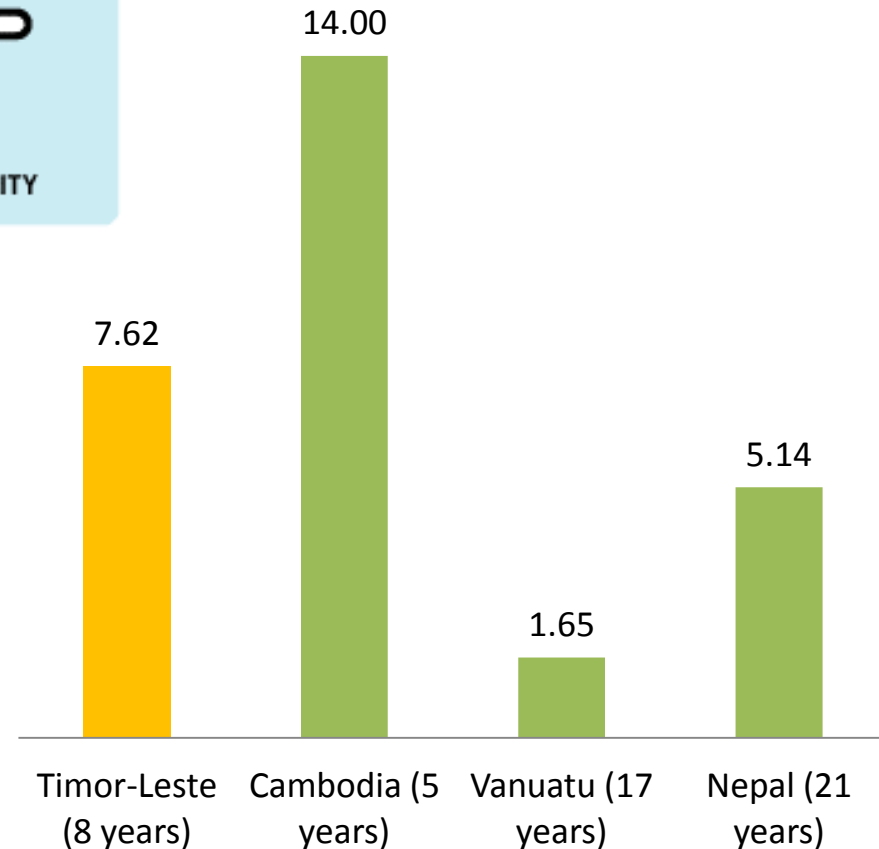


### Taisa Mortalidade Labarik ho Idade Menus Tinan 5

■ Under-5 Mortalityrate ■ Infant Mortality rate

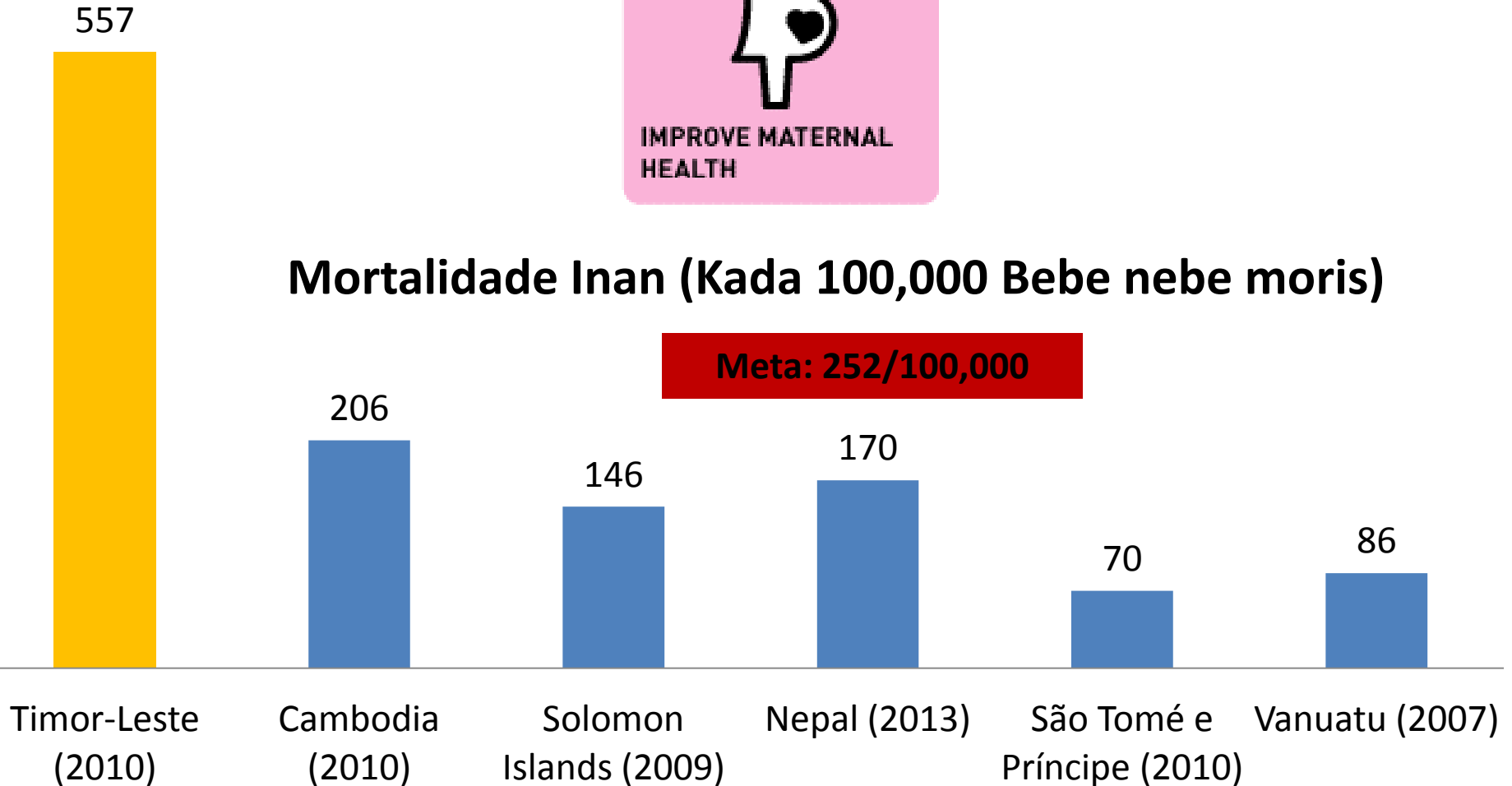


### Média Redusaun Anual ba Taisa Mortalidade Labarik ho Idade Menus Tinan 5



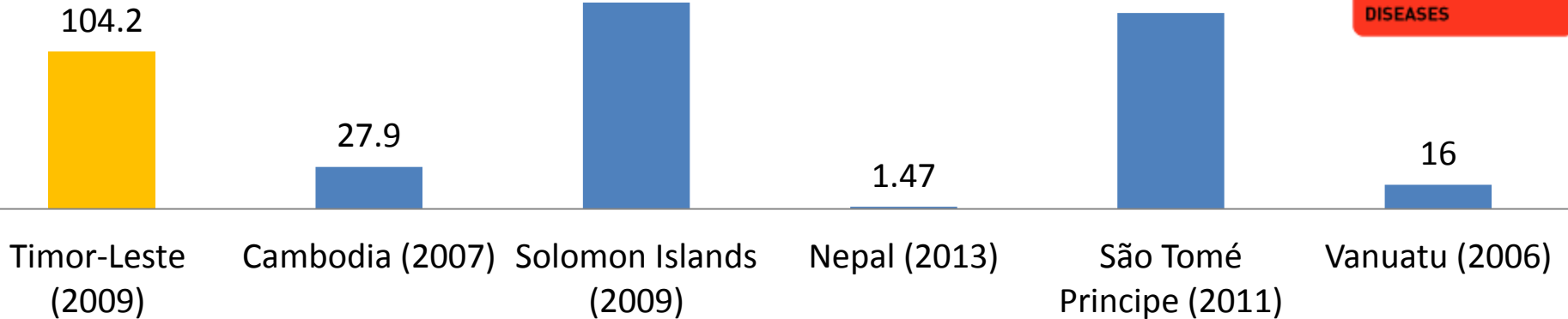


### Mortalidade Inan (Kada 100,000 Bebe nebe moris)



## Incidence of Malaria (per 1,000 of population)

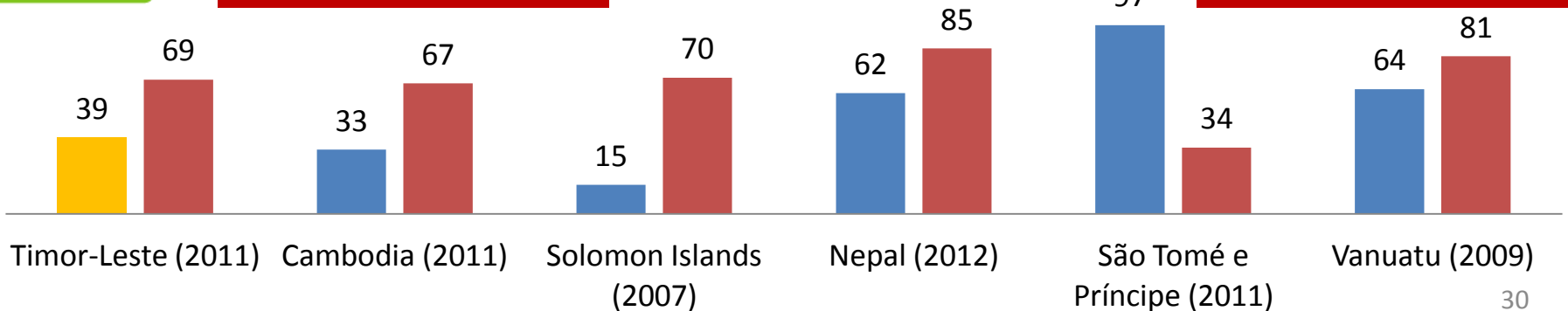
**Meta: 45/1,000**



■ Proportion of population using an improved sanitation facility  
■ Proportion of population using an improved drinking water source

**Meta Sanitation: 60%**

**Meta be mos: 78%**







# ITA AGORA IHA NEBE?

## Dezenvolvimentu Sosial: MDGs - Konkluzاون



Objektivus MDG = 8

Indikadores MDG =60

Indikadores nebee TL  
define nia metas = 24

Indikadores nebee  
atinji ona - 5

Indikador	Medida	Valor (tinan)	Meta 2015	Situasaun Atual
Proporsaun Feto iha Parlamento	%	38.5 (2012)	35	Atinji ona
Mortalidade infantil (menus tinan lima)	Por kada 1,000 moris	64 (2009)	96	Atinji ona
Mortalidade infantil (menus tinan rua)	Por kada 1,000	44 (2009)	53	Atinji ona
Proporsaun kasus TB nebe detekta (DOTS)	%	70 (2009)	70	Atinji ona
Proporsaun kasus TB nebe kura (DOTS)	%	88 (2010)	85	Atinji ona
Insidensia TB	Por kada 100,000	145 (2009)	138	On-track
Prevalensia TB	Por kada 100,000	378 (2010)	353	On-track
Proporsaun inan partus ho assistensia profisionais saude	%	29.6 (2009)	60	On-track



# ITA AGORA IHA NEBE?

Apresentasaun 4 : Dezenvolvimentu Ekonomia



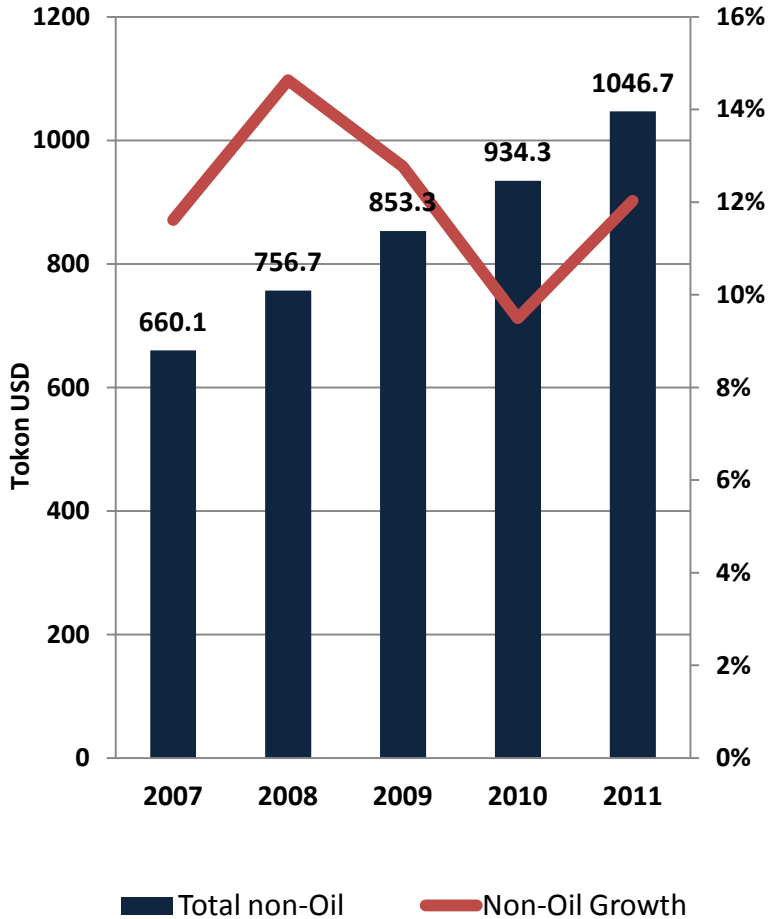
# ITA AGORA IHA NEBE?

Dezenvolvimentu Ekonomia: Total Ekonomia

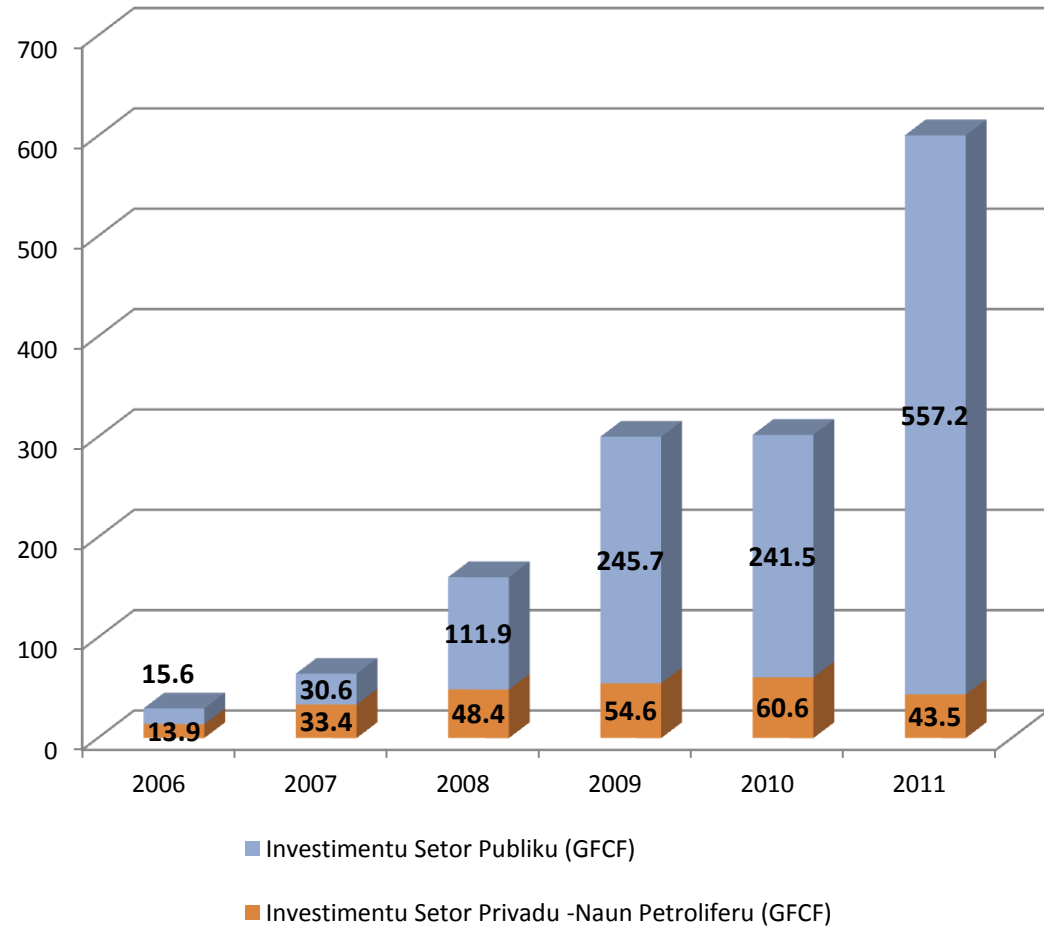


	2004	2005	2006	2007	2008	2009	2010	2011
<b>Tasa Kresimentu GDP (%)</b>		53.3	60.2	-0.6	12.1	-6.7	-1.4	7.3
<b>Sétor Pretroliferu (%)</b>		77.6	79.9	-2.7	11.6	-10.6	-4.1	6.0
<b>Sétor Naun-Petroliferu (%)</b>		6.5	-3.2	11.6	14.6	12.8	9.5	12.0
<b>Total GDP (\$M)</b>	1,675.6	2,568.3	4,113.4	4,088.2	4,583.0	4,275.0	4,215.6	4,525.1
<b>Sétor Petroliferu (\$M)</b>	1,102.2	1,957.5	3,522.0	3,428.1	3,826.3	3,421.7	3,281.3	3,478.4
<b>Sétor Naun-Petroliferu (\$M)</b>	537.3	610.8	591.4	660.1	756.7	853.3	934.3	1,046.7
<b>Total GDP Per-Kapita (\$)</b>	1,760	2,649	4,160	4,046	4,432	4,032	3,871	4,040
<b>Sétor Petroliferu (\$)</b>	1,158	2,019	3,561	3,393	3,700	3,228	3,013	3,106
<b>Sétor Naun-petroliferu (\$)</b>	602	630	598	653	732	805	858	935

**Kresimentu Ekonomiku Naun-Petroliferu**

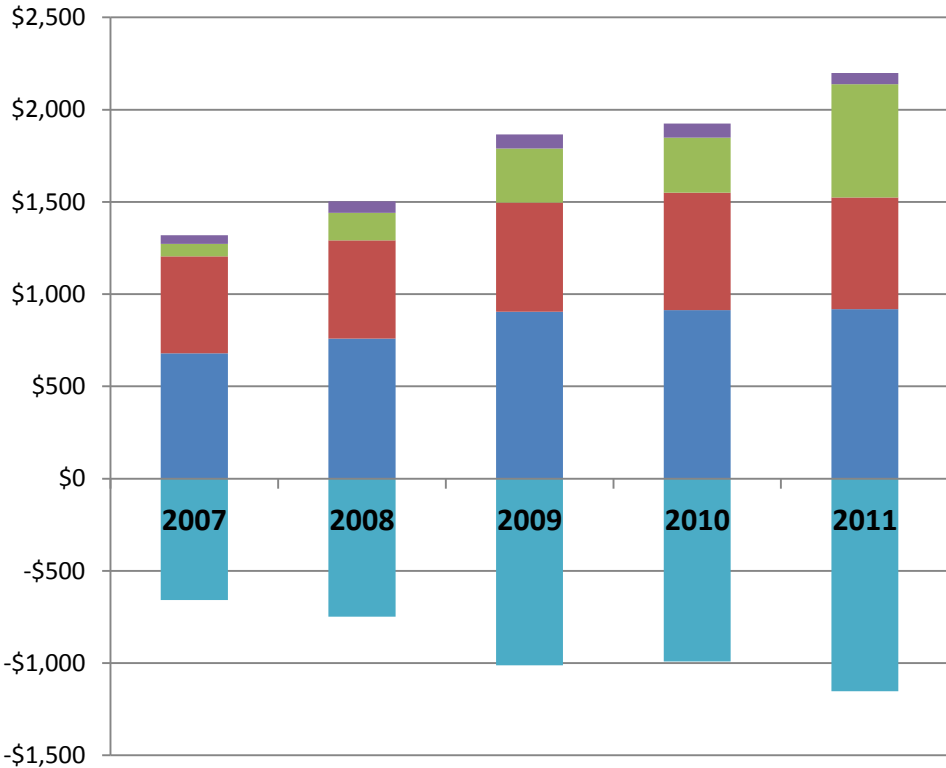


**Komparasaun Investimentu Husi Setor Privadu no Publiku (Naun Petroliferu)**

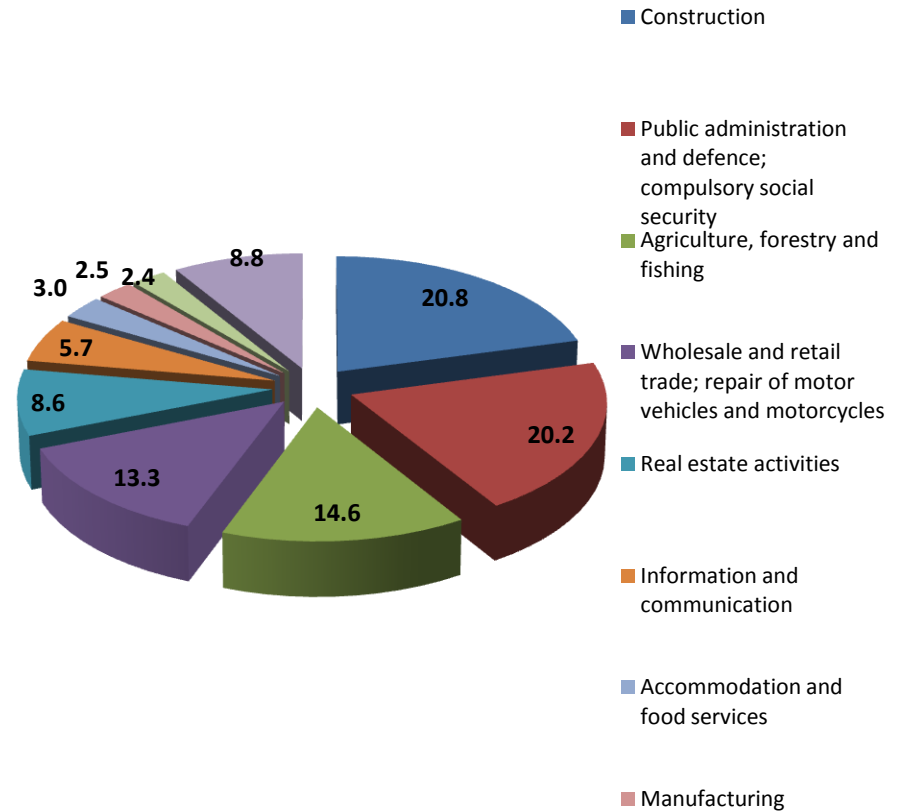


### PIB TL (USD Tokon) – Modelu Despeza

- Government Consumption
- Household and Other Consumption
- Government Investment
- Private Sector Investment
- Net Exports



### Kontribuisaun Sektoral ba PIB Naun-Petroliferu (2014)



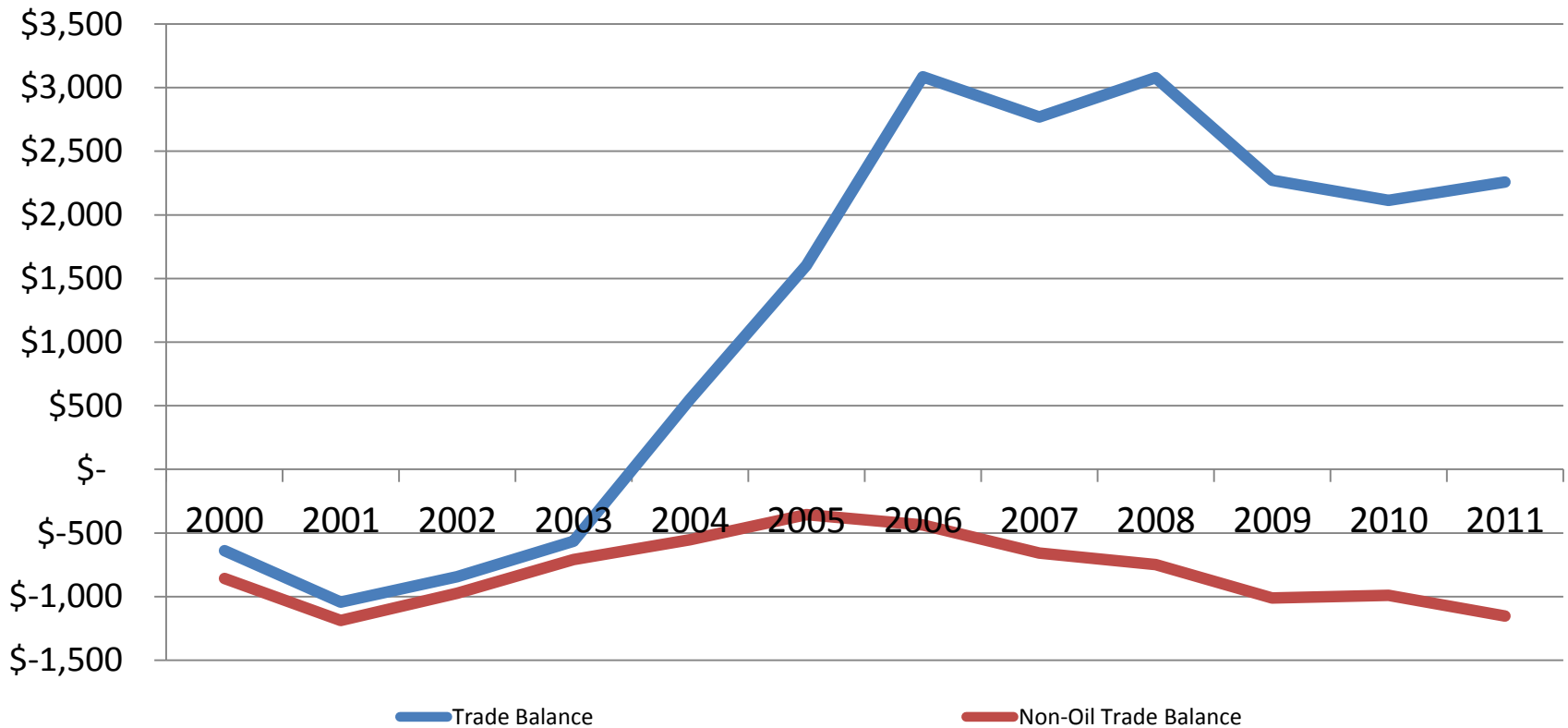


# ITA AGORA IHA NEBE?

Dezenvolvimentu Ekonomia: TL Defisit iha Komersiu Internasional  
(wainhira eksklui Mina-rai nudar produsus eksportasaun )



## Balansu Komersiu Timor-Leste (Tokon USD, Presu 2010)



Source: 2011 Timor-Leste National Accounts 2000-2011

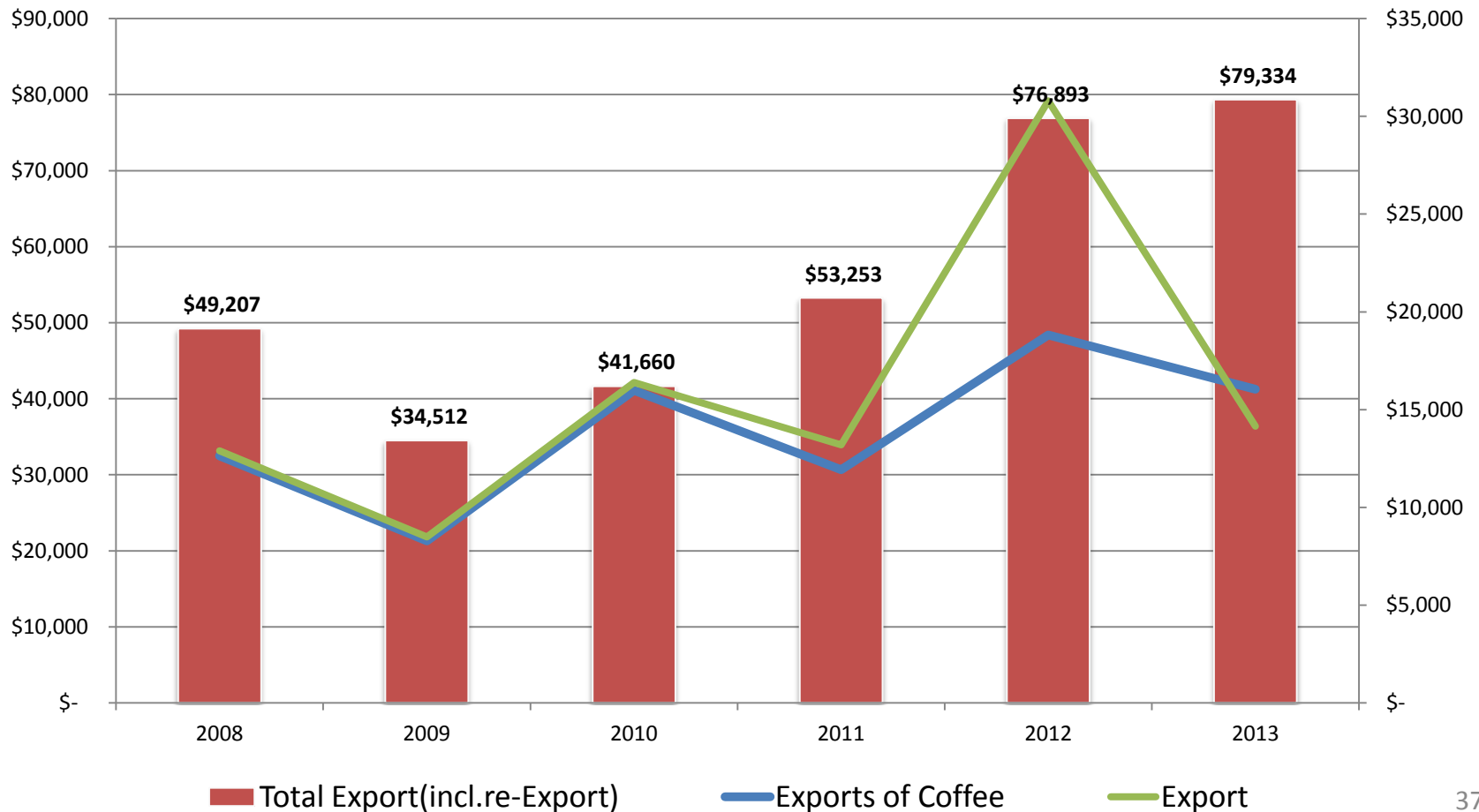


# ITA AGORA IHA NEBE?

Dezenvolvimentu Ekonomia: TL Nia Eksportasaun  
(Eksklui Mina-rai)



### TL Nia Eksportasaun (000 USD)







# ITA AGORA IHA NEBE?

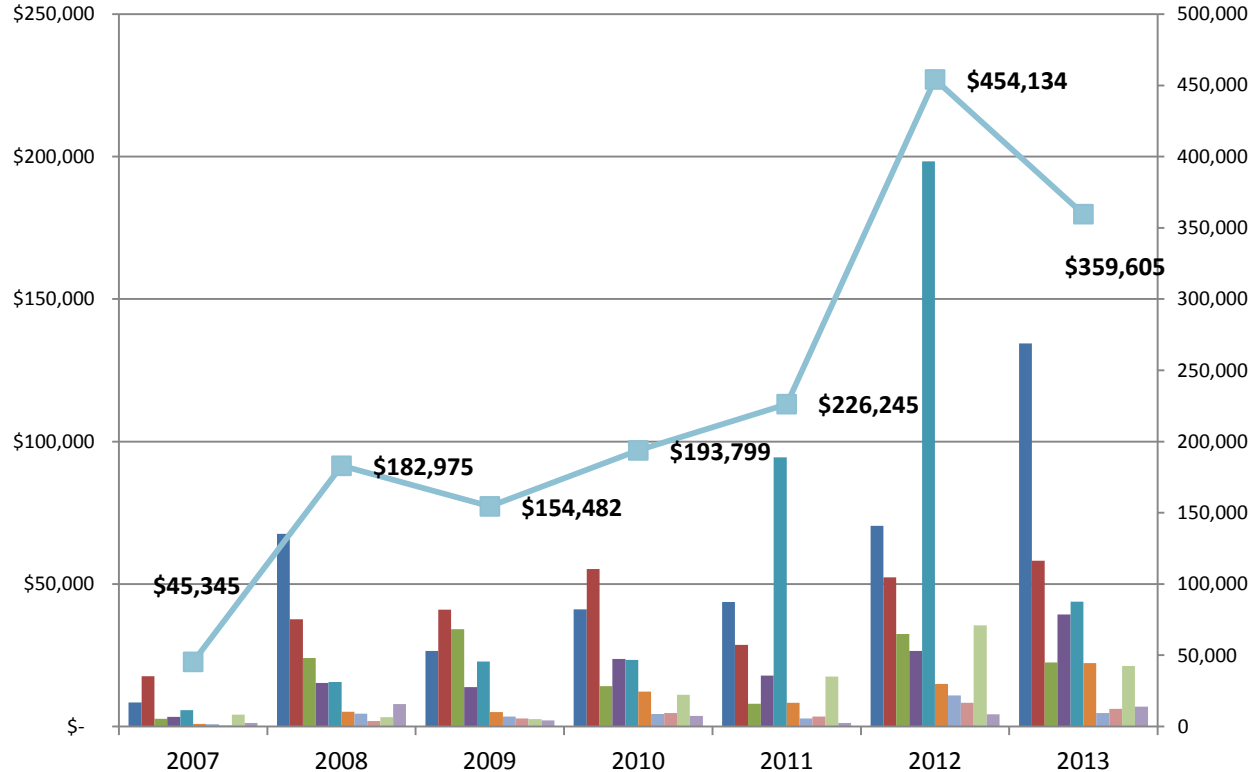
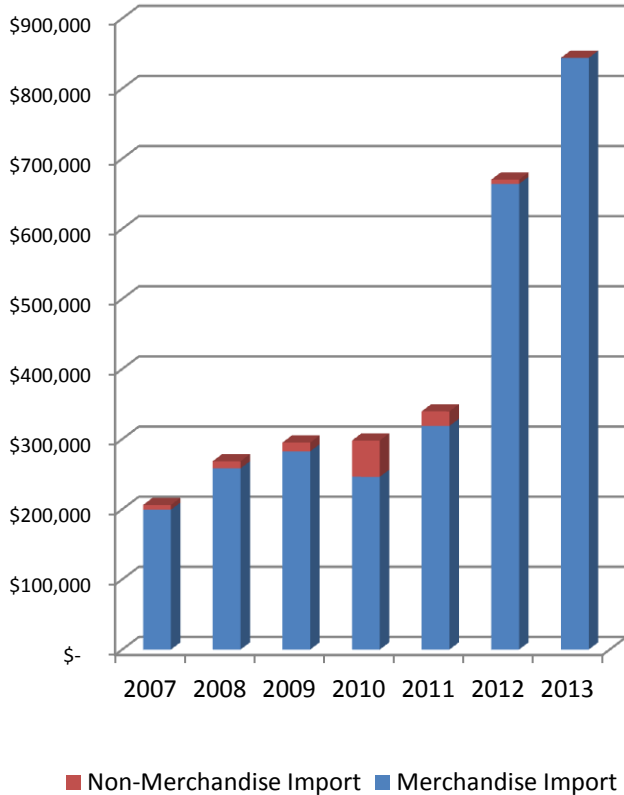
Dezenvolvimentu Ekonomia: TL Nia Importasaun (000 USD)



## Timor-Leste Nia Produtus Importasaun iha Lista "Top 10"

### Merchandise & Non Merchandise

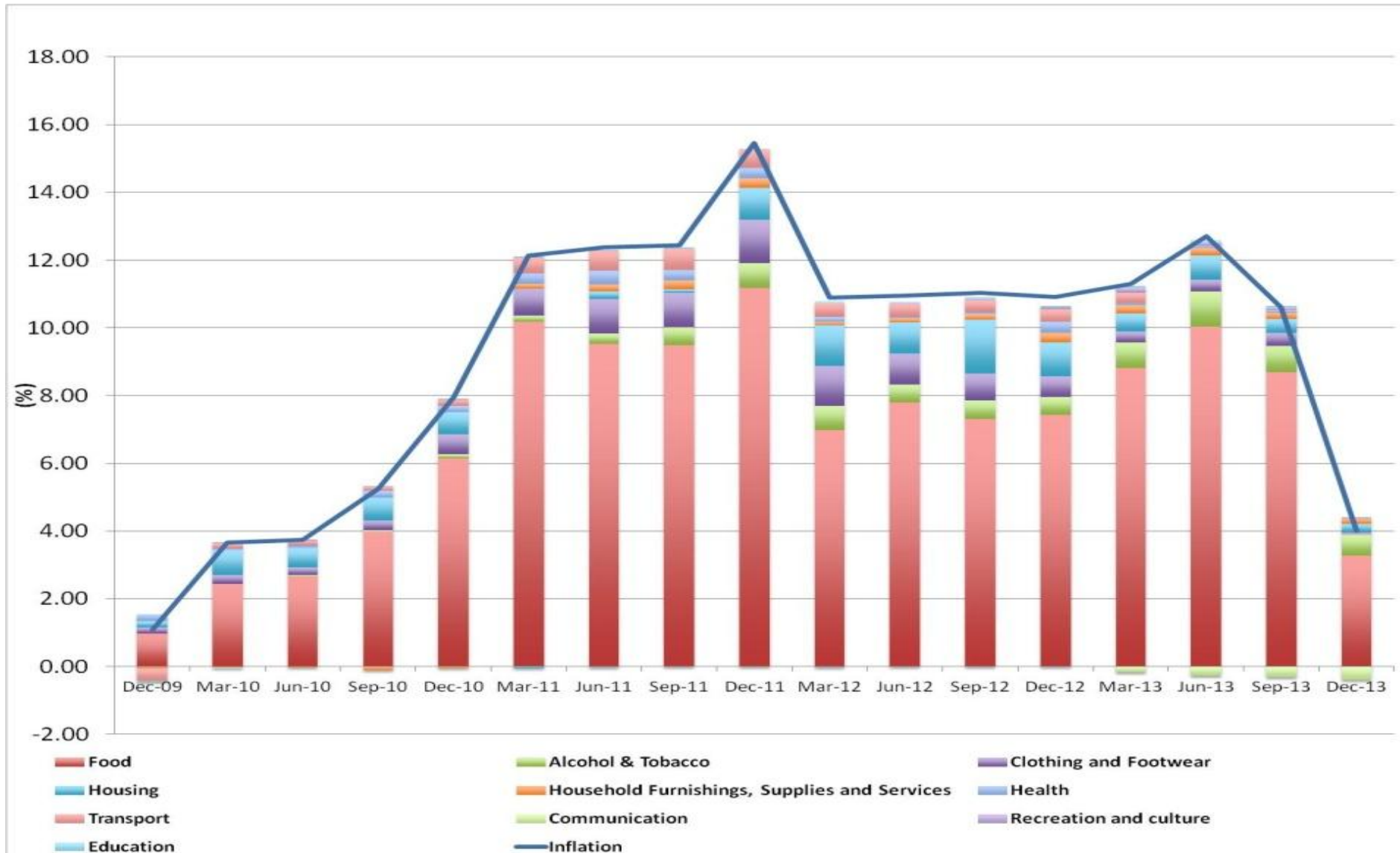
- Mineral products
- Vehicle & spareparts products
- Cereals products
- Machinery products
- Electrical machinery and electronic products
- Beverages, spirits and vinegar products
- Optical, photographic, cinematographic & surgical instruments
- Iron and steel products
- Iron or steel articles
- Pharmaceutical products





# ITA AGORA IHA NEBE?

Dezenvolvimentu Ekonomia: Kresimentu Ekonomia Boot Maibe  
Inflasaun Mos Boot – Iha Q4 2013, Inflasaun tun maka'as



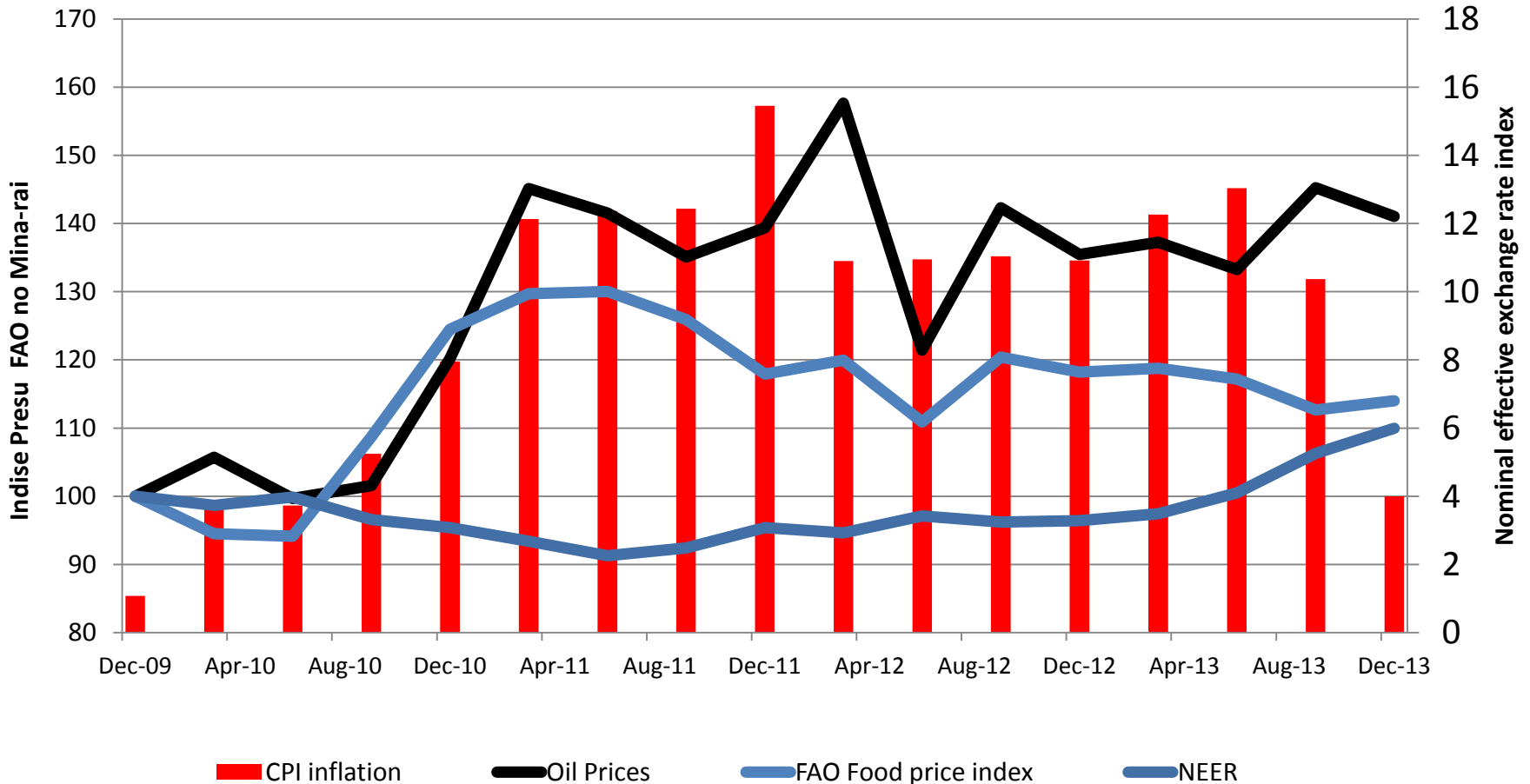


# ITA AGORA IHA NEBE?

Dezenvolvimentu Ekonomia: Fatores Eksternal Kauza Inflasaun –  
Estavel iha 2011-2013 Maibe Inflasaun Boot Nafatin – Evidensia Katak  
Kauza Inflasaun Husi Fatores Domestikas



## Indise Fatores Eksternais (Dez 2009 too Dez 2013)



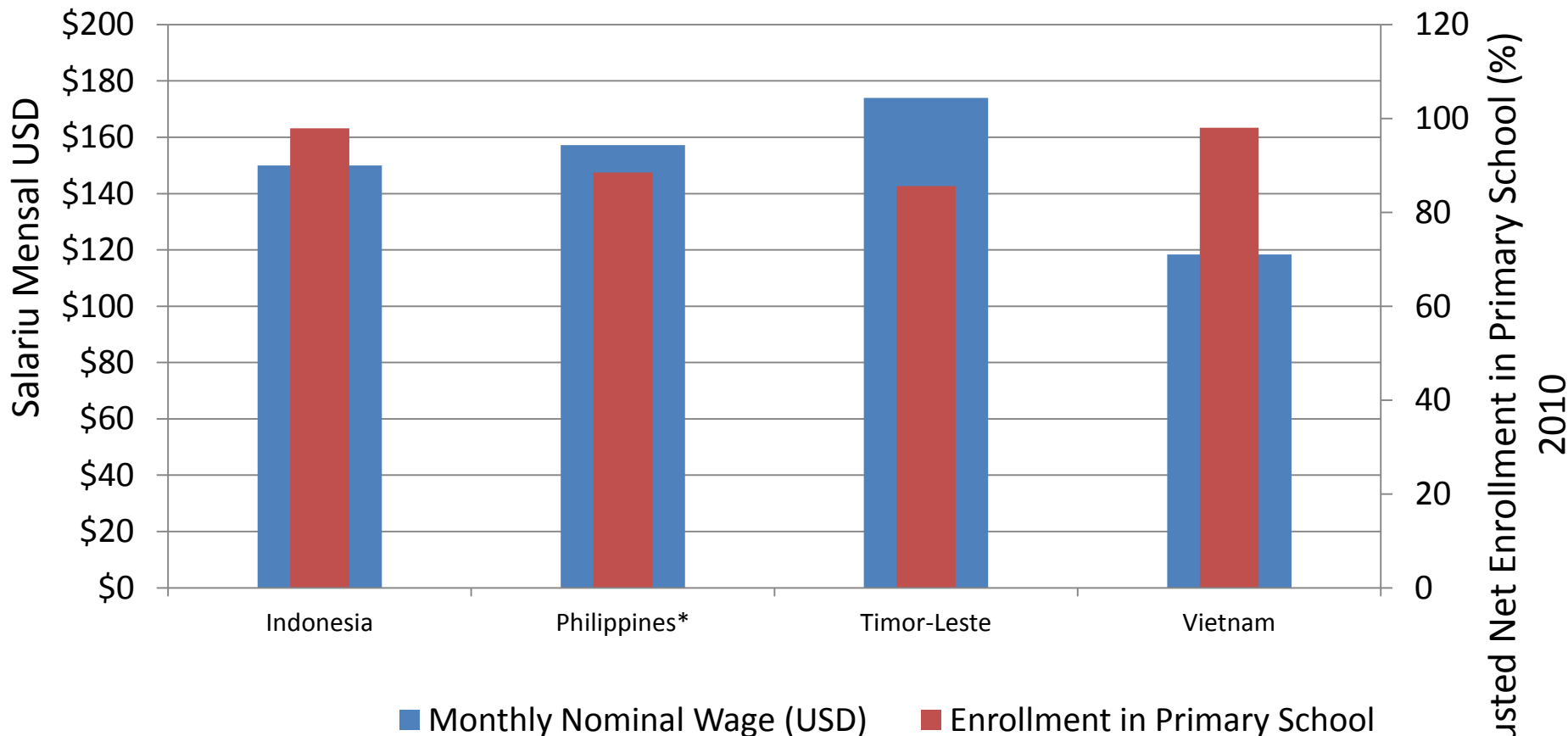


# ITA AGORA IHA NEBE?

Dezenvolvimentu Ekonomia: Inflasaun nebe boot no produtividade nebe ki'ik nudar impedimentus ba investimentu husi setor privadu



## Komparasaun Produtividade ho Salariu

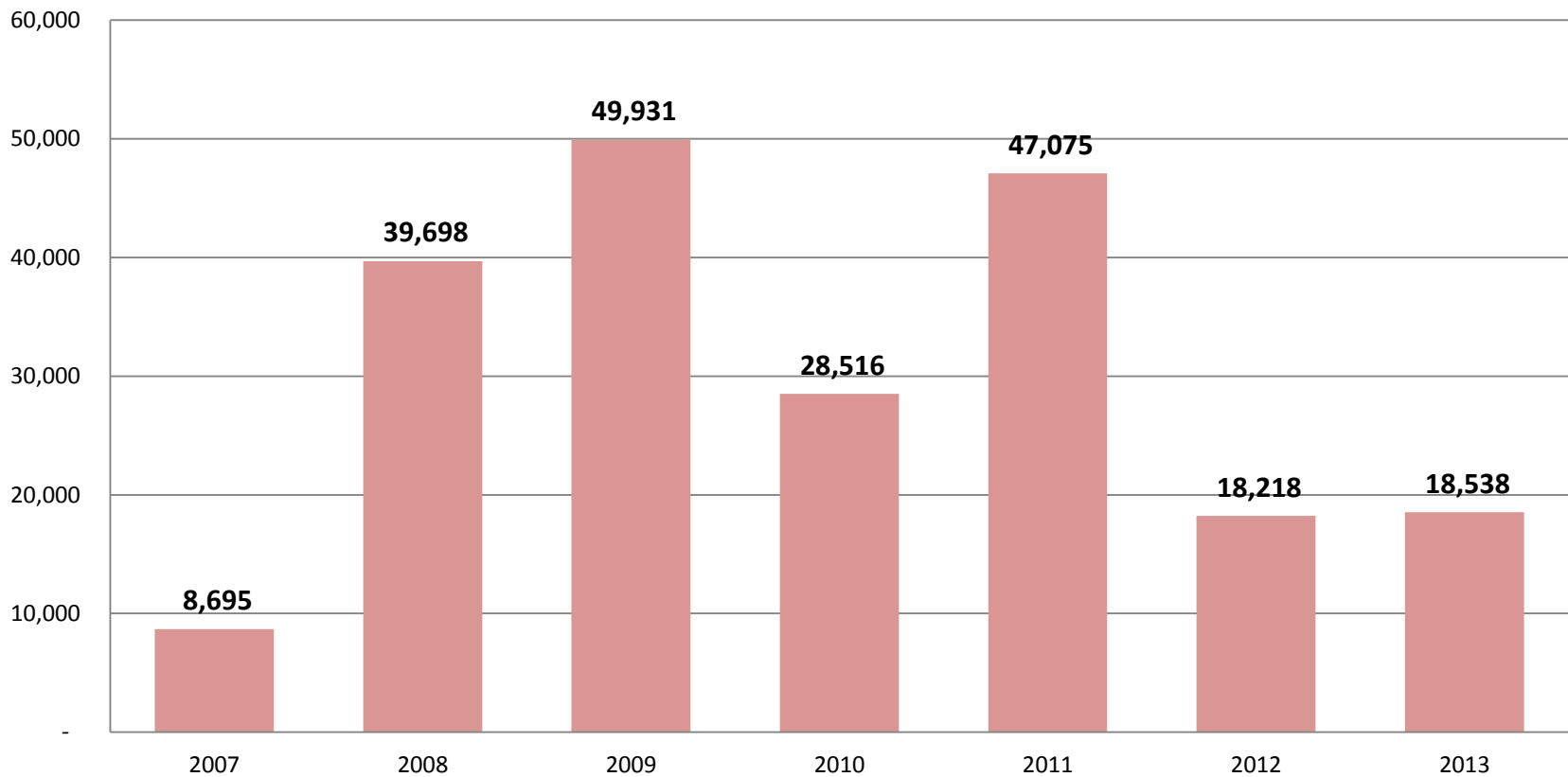


Source: International Labour Organisation and World Bank  
\*Adjusted Net Enrollment in Primary School (%) from 2009



# ITA AGORA IHA NEBE?

Dezenvolvimentu Ekonomia: “Investimentu Eksternu Diretu (FDI)”

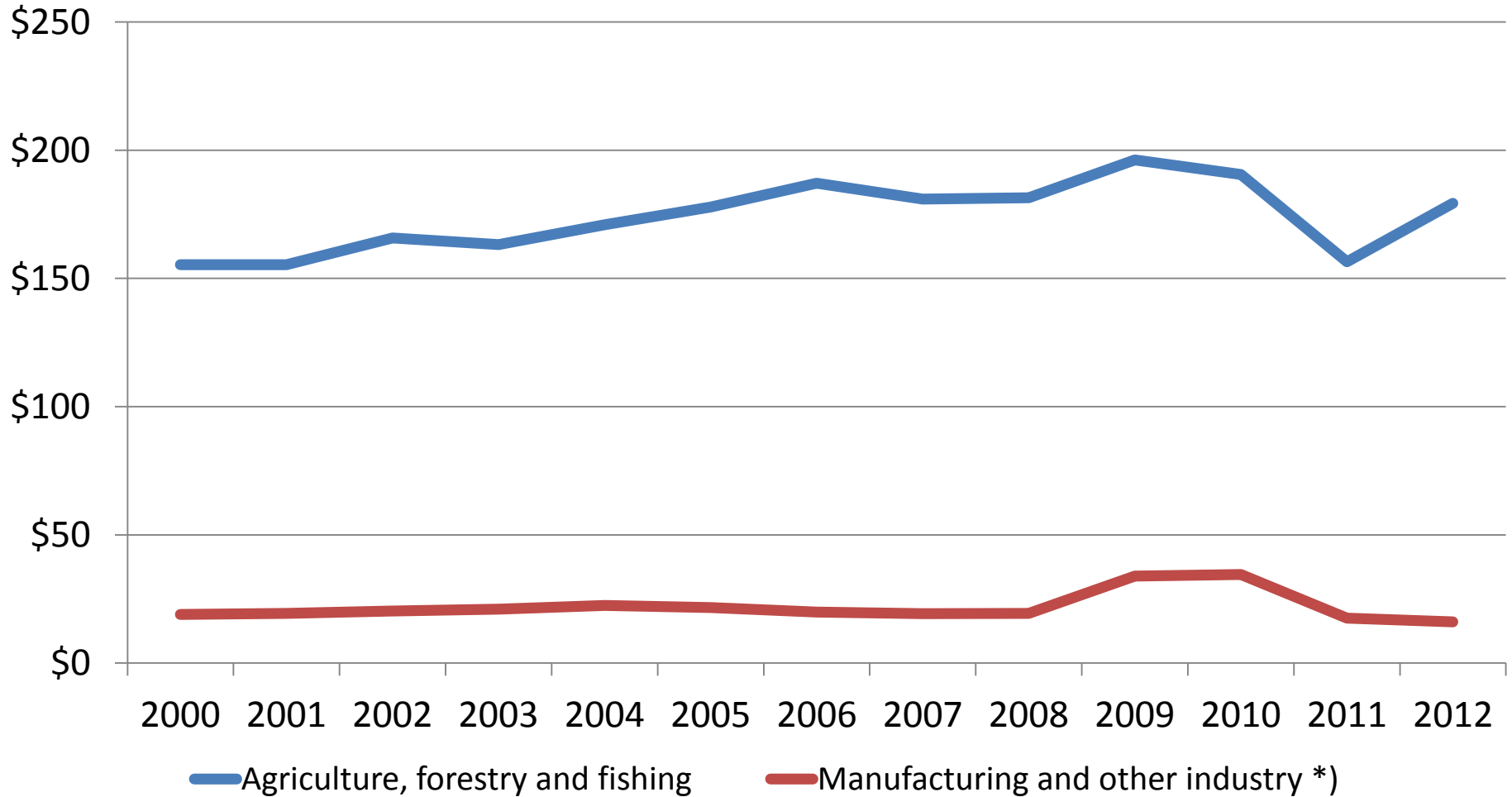


Fonte: Banco Central website



# ITA AGORA IHA NEBE?

Dezenvolvimentu Ekonomia: Kresimentu Setor Manufatura no  
Agrikultura sei ki'ik – Dezafiu ba Kriasaun Kampu Servisu no Aumenta  
Rendimentu Uma Kain  
(USD Tokon)





# ITA AGORA IHA NEBE?

Dezenvolvimentu Ekonomia: Kresimentu iha Setor Manufatura –  
Dezafiu no Esforsu



## Fatores Nebe Dezafia Kresimentu Iha Setor Manufatura

- Kustu trabalhador nebe boot kompara ho sira nia produtividade – tamba edukasaun nebe kiik, konhesimentu nebe oituan, no atitude servisu nebe la kontribui ba produtividade;
- Ambiente investimentu nebe ladun kondusivel;
- Inflasaun boot iha 2011 too 2013 nune halo kustu produsaun ba setor privadu boot;
- Tasa importasaun ka “import duty” nebe kiik nune ladun insentiva industrias domestika;
- Iha potencia barak – maibe seidauk dezenvolve ho maximu

## Esforsu Nebe Halo Ona

- Estabele FDKH iha 2011 ho esperansa atu hadia rekursus umanus iha Timor-Leste
- Hadia klima investimentu – Estabelese SERVE no estabelese FI atu hadia infra-estrutura iha Timor-Leste
- Inflasaun hahu tuun ona iha Q4 2013
- Governu iha komitmentu atu “review” lei tributaria
- Estudu no asaun konkreta balun kona-ba diversifikasaun ekonomia hahu implementa ona.

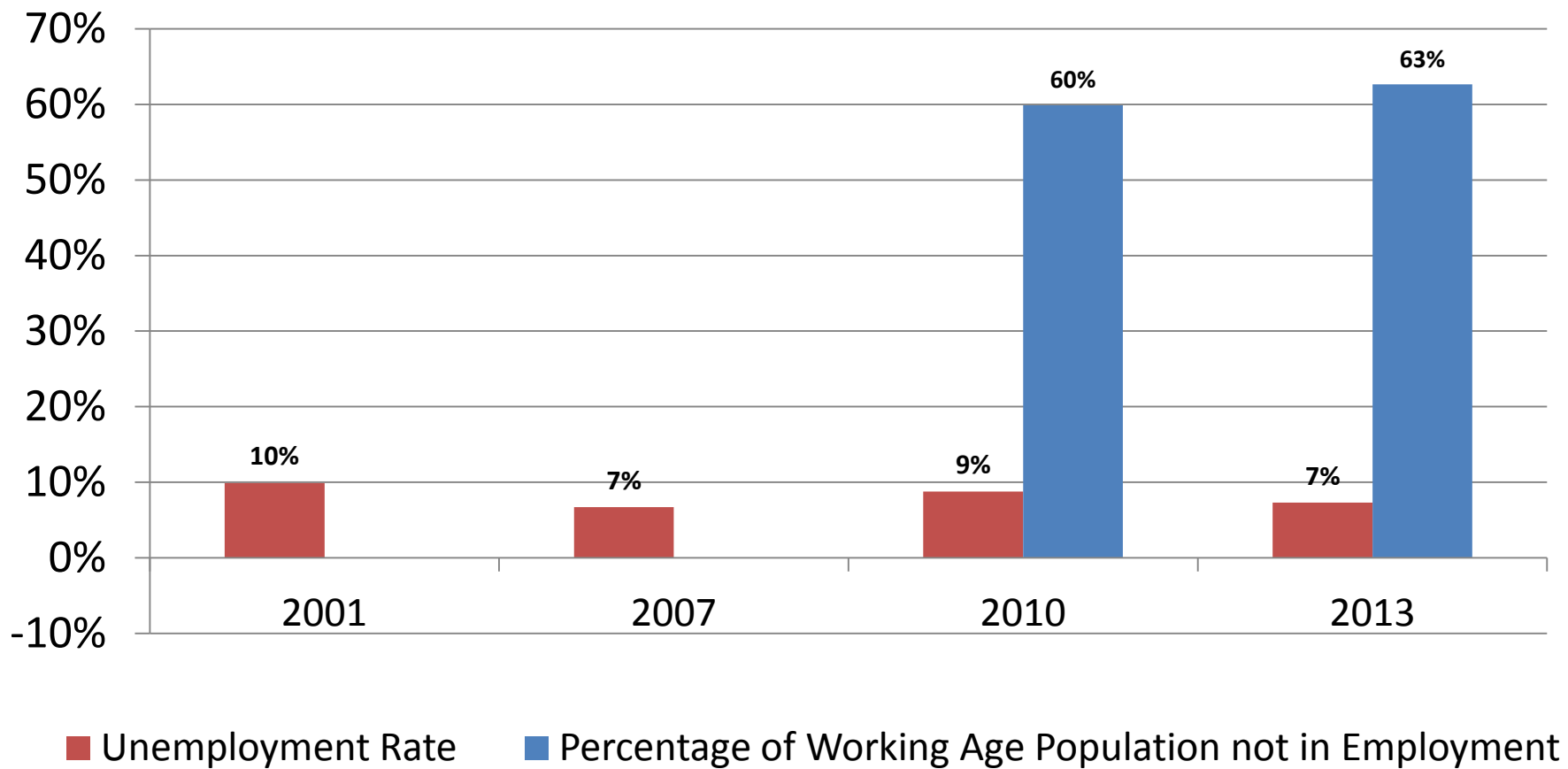




# ITA AGORA IHA NEBE?



Dezenvolvimentu Ekonomia: Populasaun ho tinan apropriadu atu servisu – barak mak la involve iha merkadu trabalhu



Fontes: TLSLS 2001 & 2007 no Timor-Leste LFS 2010 & 2013  
\*13th International Conference of Labour Statisticians Standards

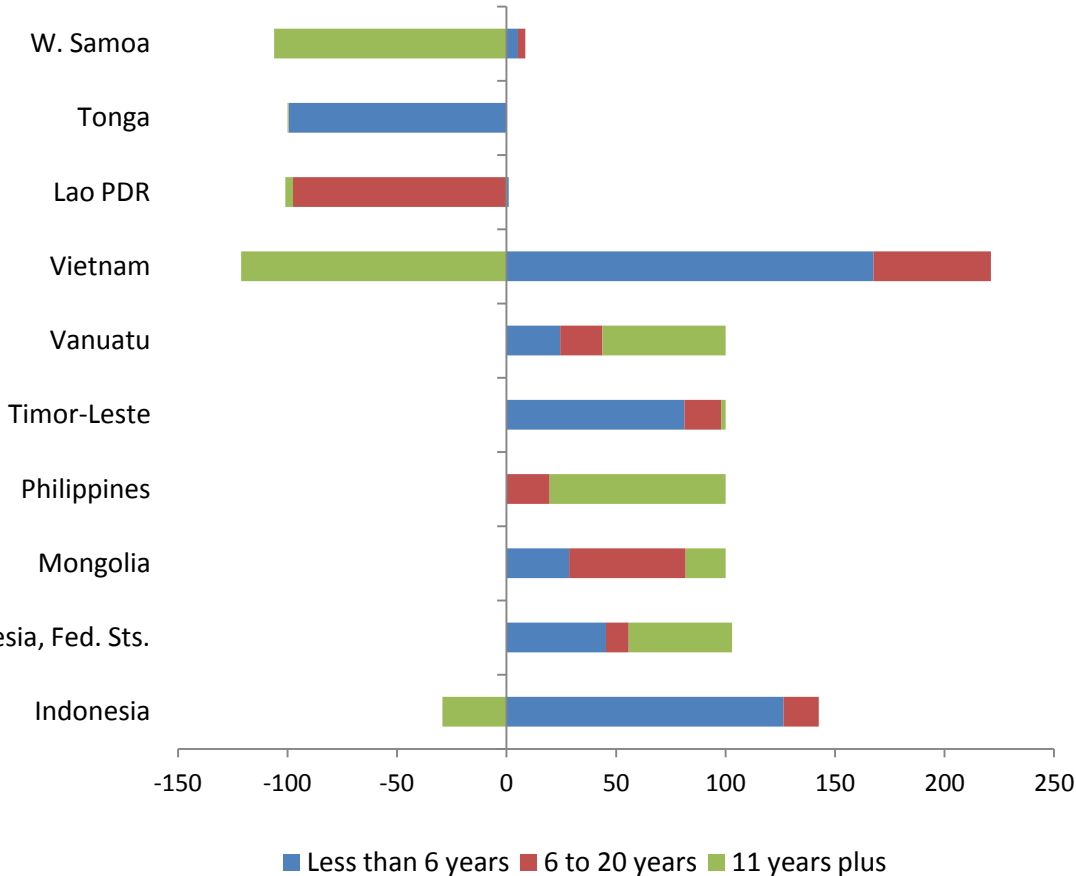


# ITA AGORA IHA NEBE?

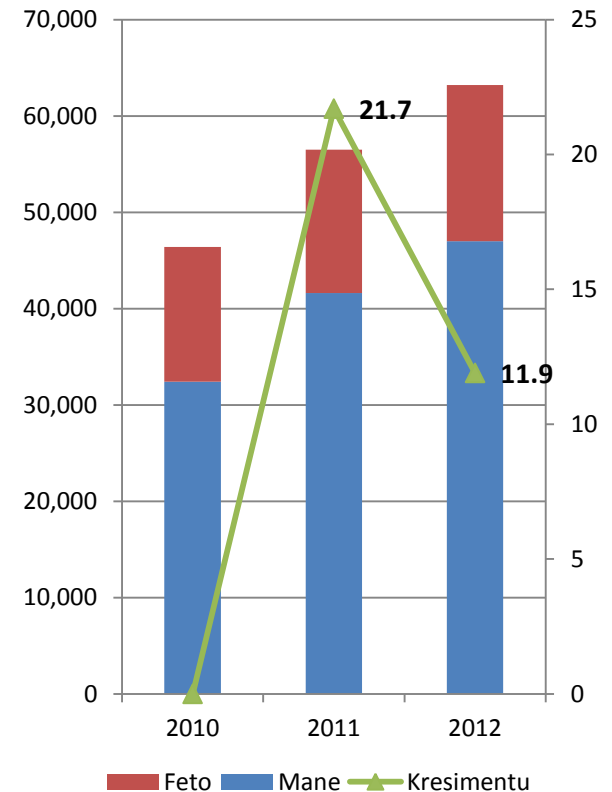
## (1) Dezenvolvimentu Ekonomia: Kriasaun Empregu Husi Setor Privadu



Empregu Kria Husi Setor Privadu (%)



Empregu Kria Husi Setor Privadu Naun-Petroliferu



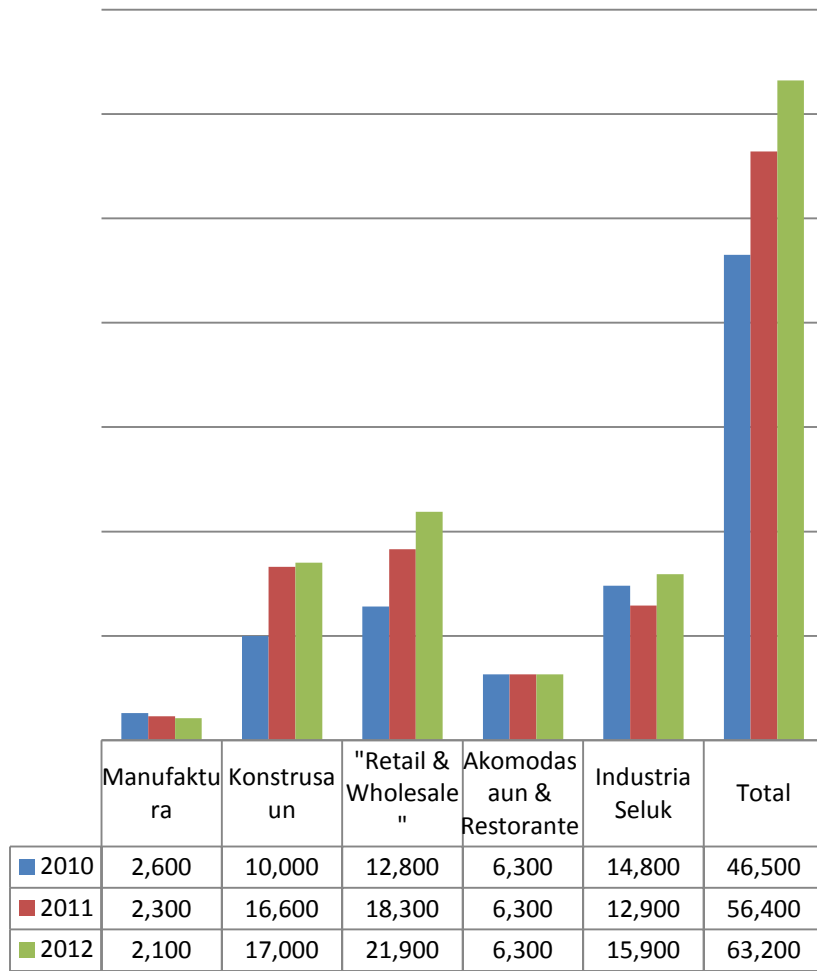


# ITA AGORA IHA NEBE?

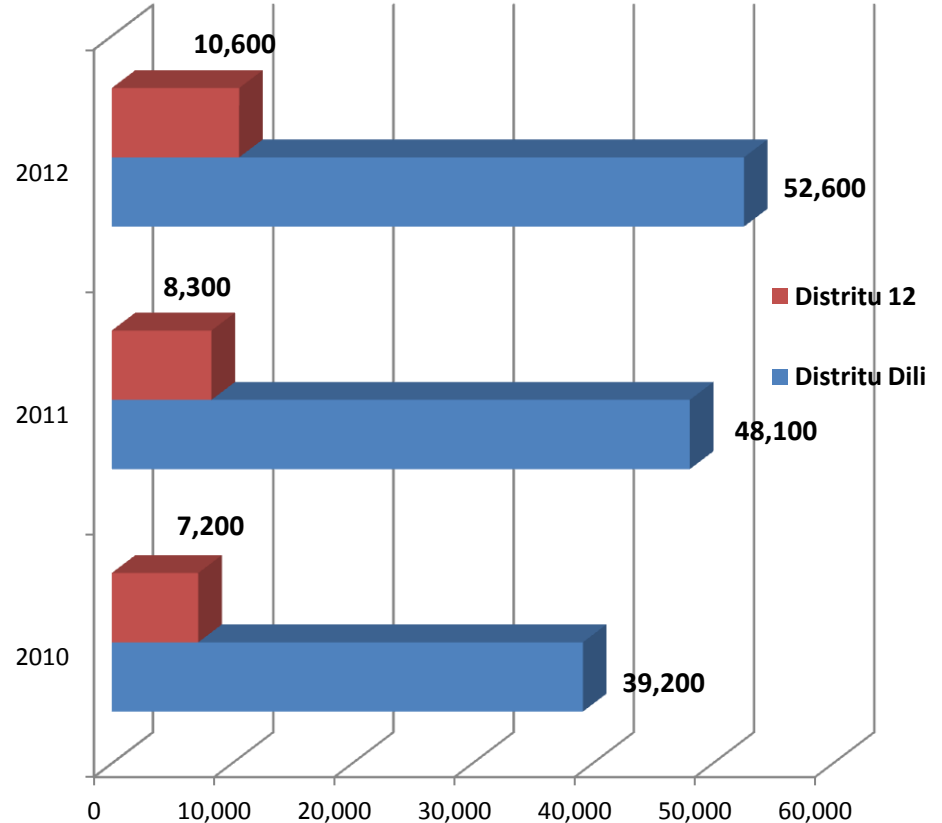
## (2) Dezenvolvimentu Ekonomia: Kriasaun Empregu Husi Setor Privadu



**Kriasaun Empregu Husi Setor Privadu Bazeia ba Industria**



**Kriasaun Empregu Husi Setor Privadu Bazeia ba Distritu**



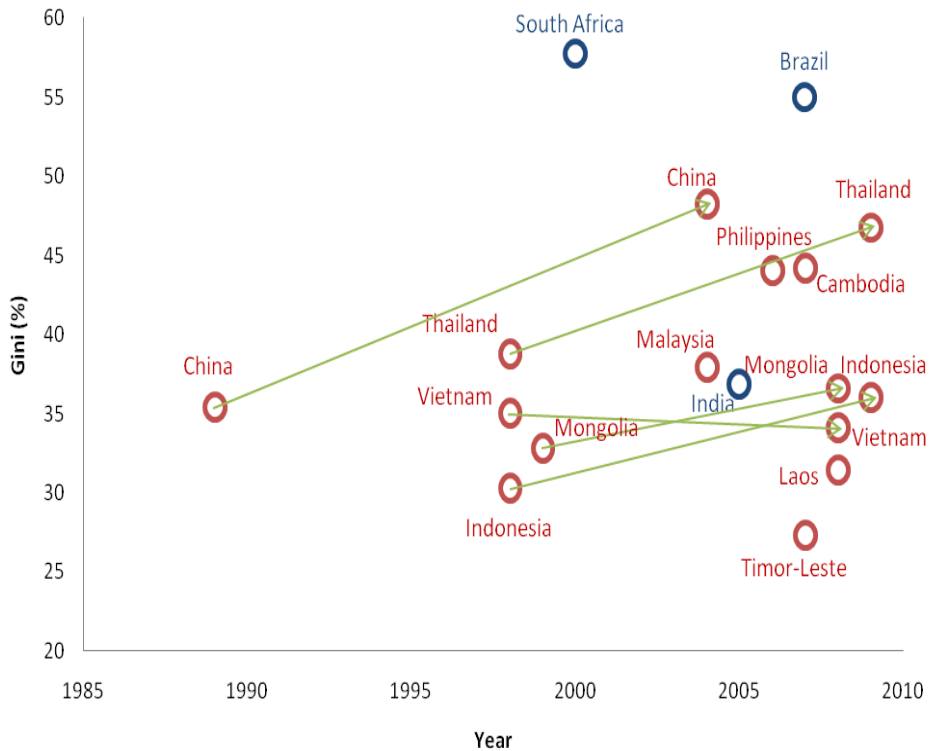


# ITA AGORA IHA NEBE?

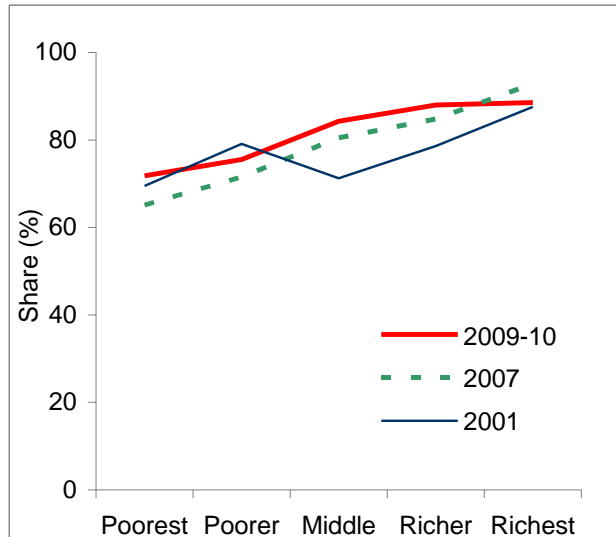
Desenvolvimentu Ekonomia: Se mak benefisia Husi Kresimentu Ekonomiku Nebe Boot



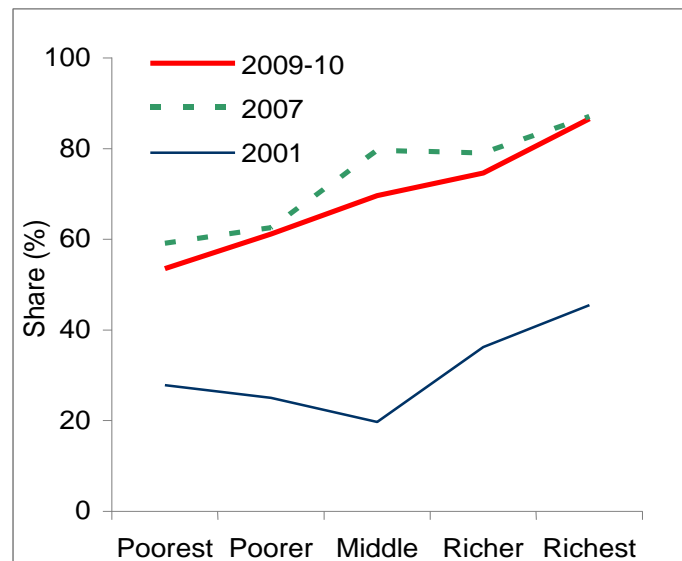
### Inequality in East Asia and Pacific



### Participation rate for 12 to 17 year olds



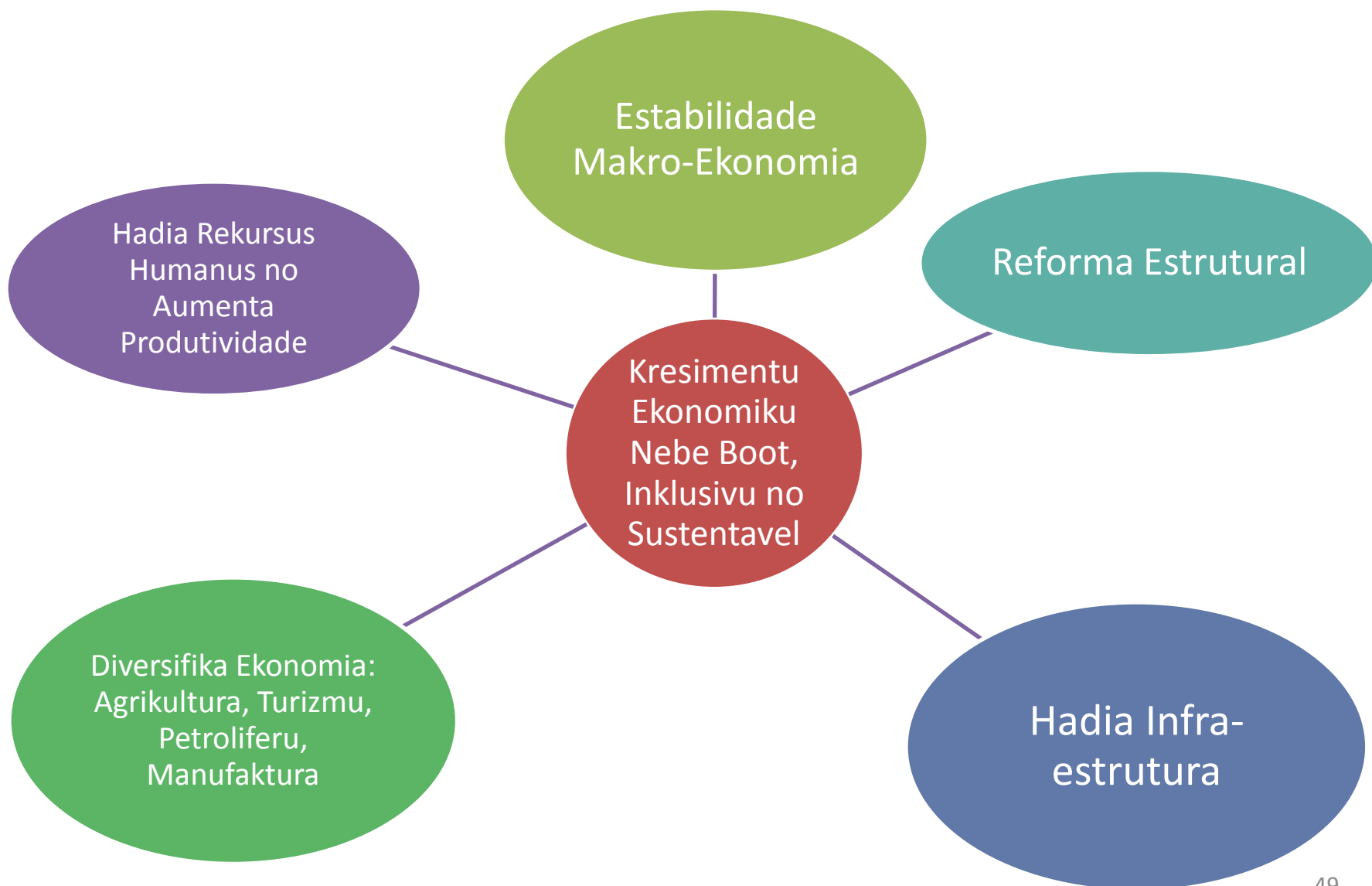
### Under 5 year olds with a BCG shot



Fonte: Banku Mundial

Fonte: ADB

## (1) Dezenvolvimentu Ekonomia: Estratejia Atu Iha Kresimentu Ekonomiku Nebe Boot, Inklusivu no Sustentavel





# ITA AGORA IHA NEBE?



## (2) Dezenvolvimentu Ekonomia: Estratejia Atu Iha Kresimentu Ekonomiku Nebe Boot, Inklusivu no Sustentavel

### ESTABILIDADE MAKRO EKONOMIA

#### •Asegura Katak Politika Fiskal Sustentavel:

Tamba setor privadu duvida atu investe se karik iha tempu naruk despeza no demanda governu la sustentavel

#### •Inflasaun Moderada:

Timor-Leste hahu iha inflasaun nebe kiik (Q4 2013), importante atu mantein inflasaun entre 4%-6%

### REFORM ESTRUTURAL

- **Objetivu:** Atu halo ambiente negosiu iha Timor-Leste sai atrativu liu tan.
- **Politika Atu Halo Ferforma Estrutural**
  - SERVE (One Stop Shop)
  - Presiza Lei ba Rai (Kolateral)
  - Lei investimentu
  - Lei tributaria



# ITA AGORA IHA NEBE?



## (3) Dezenvolvimentu Ekonomia: Estratejia Atu Iha Kresimentu Ekonomiku Nebe Boot, Inklusivu no Sustentavel

### IHA KOMITMENTU ATU KONTINUA HADIA INFRA-ESTRUTURA NO REKURSUS UMANUS:

- Objektivu: Atu hatuun kustu produsaun, risku no aumenta produtividade
- Infra-estrutra: Estarada, eletrisidade (Jestaun O&M), portu, aeroportu, be mos
- Rekursus Umanu: asesu ba edukasaun, kualidade edukasaun no edukasaun nebe orienta ba “demand and supply”

### DIVERSIFIKA EKONOMIA:

- Dezenvolve Setor Agrikultura: tamba iha potencia (maibe tenki bazeia ba vantajen komparativu), populasaun barak (liu-liu iha areas rurais) mak sei depende ba setor ida nee, no Agrikultura nudar setor ho karakter “labor intensive.” no SME
- Dezenvolve Setor Turismu: tamba iha potencia, labor intensive no ho natureza SME;
- Dezenvolve Setor Petroliferu: liu-liu industria downstream
- Dezenvolve Setor Manufaktura: transformasaun ekonomia no “labor intensive”
- Dezenvolve SME: Tamba sei halo ekonomia ho aliserse nebe metin, labor intensive.



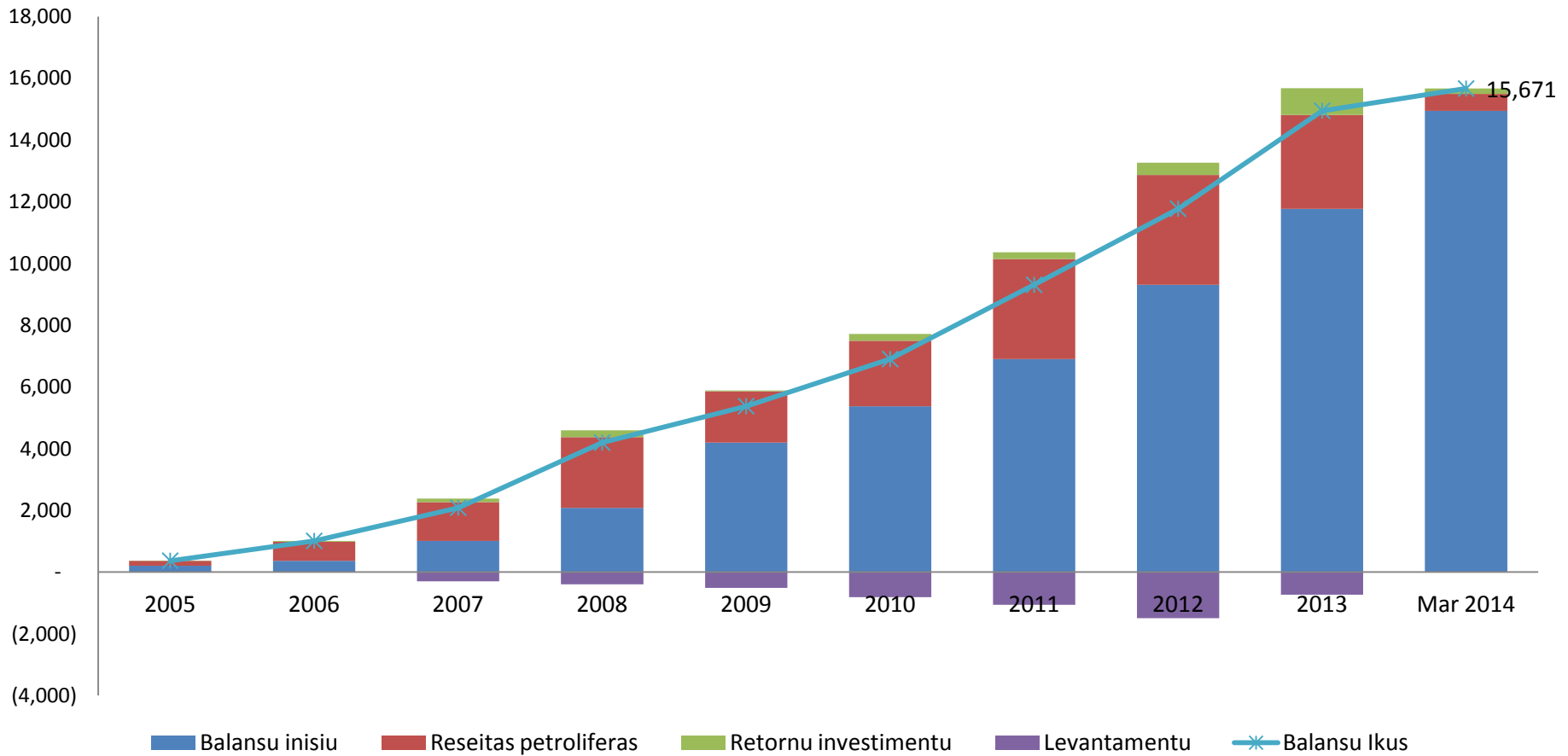


# ITA AGORA IHA NEBE?

Aprezentasaun 5 :  
Jestaun Fundu Petroliferu

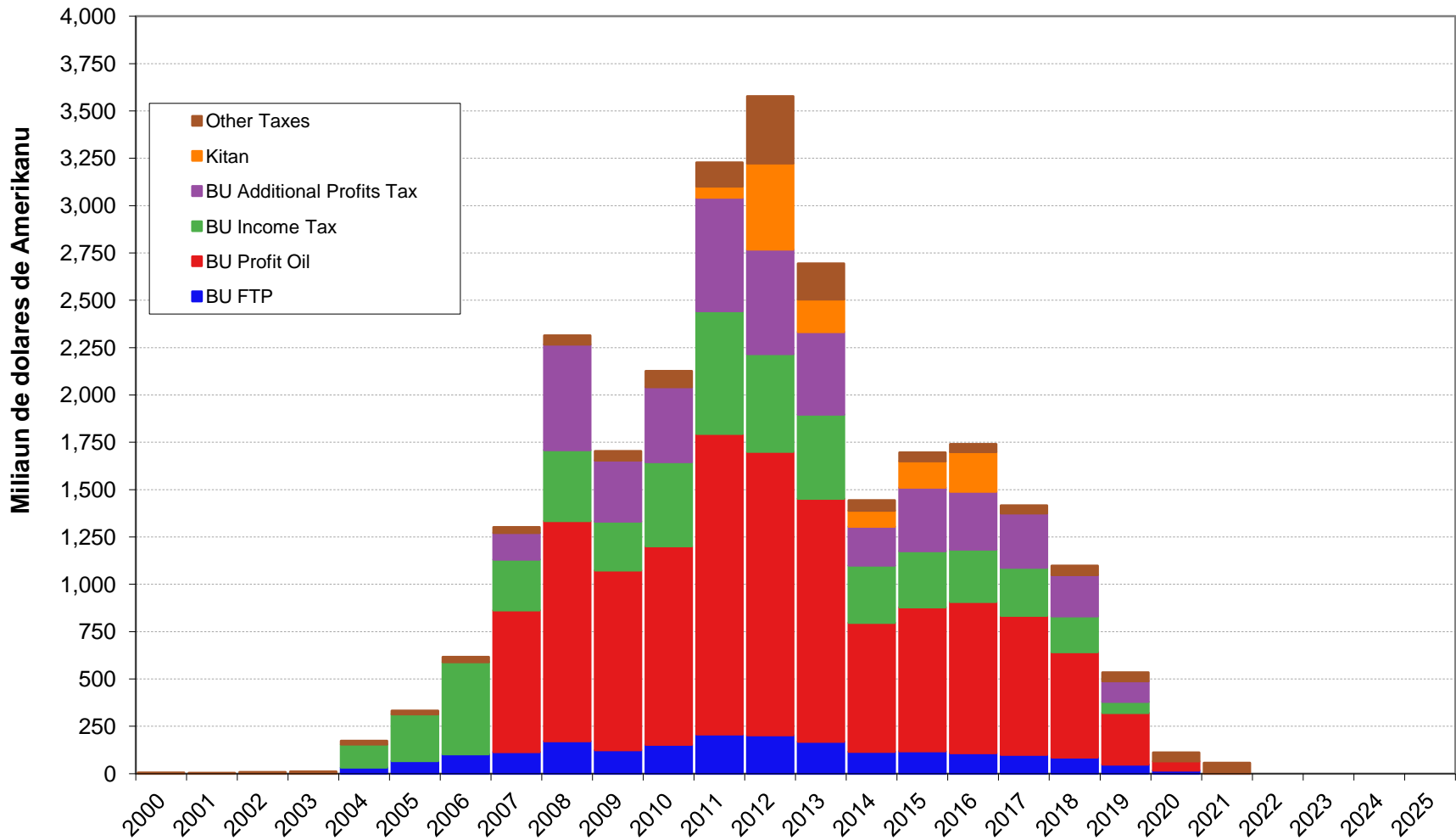
# ITA AGORA IHA NEBE?

Fundu Petroliferu: Balansu Fundu Petroliferu Aumentu Kada Tinan.



# ITA AGORA IHA NEBE?

## Fundu Petroliferu: Reseitas Fundu Mina-rai



Source: NDPF and BU 2013

•Figura 2013-2022 bazea ba kalkulasaun no asumpsau iha Orsamentu 2014. Kalkulasaun atualizadu (updated calculation) sei halo iha fulan Agostu 2014 ba Orsamentu 2015.



# ITA AGORA IHA NEBE?

## Fundu Petroliferu: Diversifikasaun Investimentu Fundu Petroliferu no Jestores



Tempu

2009

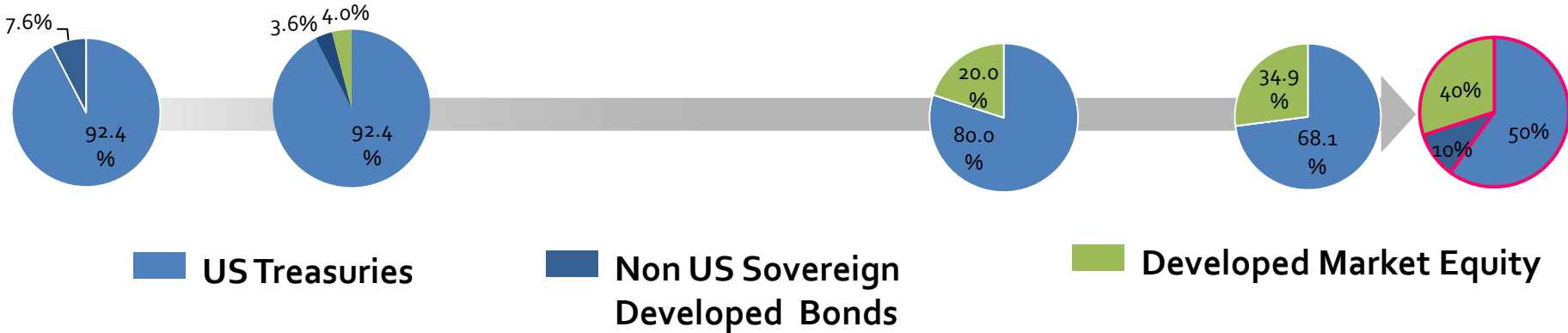
2010

2011

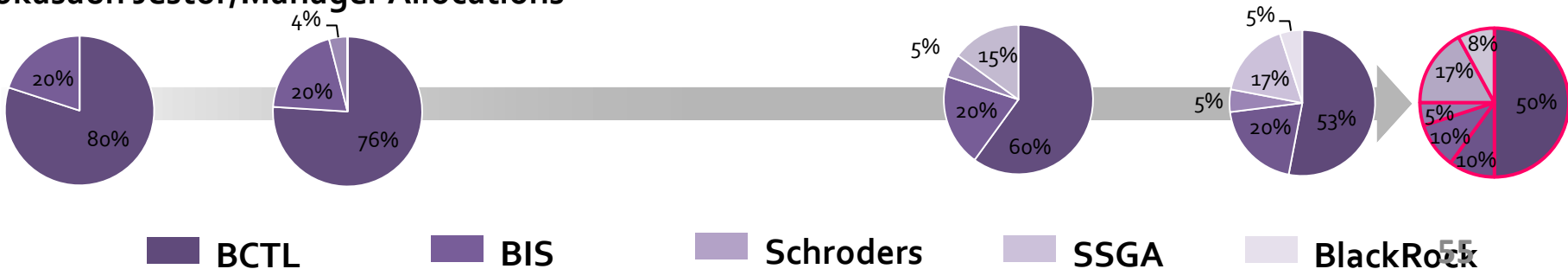
2012

2013

### Alokasaun Ativu/Asset Allocations

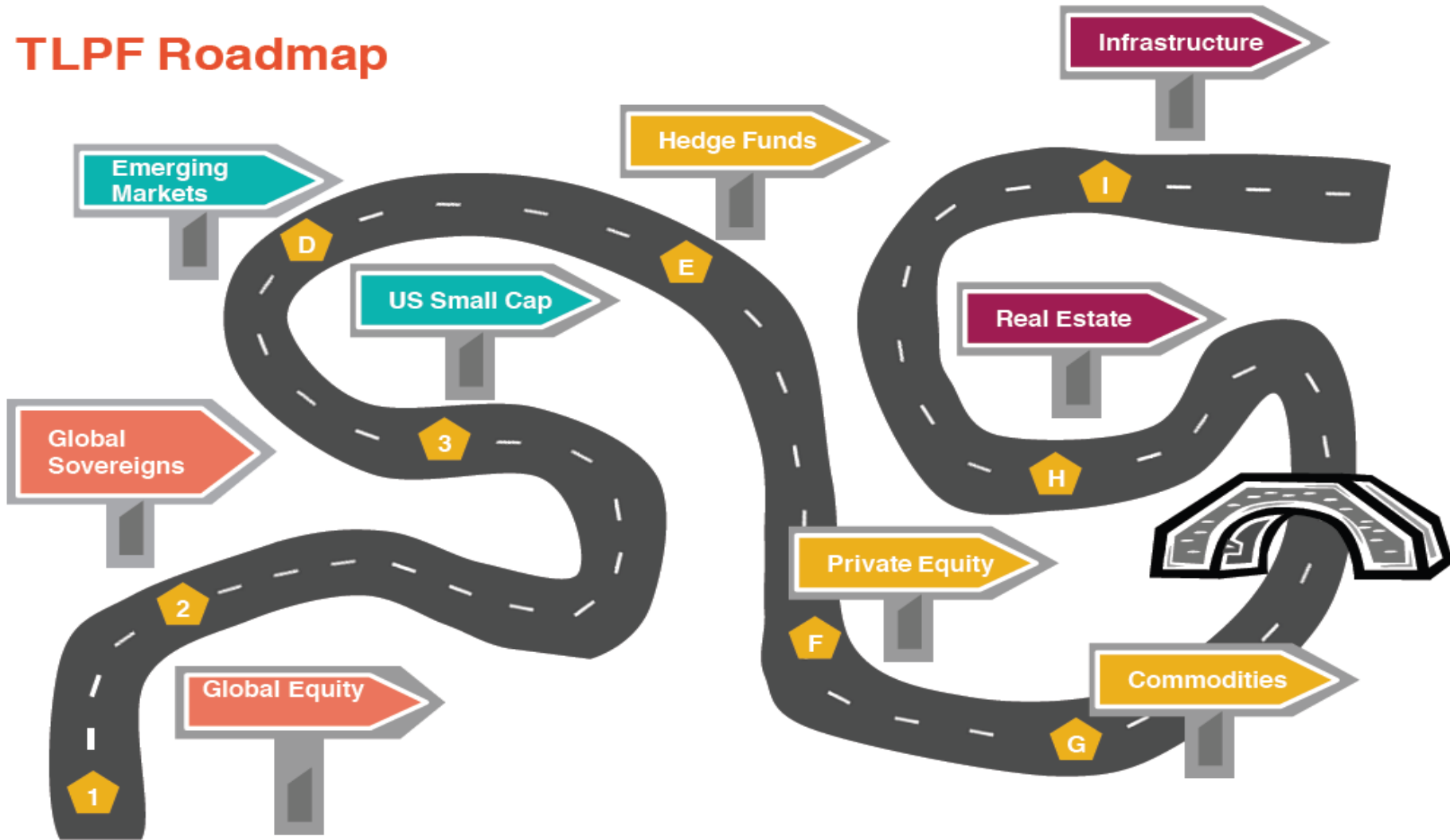


### Alokasaun Jestor/Manager Allocations



## Fundu Petroliferu: Prosesu no Estratejia Investimentu FP iha Futuru

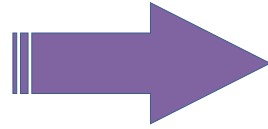
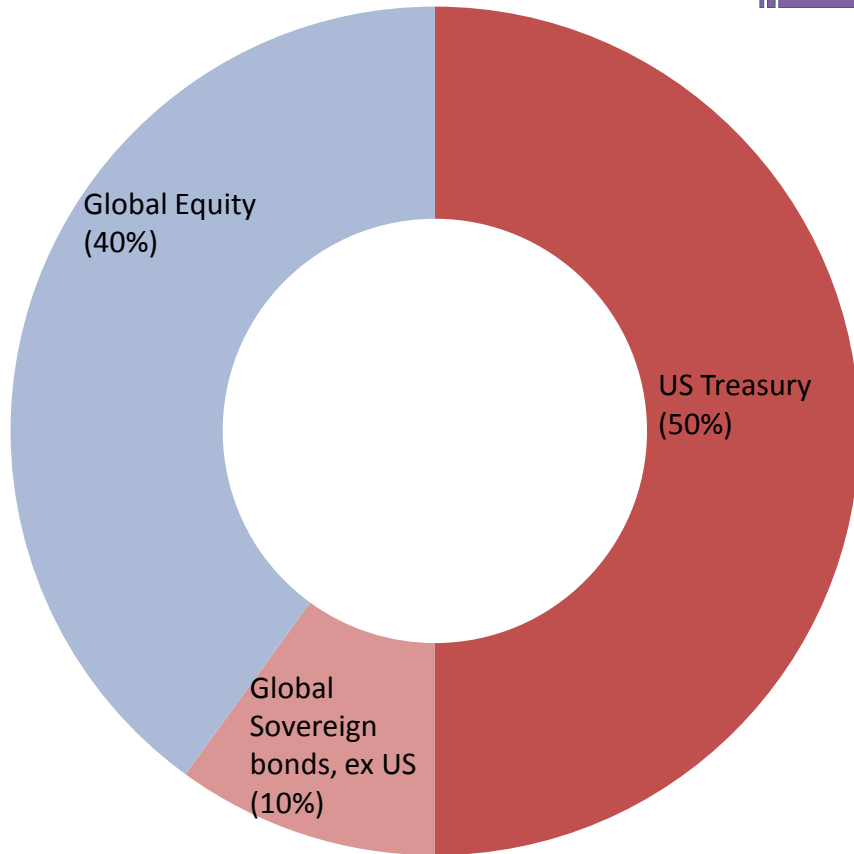
### TLPF Roadmap



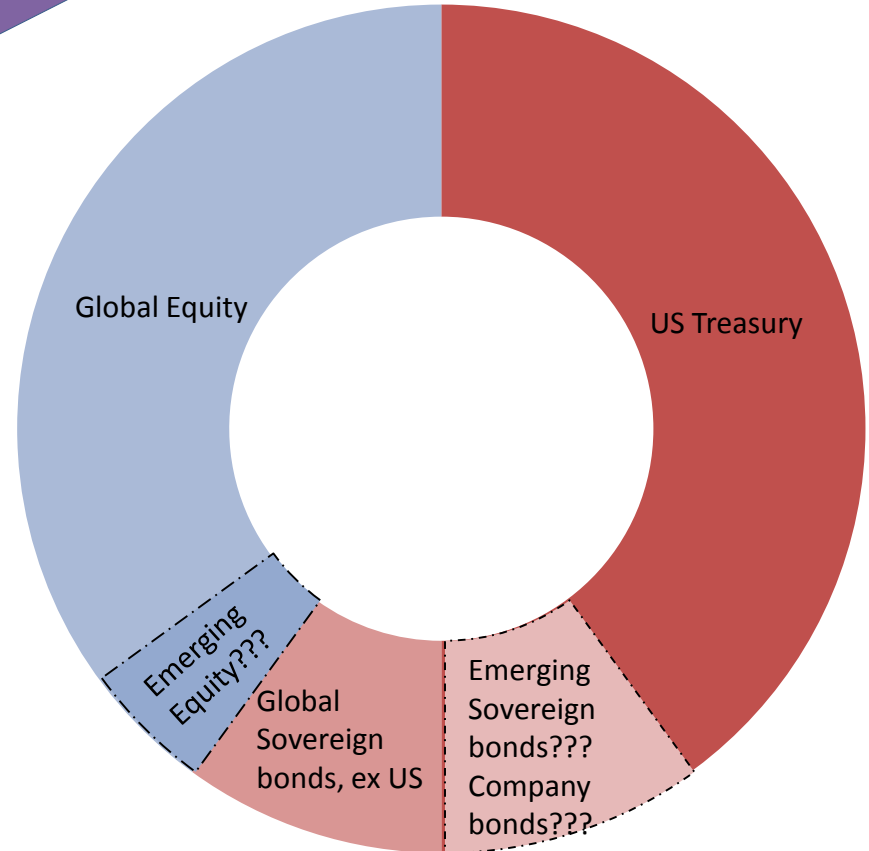
# ITA AGORA IHA NEBE?

Fundu Petroliferu: Distribuisaun ba Investimentu FP Iha Futuru Seidauk Deside

June 2014



Ba futuru..?



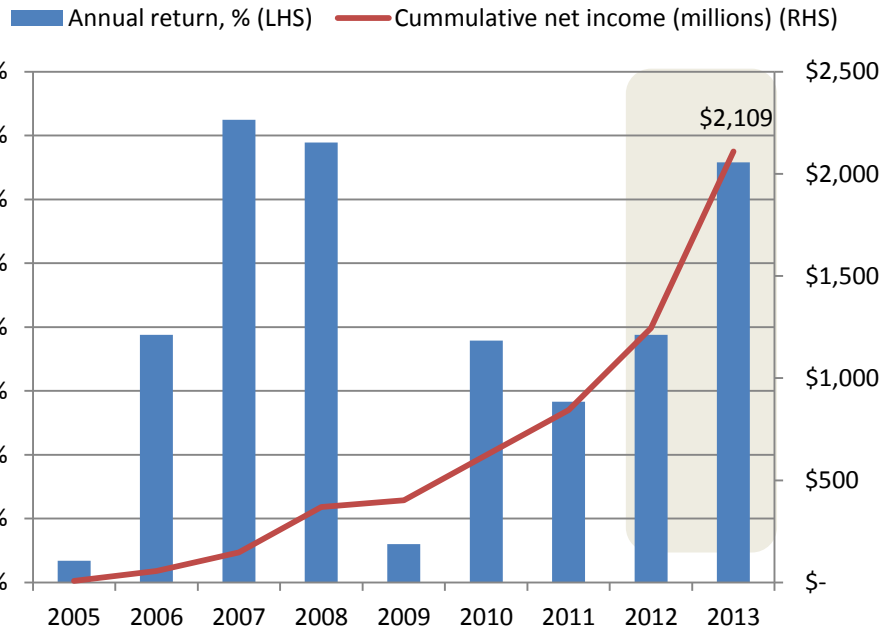


# ITA AGORA IHA NEBE?

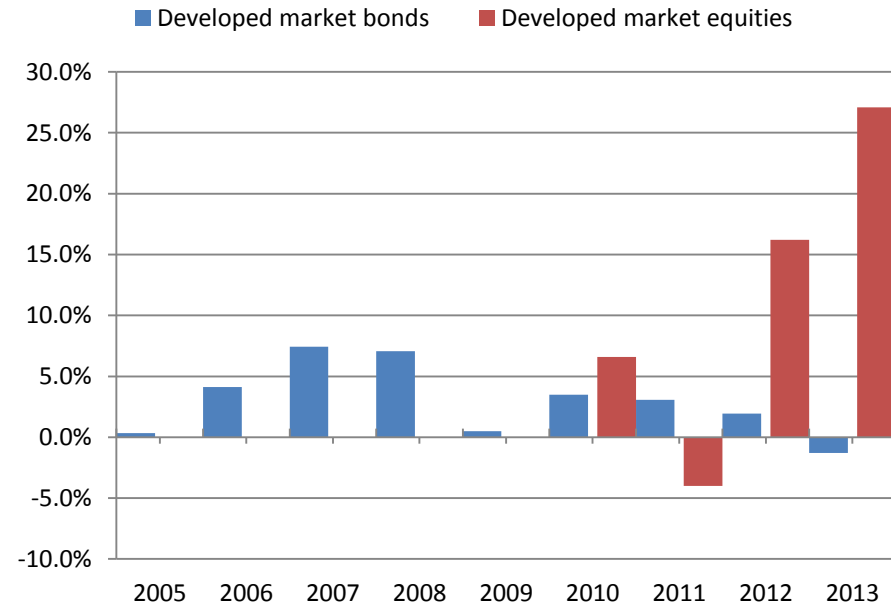
## Fundu Petroliferu: Dezenpenhu Investimentu FP



### Retornu Investimentu Likidu FP



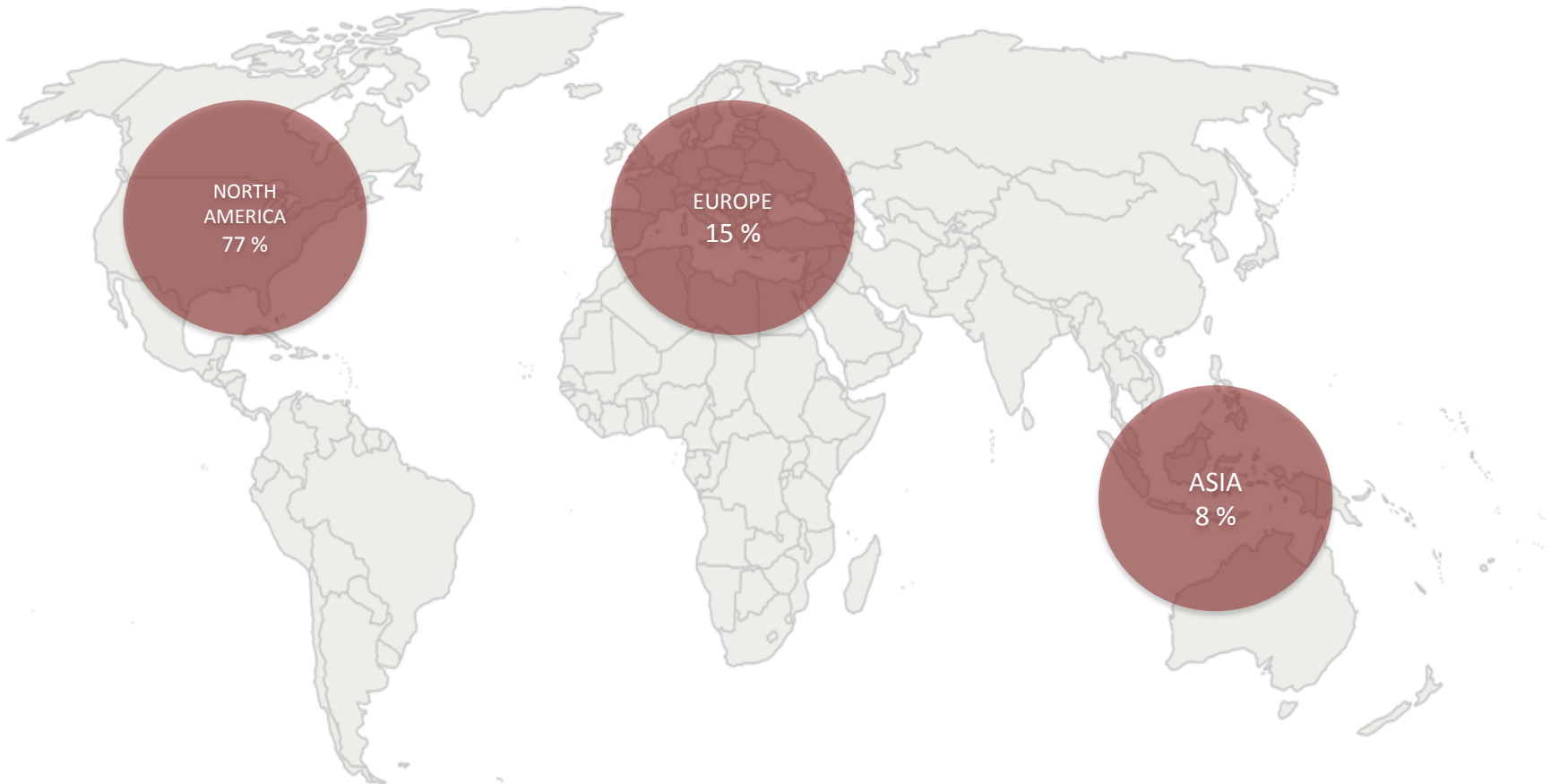
### Kontribuisaun Tuir Alokasaun Ativu



Diversifikasaun hanesan xave atu jere risku..

# ITA AGORA IHA NEBE?

## Fundu Petroliferu: FP Investe Iha Nebe?



(Investimentu FP iha 31 Dezembru 2013)





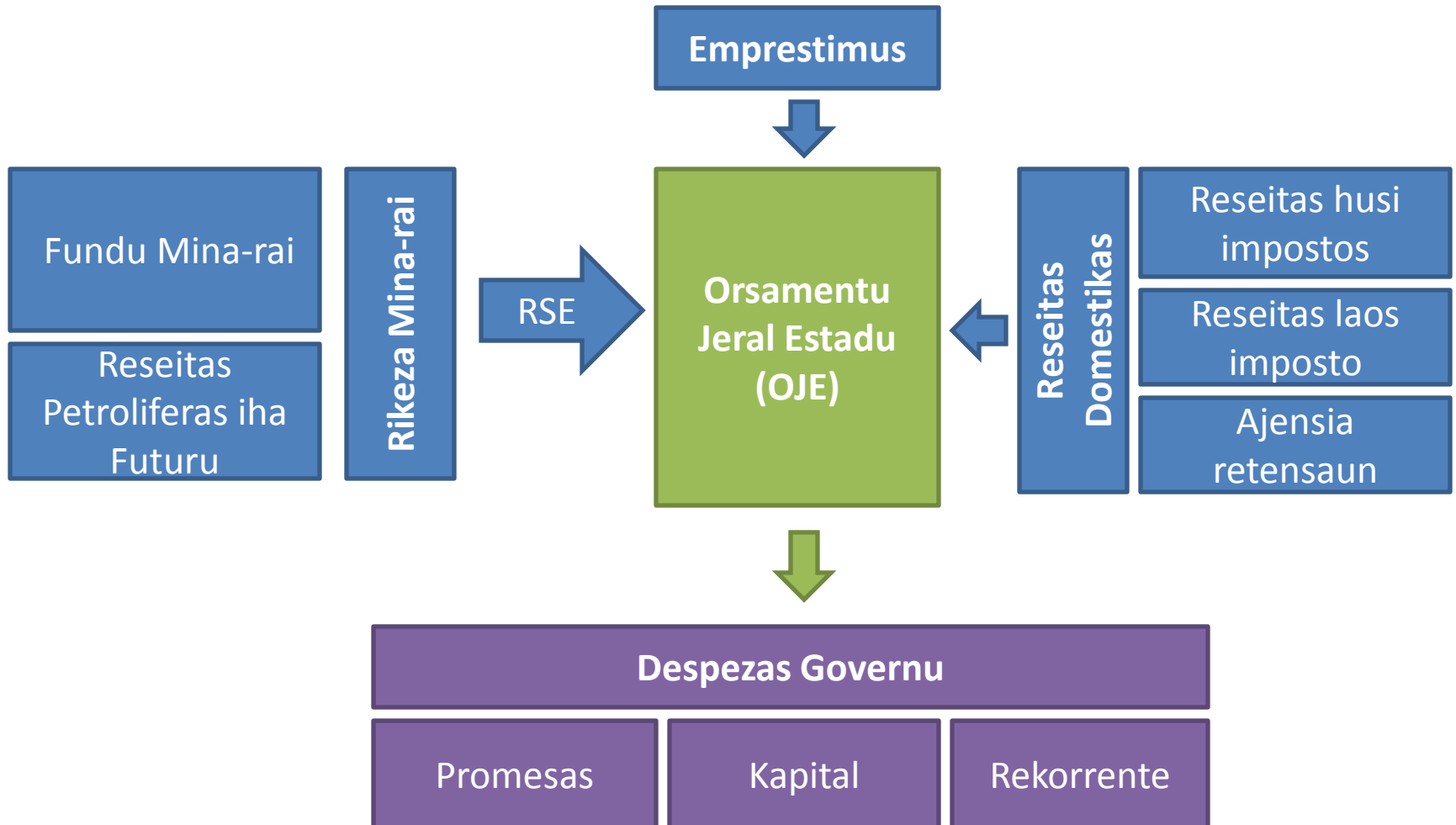
# ITA AGORA IHA NEBE?

Aprezentasaun 6 :  
Revizaun Despeza Publika



# ITA AGORA IHA NEBE?

Panoramika Orsamentu Timor-Leste





# ITA AGORA IHA NEBE?

## Formula Sustentabilidade Fiskal ba Timor-Leste



### Despezas

- Rekorente
- Kapital
- Promesas (inklui selu emprestimu)

= <

### Reseitas & Finansiamentu

- Reseitas Domestikas
- Rikosoim Mina-rai
- Emprestimu

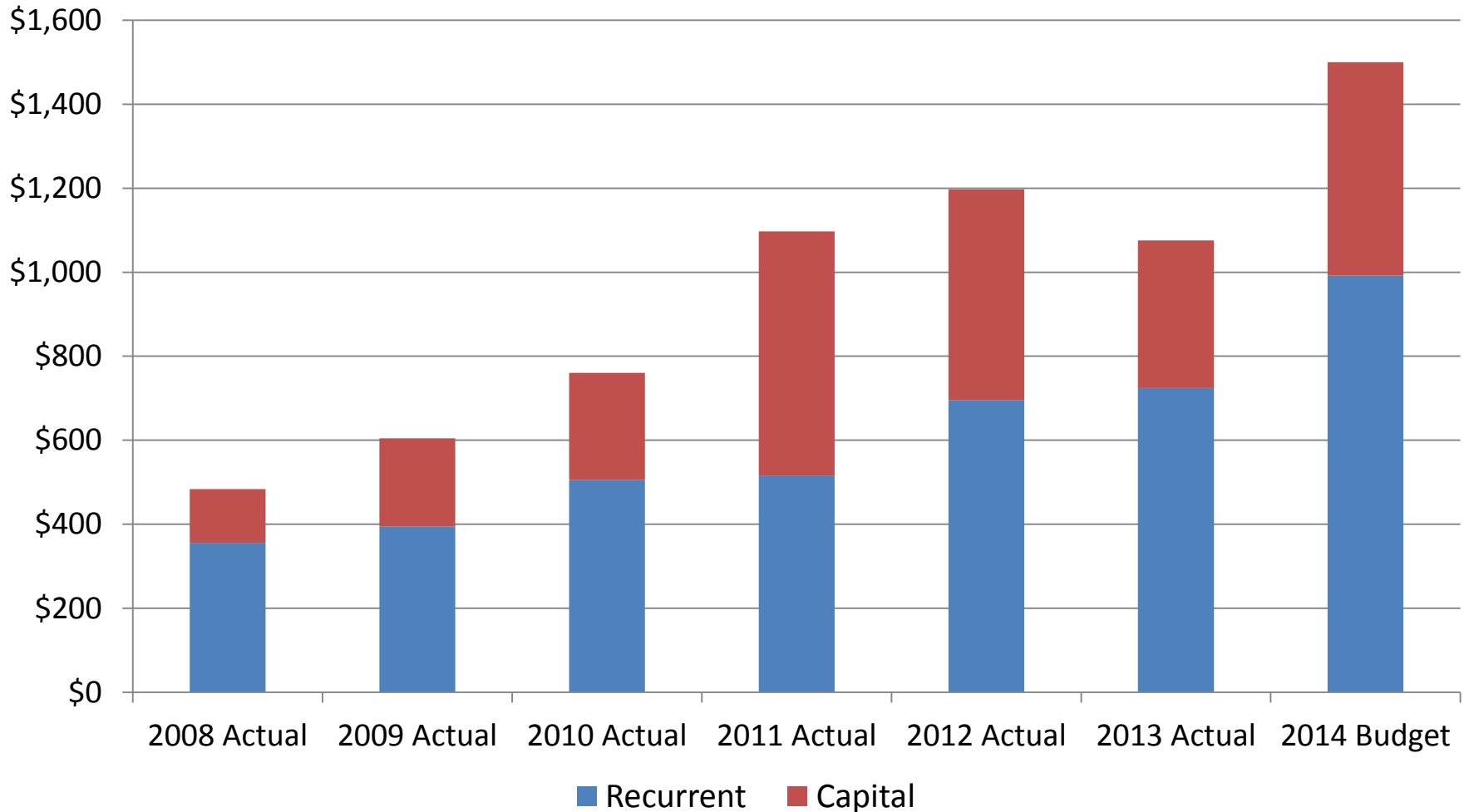


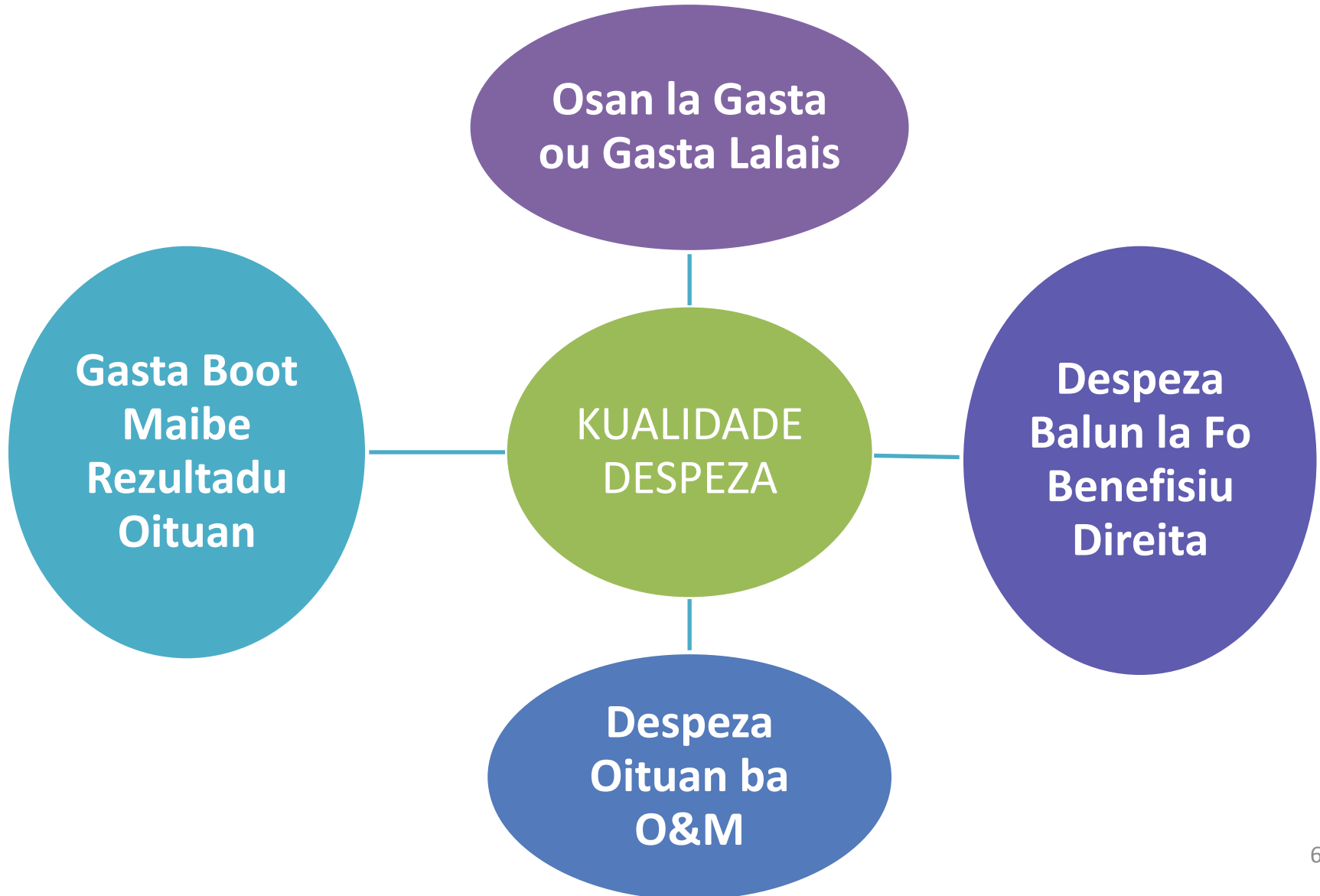
# ITA AGORA IHA NEBE?

Revizaun Despeza Publika: Orsamentu no Despeza Atual Domina  
Husi Despeza ba “Rekorente”



(USD Tokon)







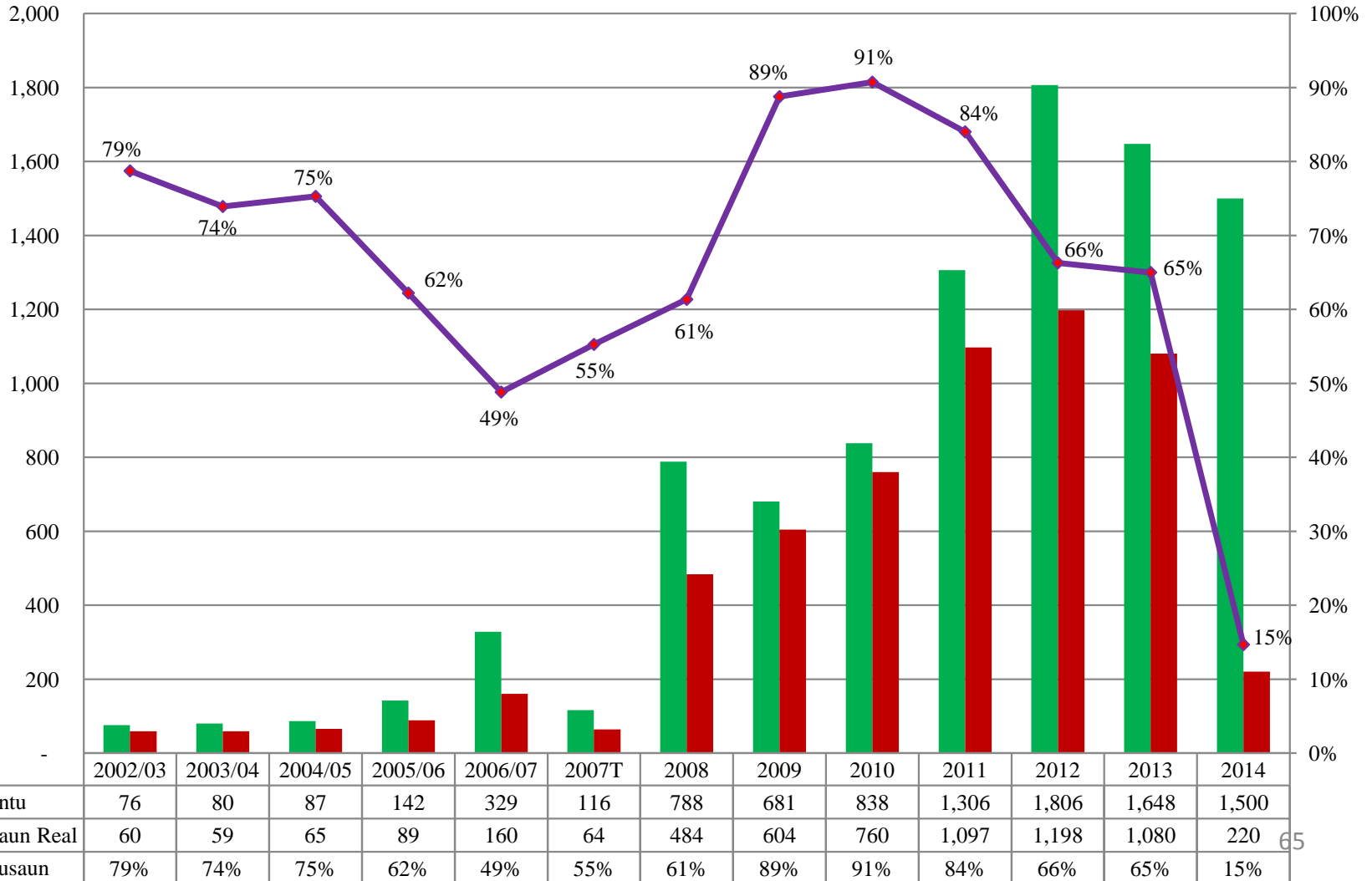
# ITA AGORA IHA NEBE?

## Revizaun Despeza Publika: Orsamentu vs Ezekusaun



Data 19-Maiu 2014

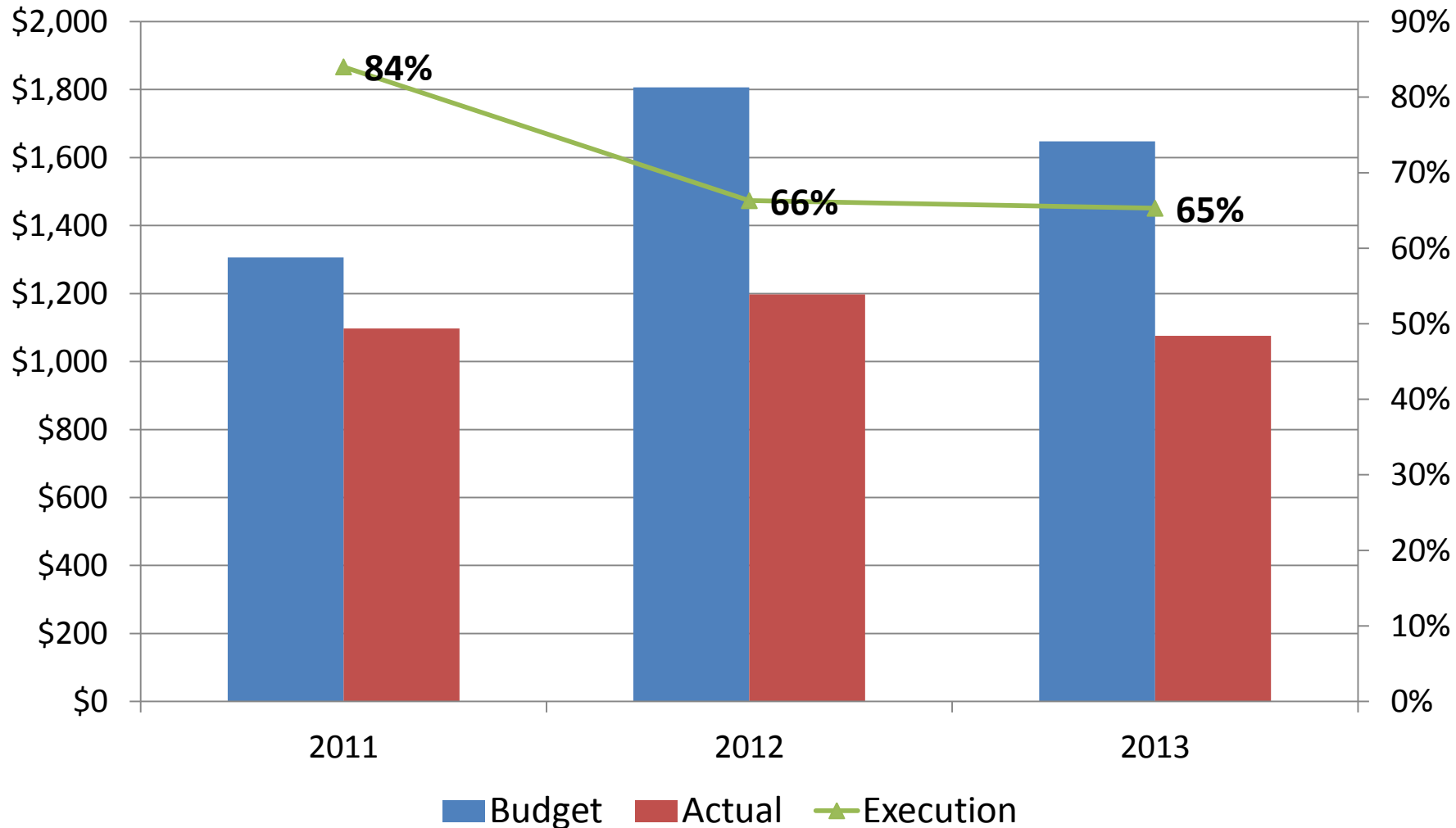
USD Tokon



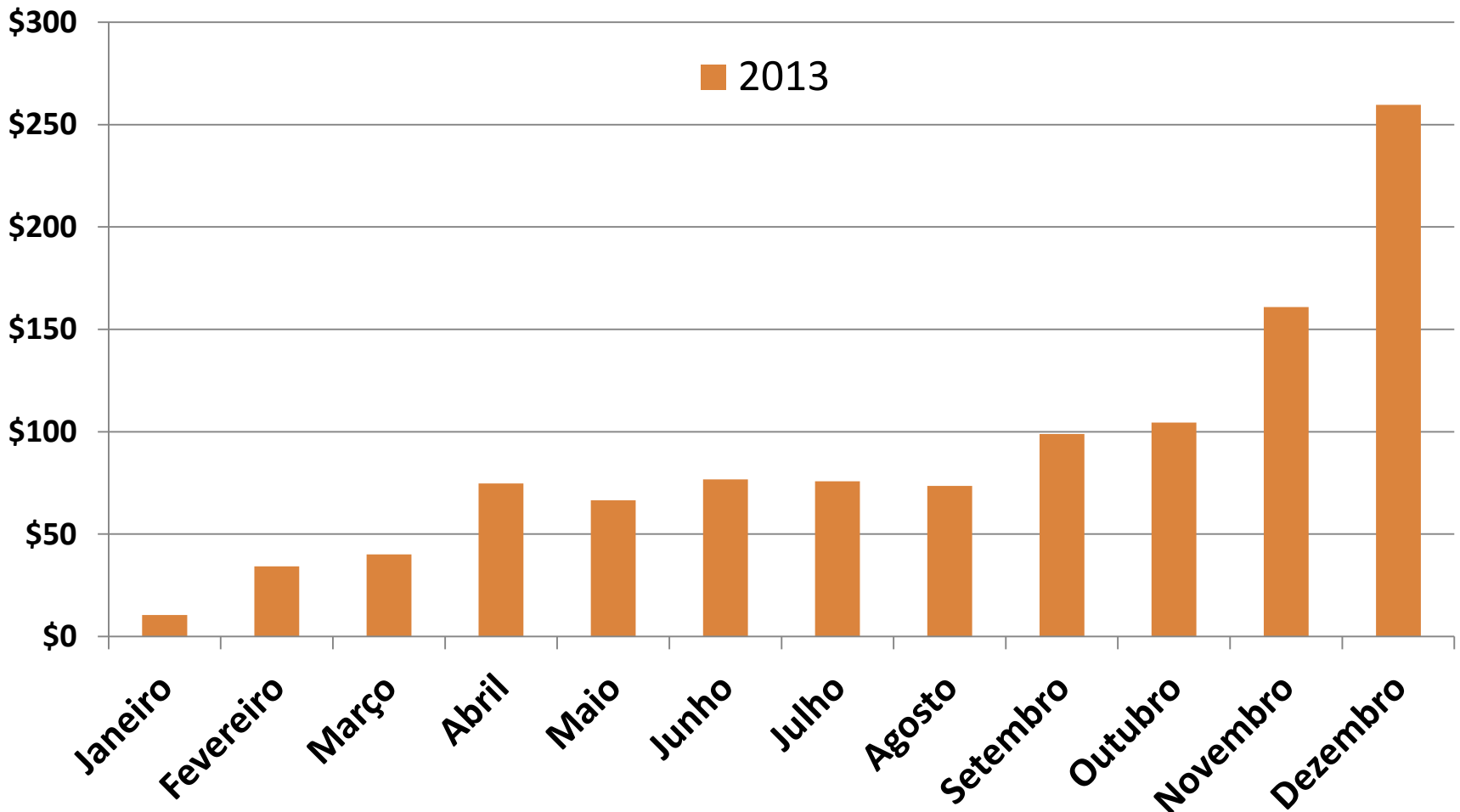


# ITA AGORA IHA NEBE?

Revizaun Despeza Publika: Osan la Gasta – Ezekusaun  
Kiik Tamba Ezekusaun Kiik Iha Fundu Infra-Estrutura



### Despeza Kada Fulan (Tokon USD)





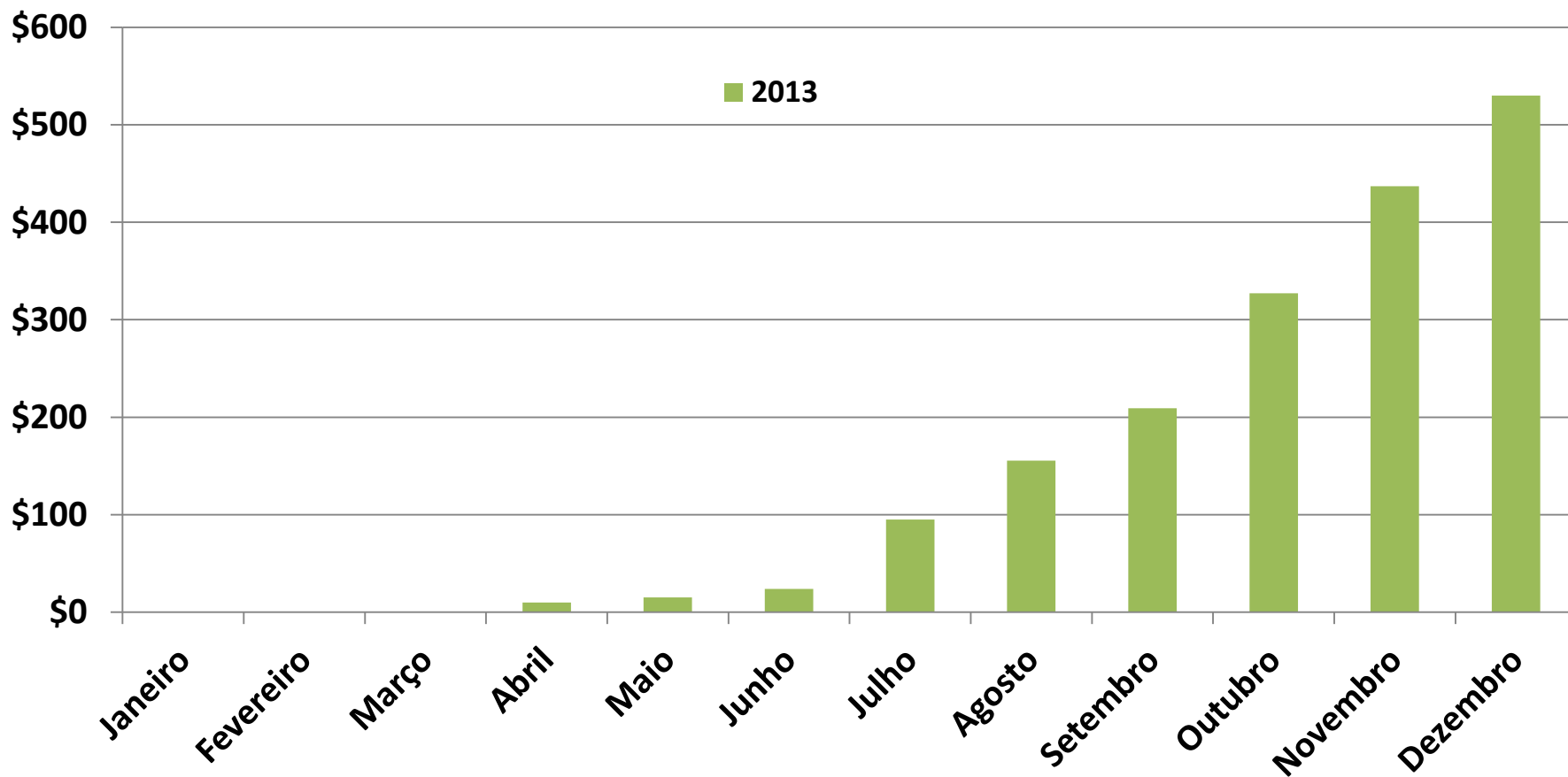


# ITA AGORA IHA NEBE?

Revizaun Despeza Publika: Kualidade Despeza – Kontratu  
Barak Mak Halo Iha Q4



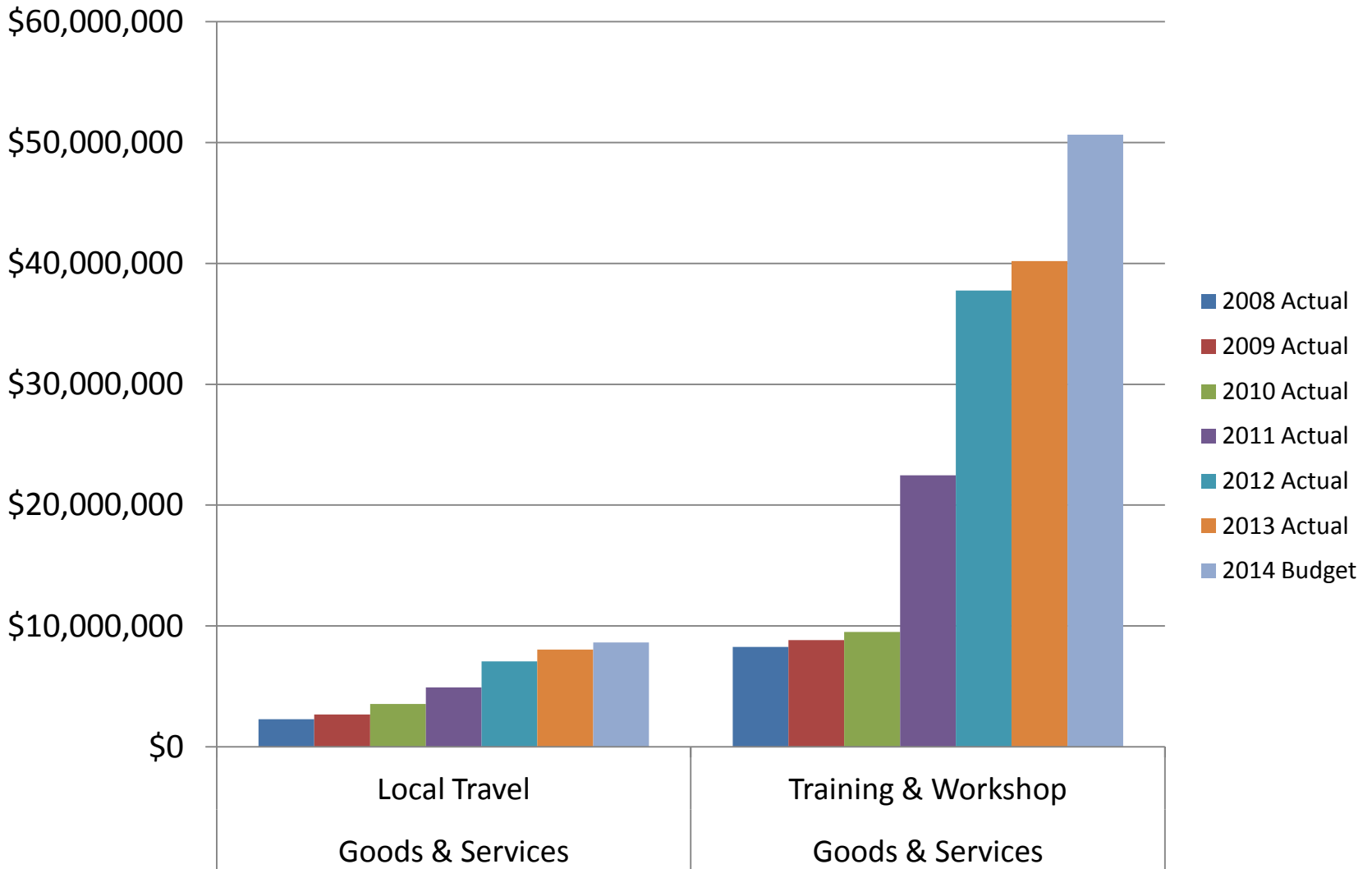
## Valor Kontratu Kada Fulan Iha Tinan 2013

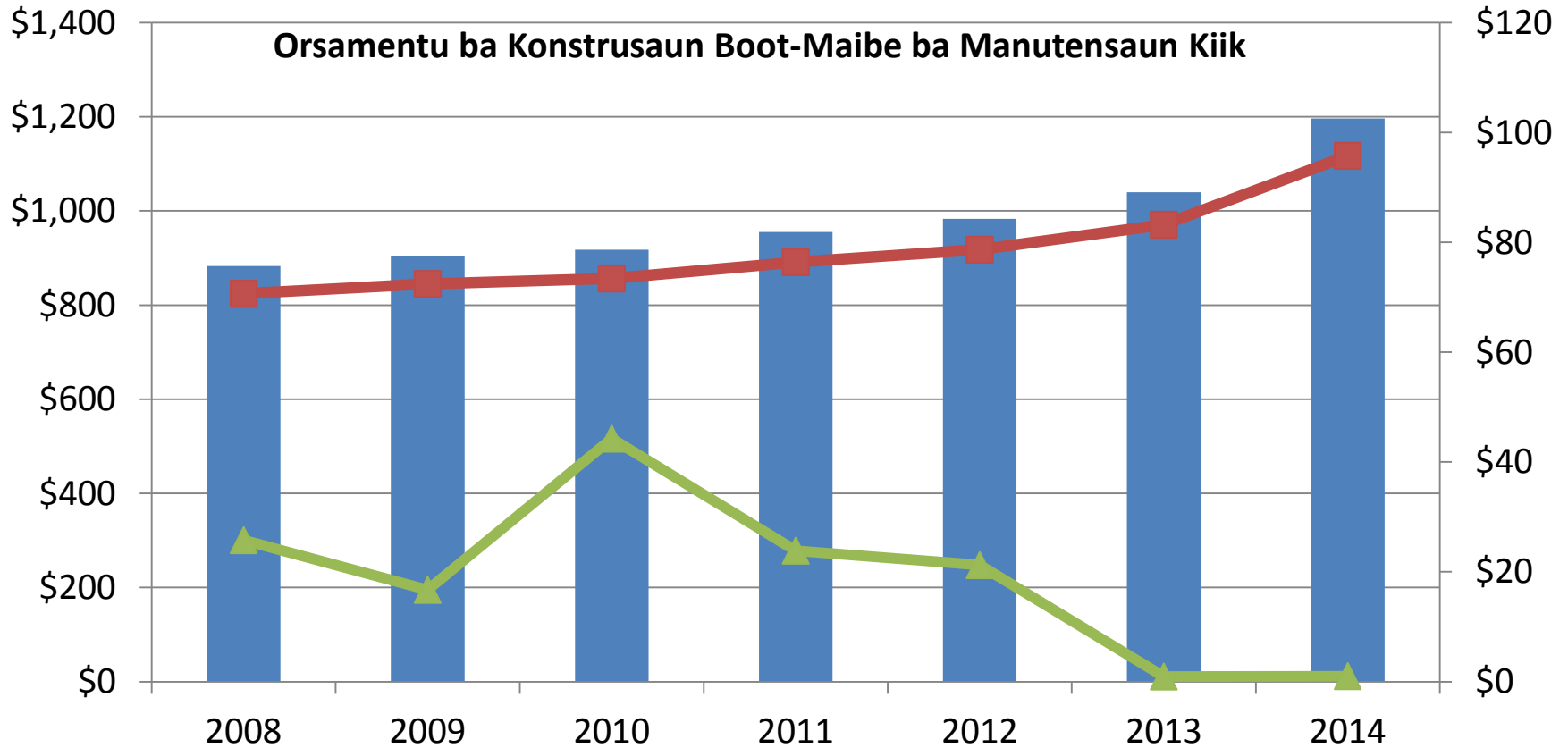




# ITA AGORA IHA NEBE?

Revizaun Despeza Publika: Kualidade Despeza – Despeza Nebe la fo Benefisiu Direita ba Povu





■ Asset Value of Roads

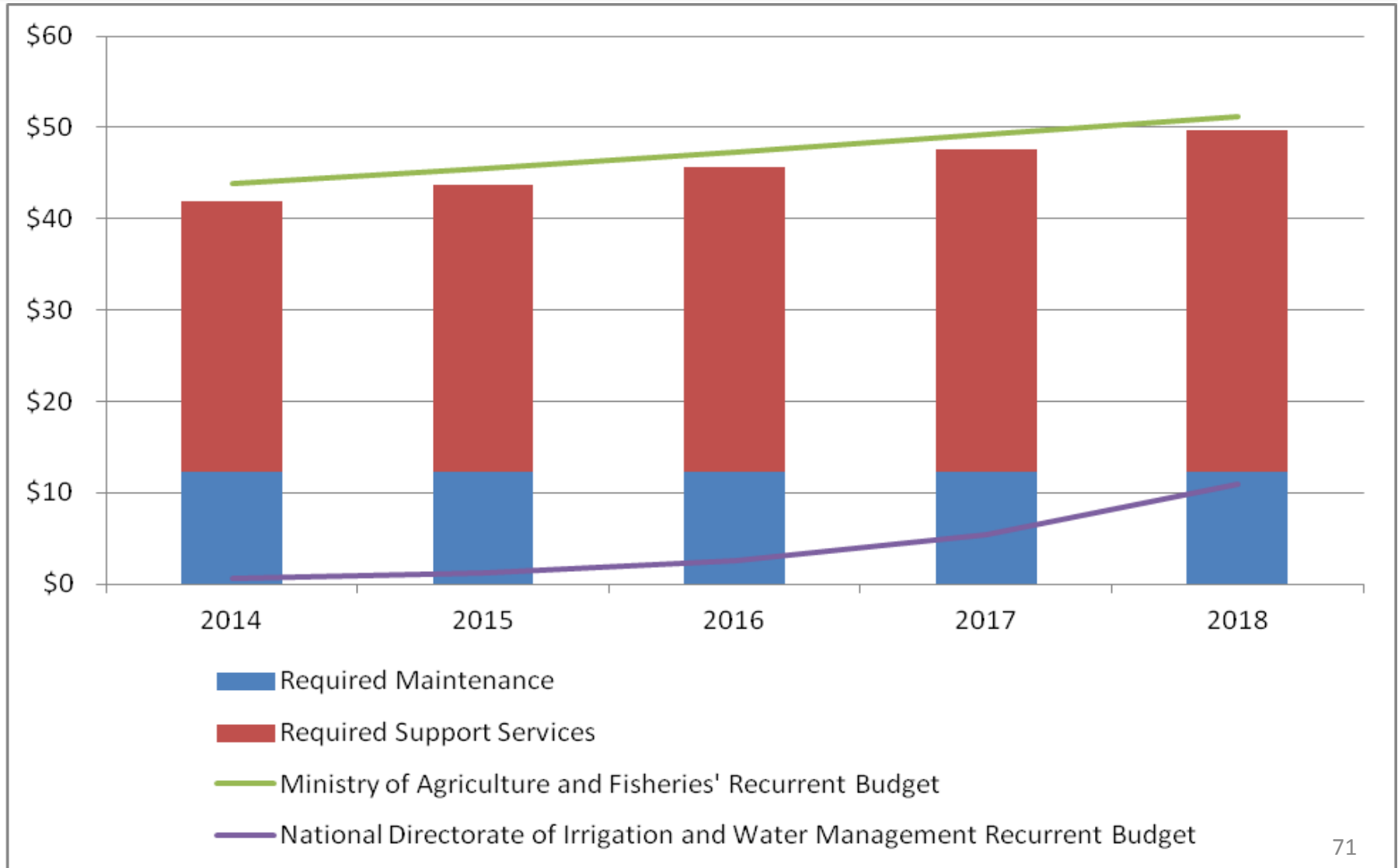
■ Roads Maintenance Required @8%

▲ Total Spending Of National Directorate of Roads, Bridges and Floods Control Services



# ITA AGORA IHA NEBE?

Revizaun Despeza Publika: Kualidade Despeza – Alokasaun Orsamentu ba Konstrusaun Irigasaun Boot Maibe Orsamentu la Suficiente ba Manutensaun no Input Seluk – Program Tenki Integradu

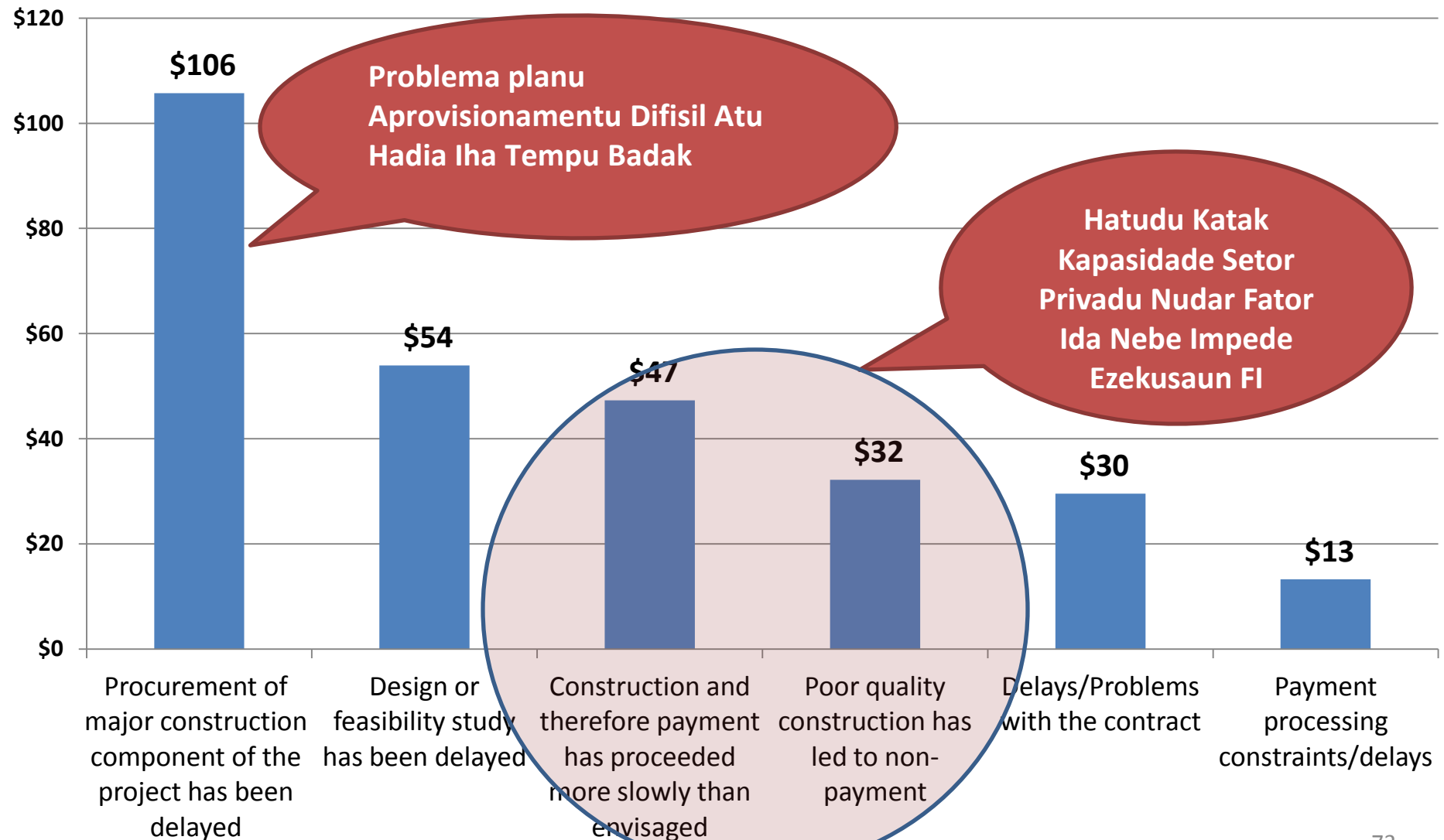


- Orsamentu boot maibe ezekusaun kiik
- Iha Evidensia katak kontratu no despeza barak mak halo iha Q4 – nunee potensia ba “single source”
- Iha aumentu ba despeza nebe la fo benefisiu direita ba povu
- Orsamentu ba konstrusaun boot – maibe Orsamentu ba Manutensaun kiik
- Mai ita halo orsamentu bazeia ba:
  - Sustentabilidade Fiskal
  - Kapasidade Ezekusaun
  - Kualidade Despeza
  - Kapasidade Ekonomia hodi Absorve (Absorptive Capacity)

# ITA AGORA IHA NEBE?

Revizaun Despeza Publika – Dezafius Iha Ezekusaun  
Projetos Fundu Infra-estrutura

## Ezekusaun Fundu Infra-estrutura (USD Tokon)



# ITA AGORA IHA NEBE?

Revizaun Despeza Publika



## Desafios Iha Implementasaun Projectos Fundo das Infraestruturas

20

- ❑ Falta de Planeamento nebe diak iha faze preparasaun no exekusaun projectos.
- ❑ Kompanhias barak mak seidauk iha capacidade teknika, financeira no gestaan de projectos. E.g. Kompanhias barak mak laiha pessoal tekniku experiente ba gestaan, supervisaun no trabalhadores qualificados ba exekusaun projetos tuir especificasaun teknika nebe iha.
- ❑ Atraso iha mobilização recursos no materiais de construção
- ❑ Execução projectos iha terreno neneik liu tamba falta de monitorização no acompanhamento husi gestores empresa construtora, supervisaun no projecto nain
- ❑ Dala barak, laiha entendimento diak entre empresa construtora, consultor supervisaun no projecto nain iha matérias técnicas relaciona ho execução projecto.
- ❑ Dala barak, submisaun documentos ba processo pagamento tama incompleto
- ❑ Supervisaun no monitorizasaun projectos precisa fortifica ho capacidade adequado husi parte governo no empreiteiro



# ITA AGORA IHA NEBE?

## Revizaun Despeza Publika -- Lalaok servisu Aprovizionamentu (Work Flow Chart)



### Prosesu Inisiu

1. Projetu Nain prepara dokumentus (Dezeñu tékniku, BOQ, Informasaun ba tender, TOR, sst)
2. Vistu husi MPS kona-ba orsamentu (fundus Infraestrutura).
3. Verifikasaun husi ADN kona-ba kustu no kualidade
4. CNA verifica depois hahú prosesa.

### Prosesu Konkursu no Avaliasaun

1. CNA analiza dokumentus, no fó sai anúnsiu ba públiku (Media lokál, Website MOF no DG Market) durasaun anúnsiu mínimu fulan 1.
2. Hafoin halo pre bid meeting no submisaun proposta tuir data ne'ebe termina. Proposta hotu sei loke ba públiku/perante kompetidór sira nia oin iha loron hanesan.
3. Prosesu avaliasaun proposta tékniku no finanseiru (mínimu semana 2, másimu fulan 1).
4. Valor kontratu husi \$5M>, sujeitu ba aprovasaun Conselho Ministros, se valor menus husi <\$5M aprovasaun husi CAFI/PM.
5. Publika Intend to Award (loron 5); Tempu ne'e mak oportunidade ba kompetidór sira hodi hato'o keixa no hetan debriefing husi CNA.

### Adjudikasaun Kontratu

1. Preparasaun Kontratu (Negosiasaun kontratu aplika ba servisu konsultoria)
2. Asinatura Kontratu (husi Kompañia Manan nain no Projecto Nain)
3. CNA sei lori fila kontratu ne'ebe asina ba Tribunal de Kontas hodi hetan vistu Previa. (Mínimu semana 2).
4. Entrega hikas kontratu ba projecto nain hodi hahú ezeusaun projecto.
5. Ezeusaun Projecto hahú (kualidade, fiskalizaun fila hotu ba responsabilidade Projecto nain no ADN).





# ITA PRESIZA HALO SAIDA?

Aprezentasaun 7 :  
Politika Fiskal no Envelope Fiskal

- Politika Fiskal:
  - Vantajen: Iha Fundu Petroliferu nudar Reserva
  - Desvantajen: Sei depende maka'as ba Mina-rai – tamba reseitas domestika menus husi 11% husi despeza total anual
- Tenki hakore an husi dependensia maka'as ba Mina-rai - hasae reseitas domestika liu husi diversifikasaun ekonomia no politika ekonomia nebe orientadu ba kresimentu nebe boot, sustentavel, no inklusivu.
- Politika Fiskal tenki sustentavel ba tempu naruk no iha kualidade despeza nebe promove dezenvolvimentu
  - Infra-estrutura,
  - Rekursus umanus,
  - Sosiu-ekonomiku,
  - Institusaun publiku.



# ITA PRESIZA HALO SAIDA?

## Politika Fiskal: Regulamentu no Disiplina Fiskal



Atu iha **Sustentabilidade Fiskal**, Governu estabele ona instrumentu fiskal hirak tuir mai nudar meius atu kontrola despeza publiku

Regulamentu Fiskal	Deskrisaun
Rendimentu Sustentavel Estimativu (RSE)	Foti 3% deit husi Fundu Petroliferu hodi Nunee TL nia Fundu Petroliferu la hotu iha tempu naruk
Enkuadramentu Despeza Publiku Bazeia ba Estratejia PED	Politika Fiskal “Fontloading”: Foti liu ESI iha tempu badak hodi finansia programa dezvoltamentu infra-estrutur no Rekursus Umanus – maibe tenki fila fali ba ESI iha mediu no longu-prazu.
Despeza Rekorente	Presiza iha disiplina ba despeza rekorente - atu iha sustentabilidade fiskal, kresimentu anual despeza rekorente labele liu 4% too 6%
Fiscal Deficit Rule	Non-oil deficit = (domestic revenue – expenditure)/ non-oil GDP. This shows increase in demand due to Government expenditure. Should not exceed 70% and should fall to 50% in medium term
Reseitas Domestika	Tenki hasae reseitas domestika liu husi: kresimentu ekonomiku nebe boot, hadia lei tributaria no administrasaun tributaria
Determinasaun Envelope Fiskal	Konselhu Ministrus determina envelope fiskal bazeia ba: <b>prioridade nasional, sustentabilidade fiskal, kapasidade ezekusaun, kualidade despeza no kapasidade ekonomia atu absorve</b>

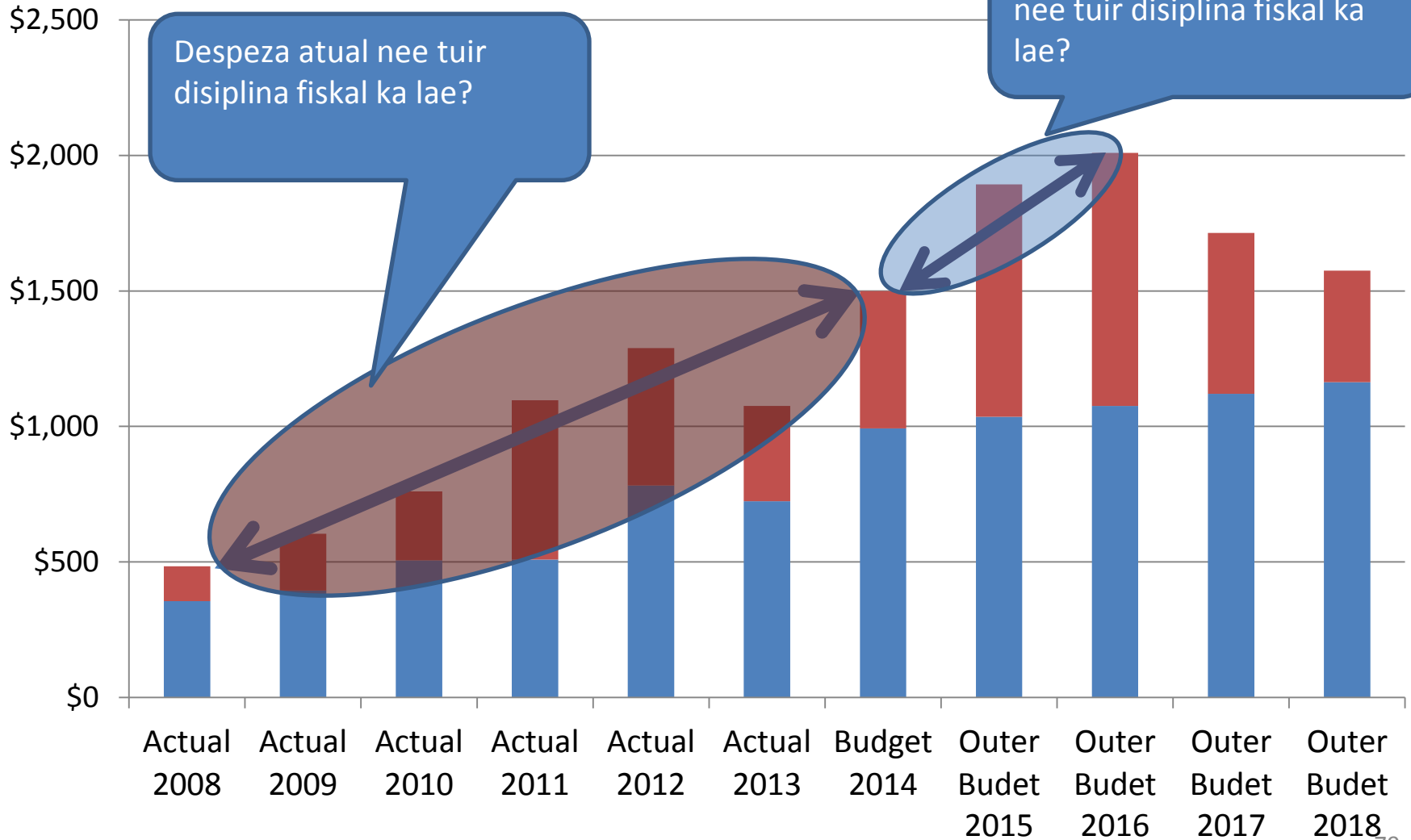


# ITA PRESIZA HALO SAIDA?



Politika Fiskal: Despeza Atual no Planu Despeza Iha Futuru  
Tuir RSE ka lae?

■ Recurrent ■ Capital

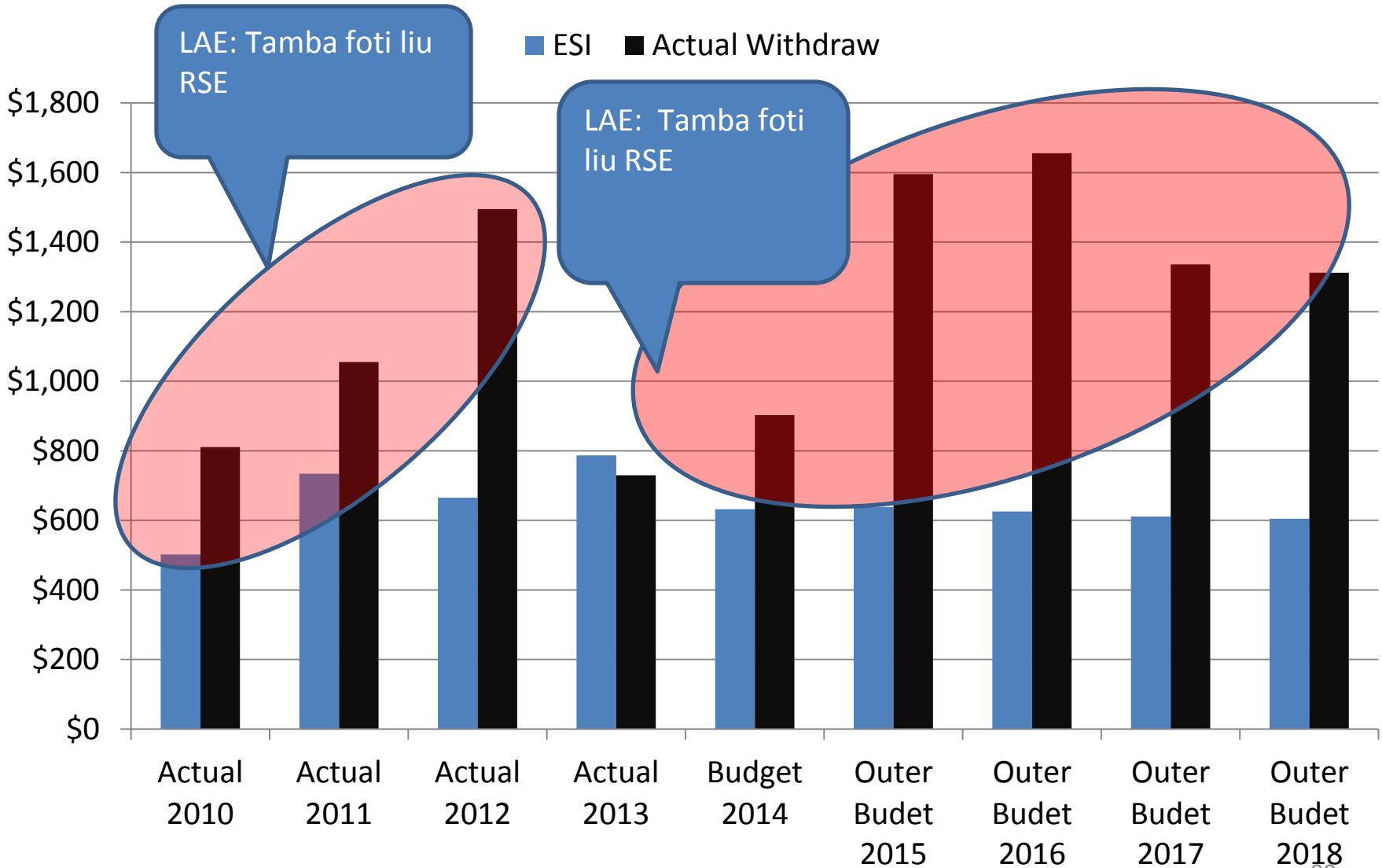




# ITA PRESIZA HALO SAIDA?



Politika Fiskal: Despeza Atual no Planu Despeza Iha Futuru  
Tuir RSE ka lae?

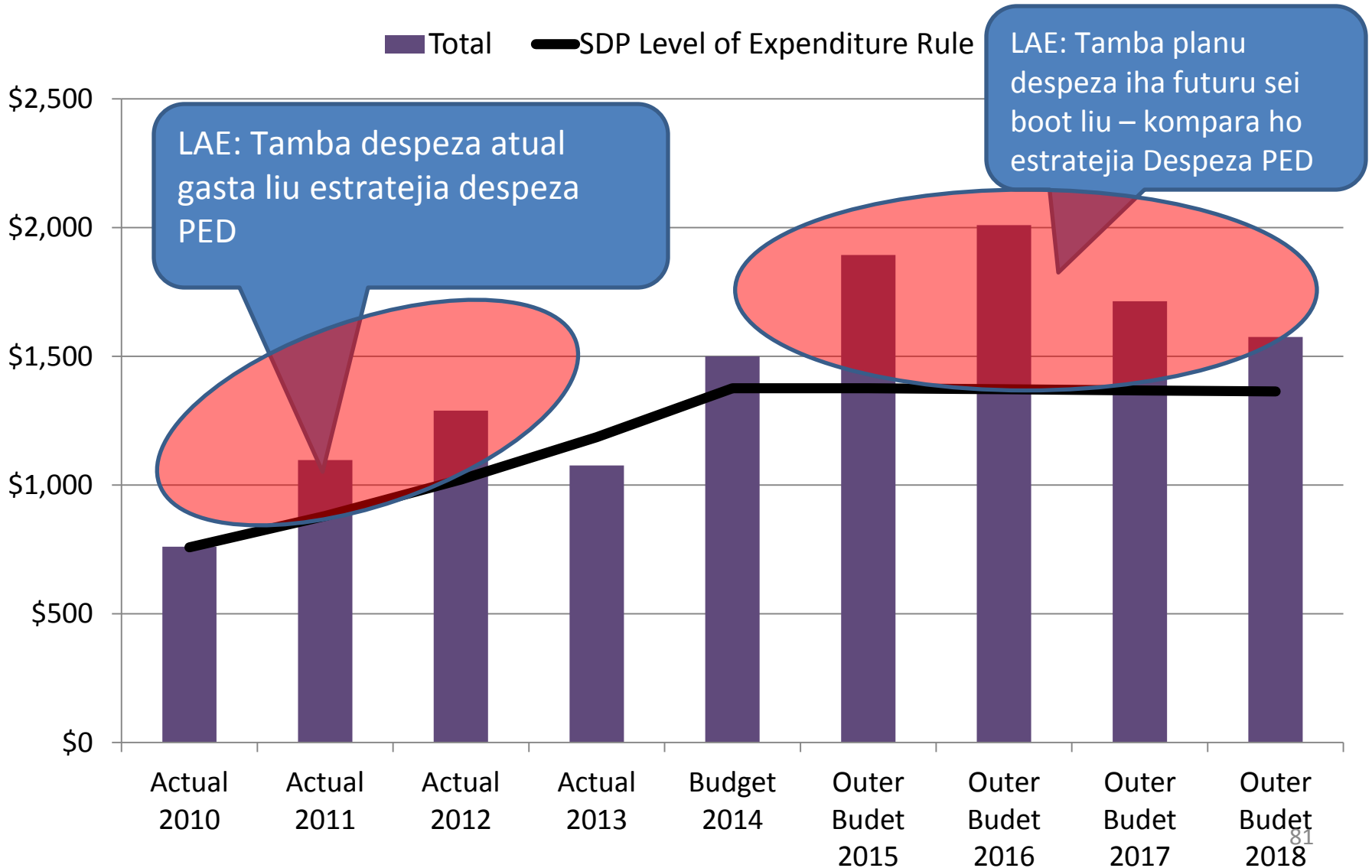




# ITA PRESIZA HALO SAIDA?



Politika Fiskal: Despeza Atual no Planu Despeza Iha Futuru  
Tuir Estratejia Despeza PED ka lae?

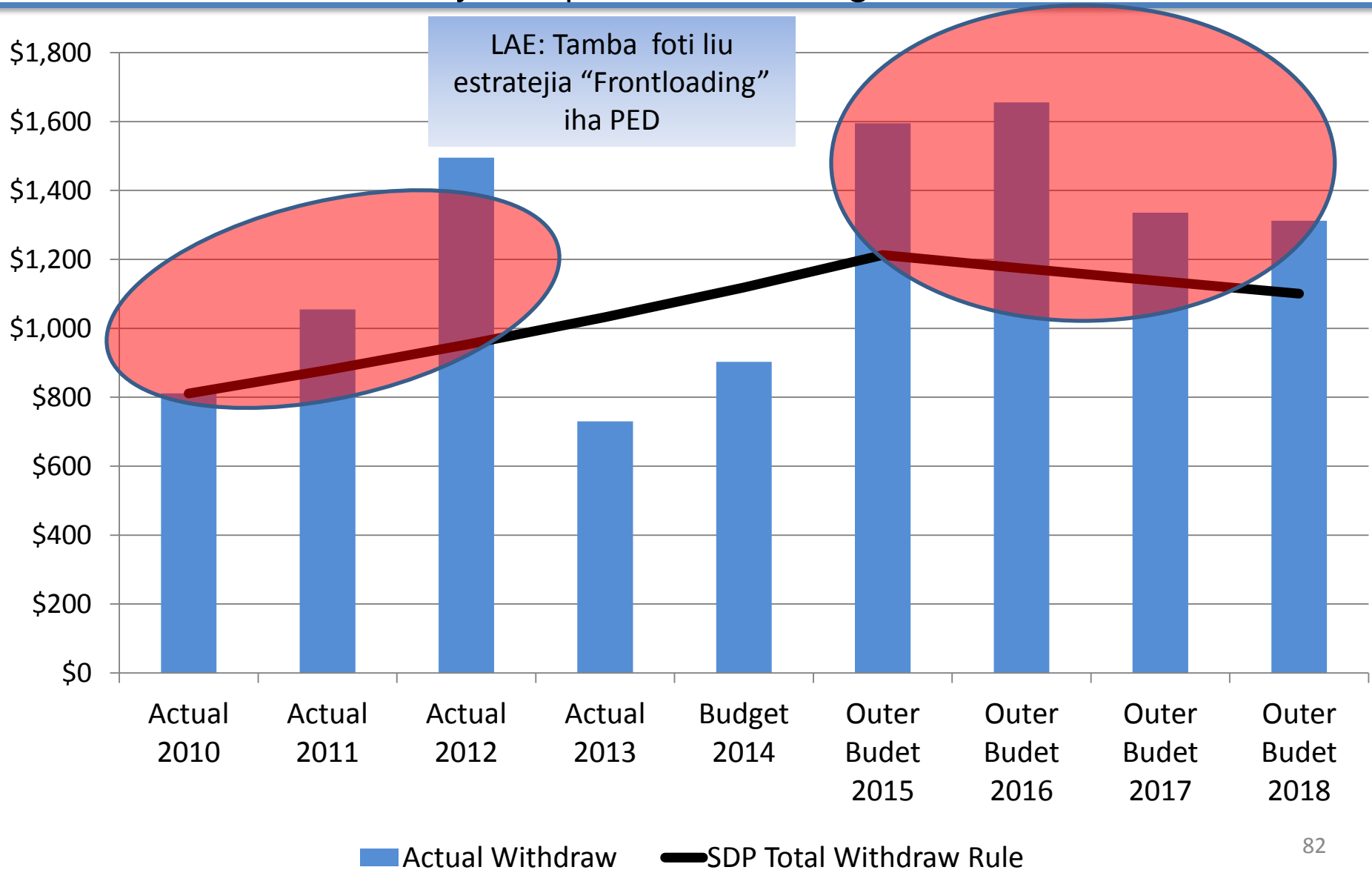




# ITA PRESIZA HALO SAIDA?



Politika Fiskal: Despeza Atual no Planu Despeza Iha Futuru  
Tuir Estratejia Despeza “Frontloading” iha PED ka lae?



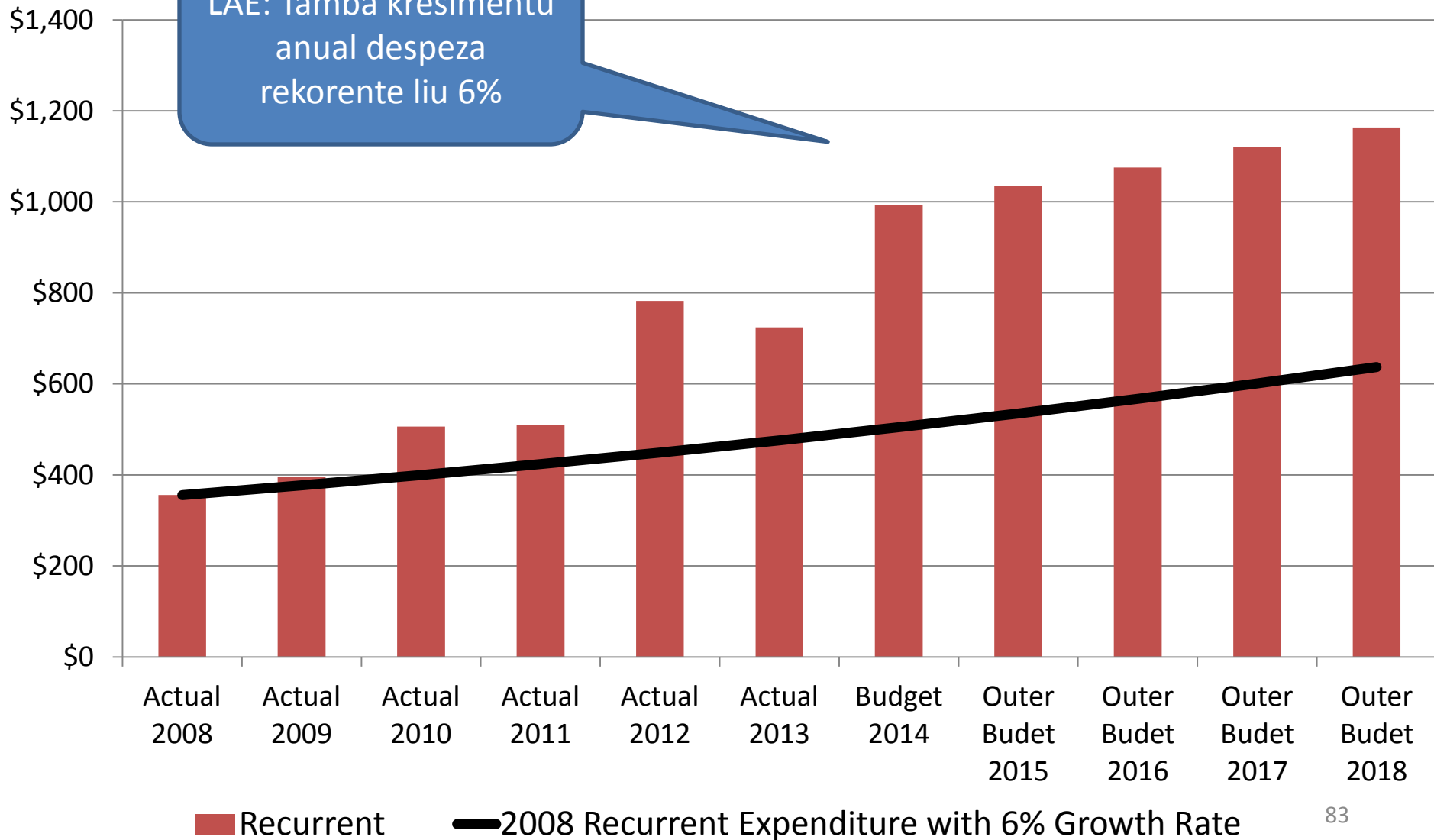


# ITA PRESIZA HALO SAIDA?



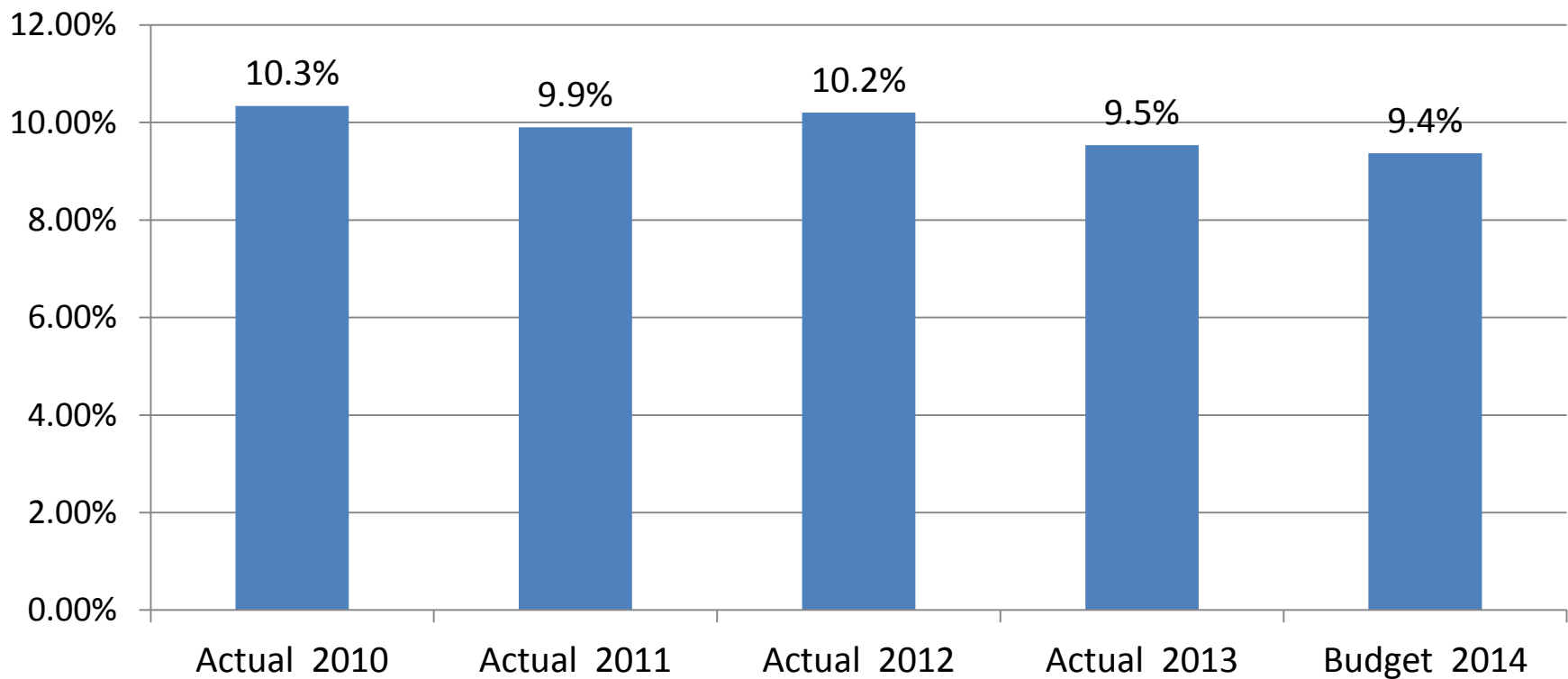
Politika Fiskal: Despeza Atual no Planu Despeza Rekorente  
Tuir Disiplina Fiskal ka lae?

LAE: Tamba kresimentu  
anual despeza  
rekorente liu 6%





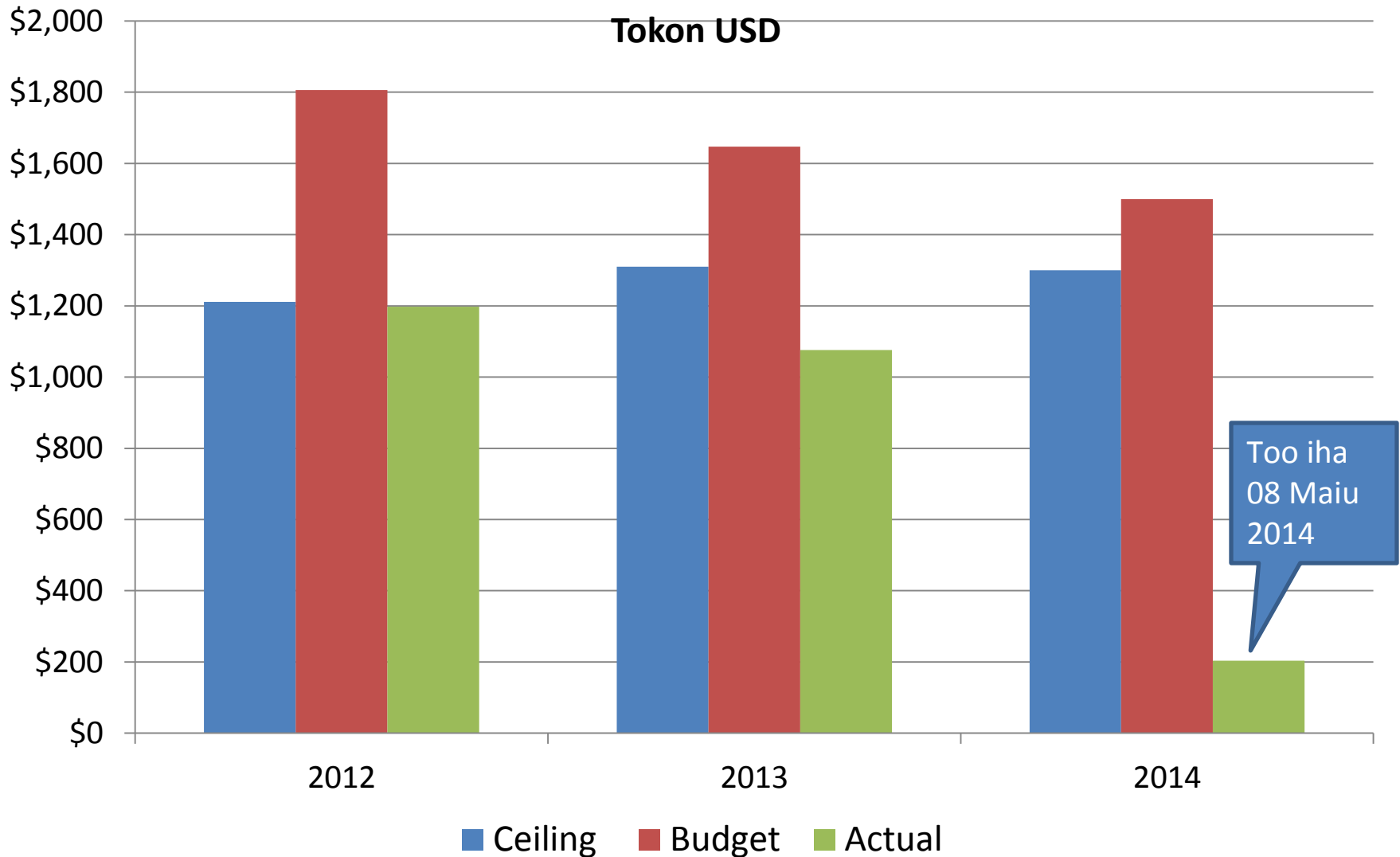
- Governu iha komitmentu atu aumenta reseitas domestika
- Presiza estabele grupu trabalhu nasional ba reforma lei tributaria no investimentu – Komitmentu Governu iha 2014





# ITA PRESIZA HALO SAIDA?

Politika Fiskal: OJE Iha Pasadu Tuir Envelope Fiskal Nebe Determina iha YRW  
ka Lae



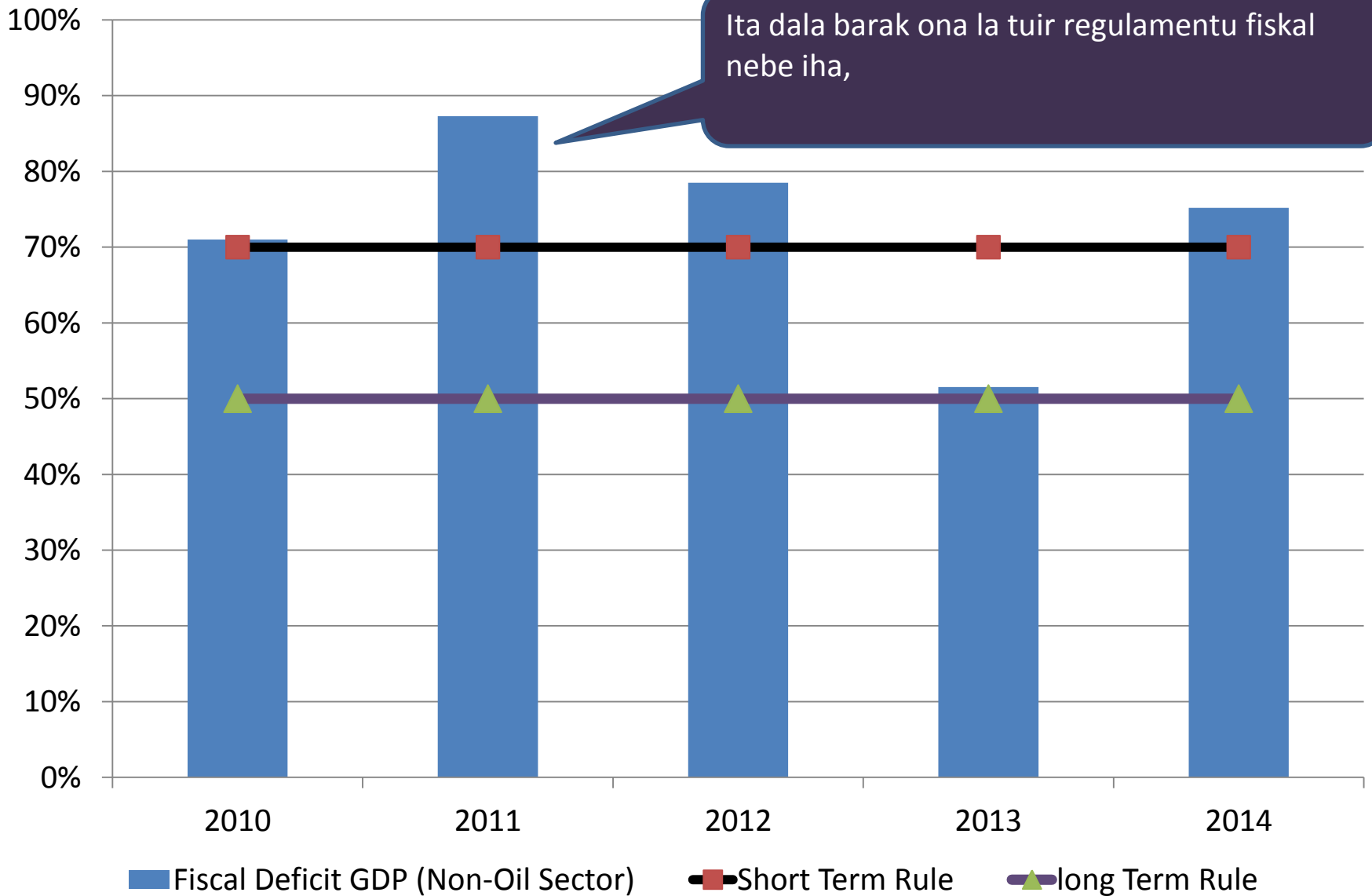
# ITA PRESIZA HALO SAIDA?

Politika Fiskal: Sumariu Kona-ba Regulamentu no Disiplina Fiskal

Regulamentu Fiskal	Kumpri Regulamentu Fiskal ka lae?
Rendimentu Sustentavel Estimativu	LAE: Ita foti osan liu RSE husi Fundu Petroliferu ba OJE anual
Politika Fiskal “Frontloading” Tuir Estratejia Despeza PED	LAE: Ita gasta barak liu kompara ho politika fiskal “frontloading” iha PED
Politika Fiskal “Foti Liu RSE” Tuir Estratejia Nebe Artikula iha PED	LAE: Ita foti liu RSE husi Fundu Mina-rai la tuir estratejia nebe artikula iha PED
Kresimentu Anual Despeza Rekorente (4% too 6%)	LAE: Hahu husi ano fiskal 2008 kresimentu despeza rekonrente liu 6%
Hasae Reseitas Domestika Nudar % Husi PIB	LAE: Reseitas Domestika la sae maka’as maski kresimentu ekonomiku boot – rejime tributaria jenerouzu liu
Envelope Fiskal	LAE: Iha 2012-2014, orsamentu sempre boot liu envelope fiskal

# ITA PRESIZA HALO SAIDA?

Politika Fiskal: Ita Disiplina Iha Fiskal Ka Lae?





# ITA PRESIZA HALO SAIDA?

(1) Politika Fiskal: Saida Mak Sei Akontese se karik Ita Kontinua la iha Disiplina Fiskal

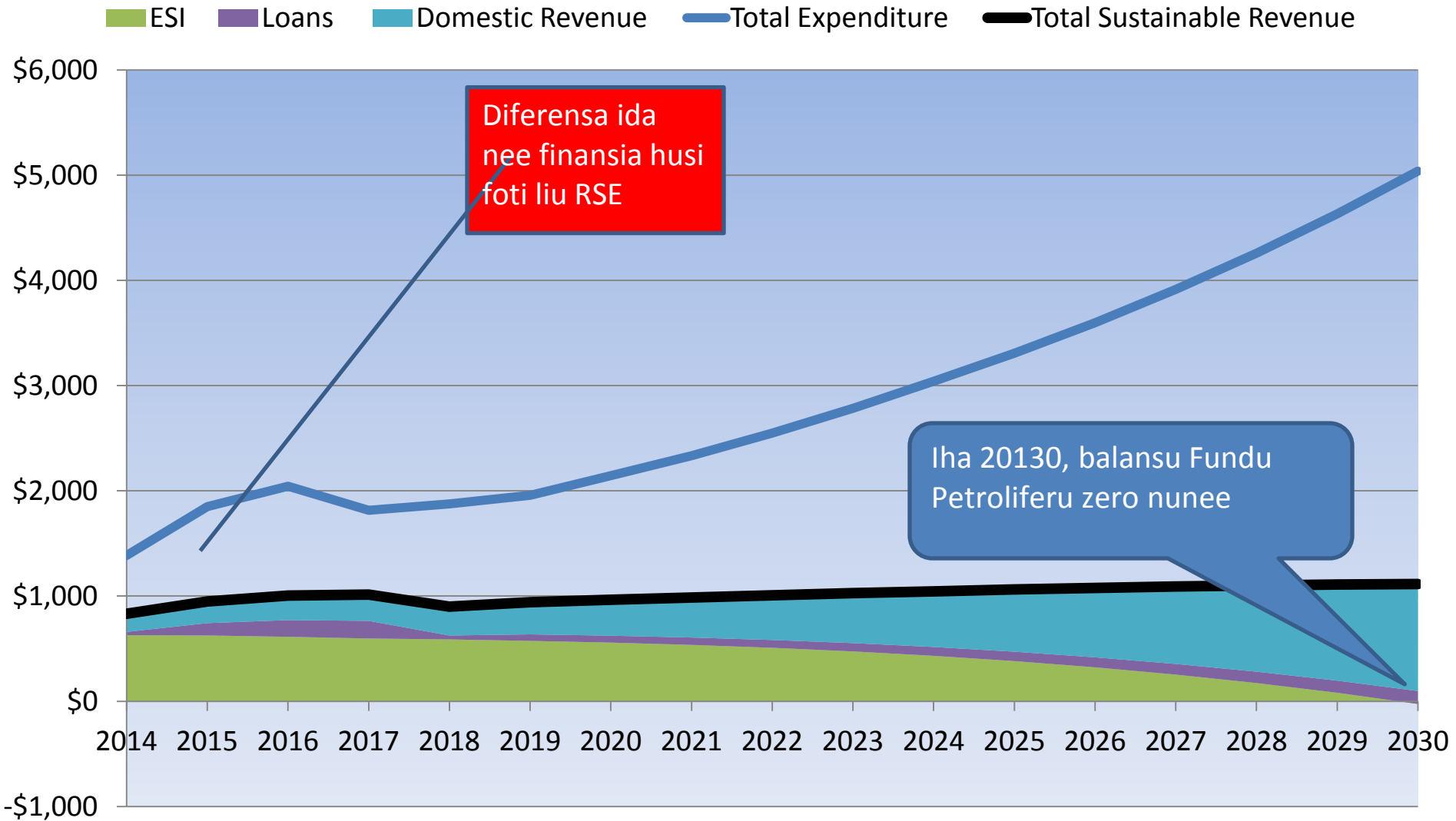


- Ministeriu Finansas liu husi Diresaun Nasional Politika Ekonomia halo ona estudu no analize kona-ba enkuadramentu fiskal ba Timor-Leste iha tempu naruk:  
Asumsoens/Asumsi Prinsipais iha estudu nee mak:
  - Despeza ba kapital dezenvolvimentu hanesan iha livru orsamentu no 1 ba OJE 2014
  - Kresimentu despeza rekorente 9% kada tinan
  - Tasa reseitas domsetika 10% husi total PIB – nivel ekonomia aumenta boot.
- Rezultadu analize hatudu katak Fundu Petroliferu sei hotu iha 2030 – Hahu iha 2031 despeza tenki hatuun no sei afeta ba dezenvolvimentu ekonomiku.



# ITA PRESIZA HALO SAIDA?

(2) Politika Fiskal: Saida Mak Sei Akontese se karik Ita Kontinua la iha Disiplina Fiskal



- Governu presiza define prioridade nasional ba 2015
- Bazeia ba evidensia hirak nee no hodi konsidera: sustentabilidade fiskal, kapasidade ezeusaun, qualidade despeza no kapasidade ekonomia atu absorve, Ministeriu Finansas rekomenda envelope fiskal ba OJE 2015 ho montante US\$ biliaun 1.300

<b>Total Envelope Fiskal</b>	<b>\$1,300 million</b>
Envelope Fiskal ba Despeza Rekorente	\$793 million
Envelope Fiskal ba Despeza Kapital & Dezenvolvimentu	\$507 million

- Montante ida nee tuir estratejia despeza PED no bele asegura sustentabilidade fiskal ba tempu naruk