

Dezenvolvimentu Ekonómiku iha Timor-Leste

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Introdusaun

Finansiamentu:

Programa Asisténsia hosi Governu Australia
(*Australian Aid Program*)

Objetivu-sira:

- Refleta ba Faze I Planu Estratéjiku Dezenvolvimentu
- Explora papél dezenvolvimentu agríkola hodi redús pobreza no kria kreximentu ekonomia ida ne'ebé sustentável

Planu Estratêjiku Dezenvolvimentu (SDP):
**“Atu sai nasaun ne'ebé ho rendimentu iha nivel médiu
 ba leten iha tinan 2030” ho populasaun ne'ebé
 saudavel, edukadu no seguru
 iha tinan 2030**

- Planeamentu asaun hodi atinje objetivu ida-ne'e difisil:
 - Iha prioridade barak mak kompete ba malu
 - Presiza liña koordinasaun iha area oioin
 - Inisiativa balun fó impaktu sosiál ne'ebé ladún ajuda
- Laiha ema ida mak iha resposta hotu!
Ami iha ne'e atu rona no aprende, no ho haraik an refleta hosi perspetiva ema li'ur nian

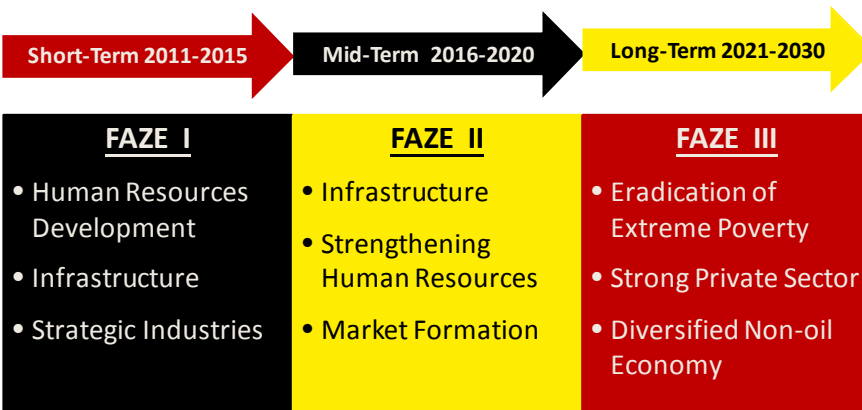


SDP phases of implementation



STRATEGIC DEVELOPMENT PLAN 2011-2030

“Vision :Timor-Leste to be an upper-middle income country by 2030”



4

FAZE I

- Dezenvolvimentu Rekursu Umanu
- Infra-estrutura
- Indústria ne'ebé Estratéjiku

Prioridade tolu ne'e importante tebes ba Dezenvolvimentu ida ne'ebé susesu

- **Infra-estrutura** – buat hirak ne'ebé mak fasilita atividade ekonómiku. Maibé: sira rasik la'ós atividade ekonómiku (sustentável).
- **Rekursu Umanu** – pesoál ne'ebé bele aproveita oportunidade ekonómiku ne'ebé mak kria hosi infra-estrutura.
- **Indústria ne'ebé Estratéjiku** – infra-estrutura mesak de'it sei la to'ó. Presiza akompañá ho “estímulu ba povu” (*grass roots stimulus*), ne'ebé fó target ba setór prioridade ne'ebé espesífiku.

FAZE I

- Dezenvolvimentu Rekursu Umanu
- Infra-estrutura
- Indústria ne'ebé Estratéjiku

Impaktu ba pobreza saida mak ita bele haree durante Faze I?

Durante faze ida-ne'e, parese sei laiha impaktu boot ba Pobreza. Tansá?

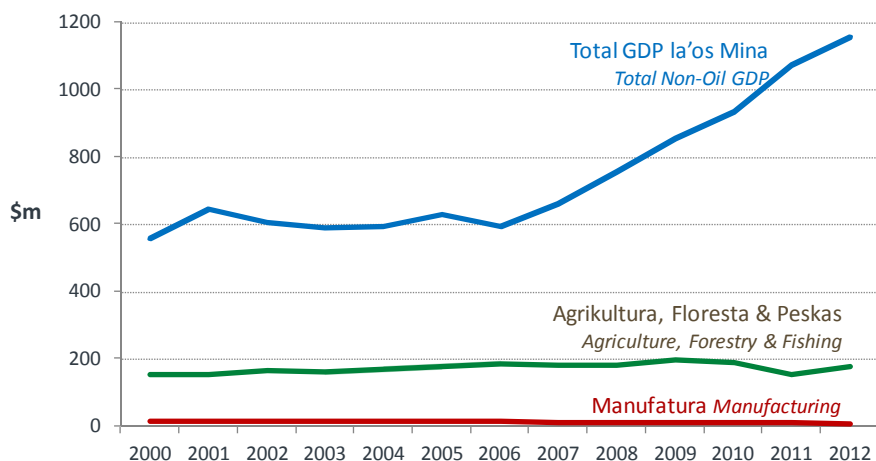
- Investimentu iha kapital umanu no projetu infra-estrutura boot, fó impaktu uitoan de'it iha tempu badak.
- Impaktu balun ita bele haree hosi “indústria ne'ebé Estratéjiku” – agrikultura no manufatura.

Maibé, agrikultura no manufatura mak área ne'ebé nia progresu difisil tebes atu atinje.

GDP la'ós Mina

ho Presu ne'ebé konstante

GDP la'ós mina ne'ebé Reál, jerálmente sa'e maka'as,
maibé la'ós iha agrikultura no manufatura



Why has growth in manufacturing been slow?



Constraints

- Labor costs are relatively high and educational standards are poor
- Poor business climate
- Inflation was high from 2011 to 2013 likely pushing up costs for businesses
- Import duty rates are low and do not give an incentive to produce domestically
- Government has not yet identified specific sub-sectors (e.g. food processing, brewing etc) of manufacturing where Timor-Leste could compete

Many of these issues are now being addressed

- Improving business climate; with introduction of SERVE (one stop shop)
- Inflation has fallen and access to education has improved
- CoM recently established a working group to review import duty and excise to encourage domestic production (without reducing overall domestic revenue)
- Ministry of Finance and ESCAP are undertaking study on economic diversification

Evidence of sharp increase in number of international companies interested in investing in Timor-Leste



Why has growth in agricultural production been slow?



No detailed study has been done on this issue. But likely causes are:

Poor Incentives

- Access to money in rural areas from pensions, remittances, labor on PDID schemes *arguably* means that there is less incentive to work long hours to produce food to sell
- Access to jobs and education in Dili may have encouraged urban migration of younger more productive farmers
- Importation of subsidized and non-subsidized international rice probably improves living standards but lowers domestic prices and production

Limited Support Services

- Limited access to subsidized inputs (fertilizer), extension services and marketing

Cultural Constraints

- Farmers may not regard main staple crops (rice and corn) as business opportunities
- Poor harvest in 2011 (due to heavy 2010 rains) and access to subsidized rice may have led to a shift in tastes away from corn toward rice

Inefficient Investments

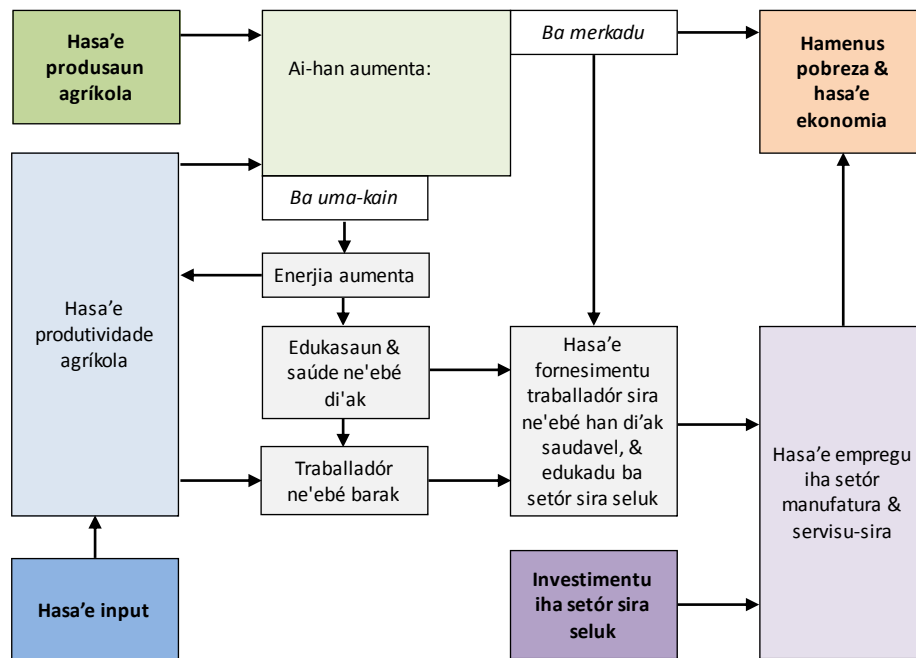
- Large scale investments in weir based irrigation schemes seem are unlikely to significantly increase production

9

Setór Agrícola

Tansá mak setór ida-ne'e prioridade?

- Dezenvolvimentu kuaze sempre hahú hosi setór agrikultura – ne'ebé involve ema, no oinsá ema hirak ne'e hala'o nia moris.
- Dezenvolvimentu involve halo modernizasaun ba atividade ekonómiku iha setór agríkola no setór “urbanu” (manufatura, bens e servisu), no halo balansu entre setór hirak ne'e.



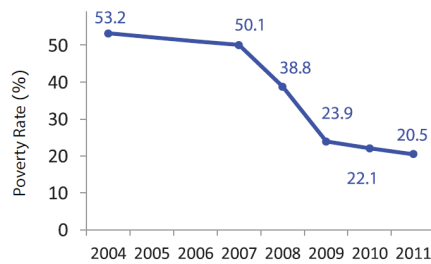
Kamboja nia Istória

Kamboja iha istória balun ne'ebé hanesan ho Timor-Leste:

- Konflitu 1970-1999, tuir kedan ho prosesu konstrusaun ba Pas
- Populasaun porsentu 80 mak hela iha área rurál
- Barak liu mak agrikultura subsistensia (ho mistura fini no perfíl esporta ne'ebé diferente – barak liu iha Kamboja mak foos)
- Iha 2007, taxa pobreza mak porsentu 50.1 (porsentu 53.2 iha tinan 2004)

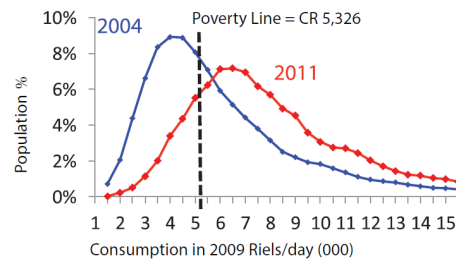
Kamboja nia Istória

Figure B1: National Poverty Rate, Cambodia 2004-2011



Source: World Bank staff estimates based on CSES

Figure B2: Population Shares By Consumption, Cambodia



Kamboja nia Istória

Oinsá sira bele halo?

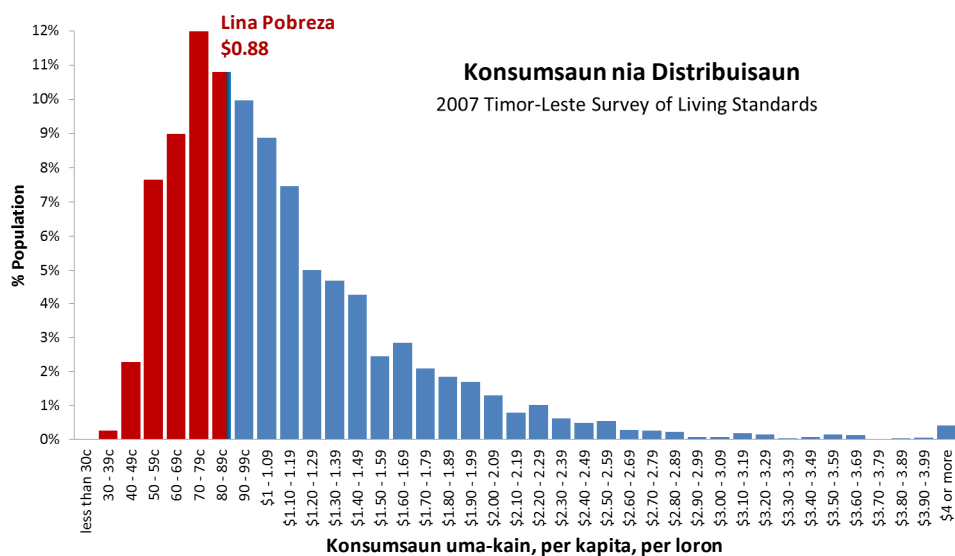
- Investimentu Governu ba iha infra-estrutura báziku rural (dalan, irrigasaun rural no sst)
- Urbanizasaun uitoan de'it
- Produsaun fini (foos) kuaze dobradu (dua kali lipat). Ida-ne'e atinje liuhosi hadi'ak produsaun no espande área kultivasaun (budidaya pertanian)
- Sorte: Presu foos mundiál ne'ebé sa'e maka'as

Pobreza iha Timor-Leste

Pobreza Konsumsaun, TLSLS 2007:

- Porsentu 49.9 mak iha liña pobreza konsumsaun nia okos

Pobreza Konsumsaun

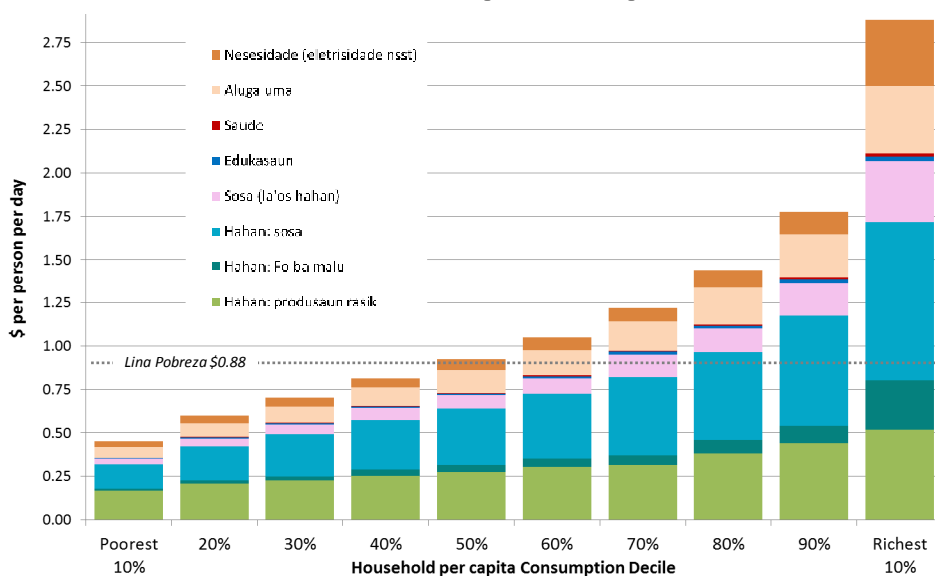


Oinsá mak ita kalkula Pobreza Konsumsaun?

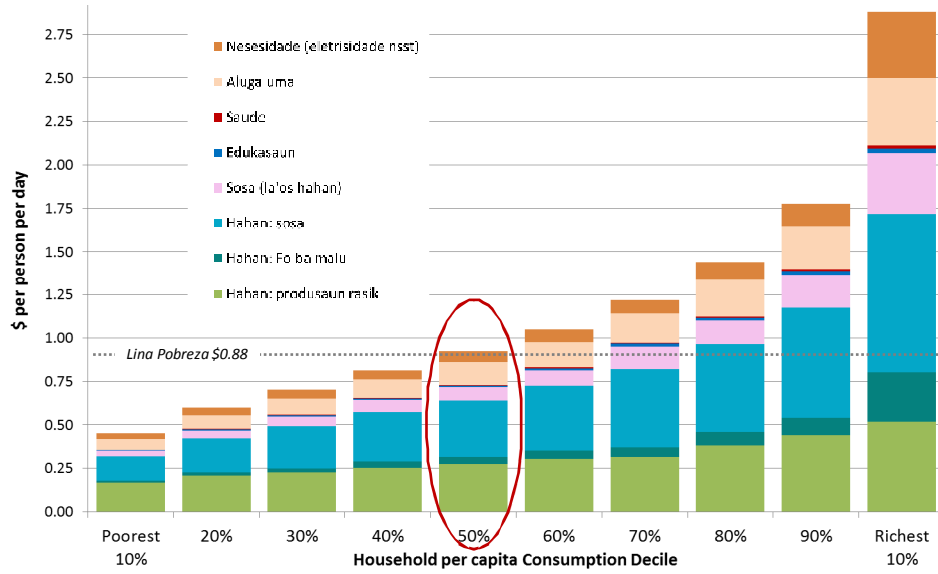
Adisona (tambahkan) valór despeza uma-kain per kapita (atuál ka kalkulasaun) hosi kada:

- Nesesidade (eletridade nsst)
- Aluga uma
- Saúde
- Edukasaun
- Buat ruma ne'ebé família sosa (la'ós hahan)
- Hahan

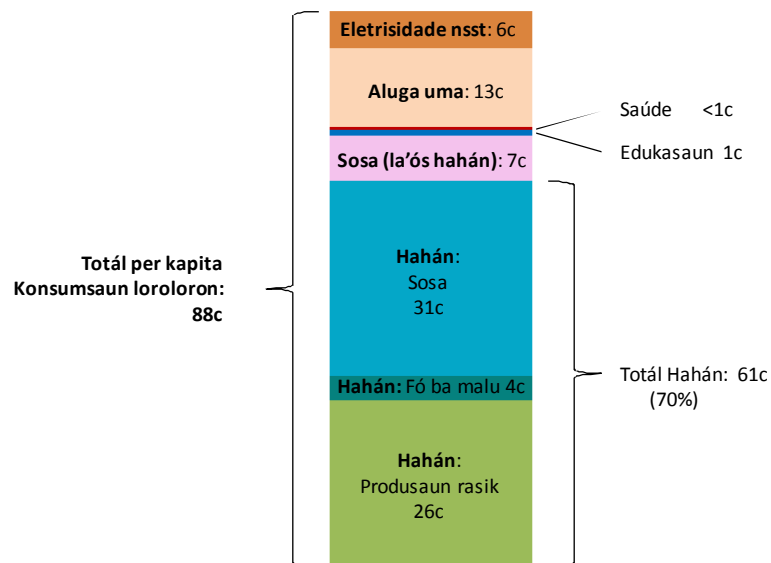
Komponente Konsumsaun Uma-kain per kapita



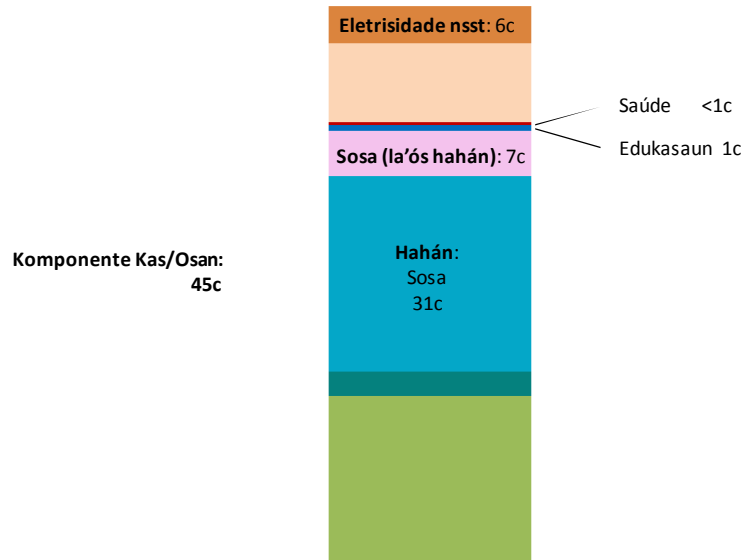
Komponente Konsumsaun Uma-kain per kapita



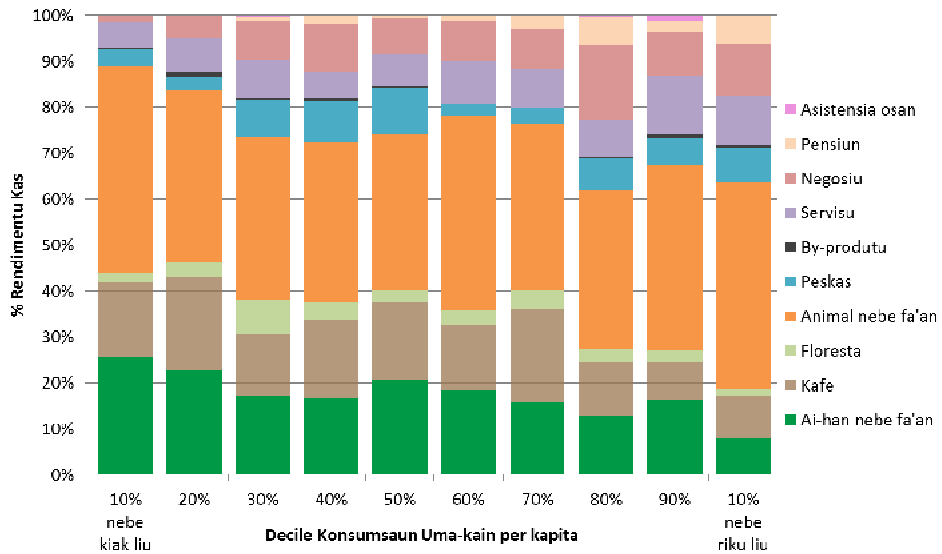
Komponente Konsumsaun Uma-kain per kapita



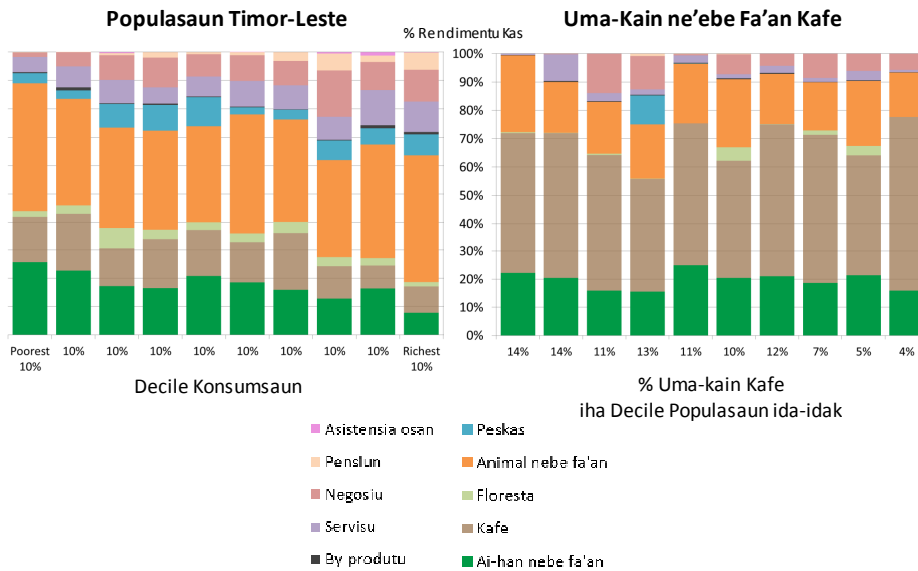
Komponente Konsumsaun Uma-kain per kapita



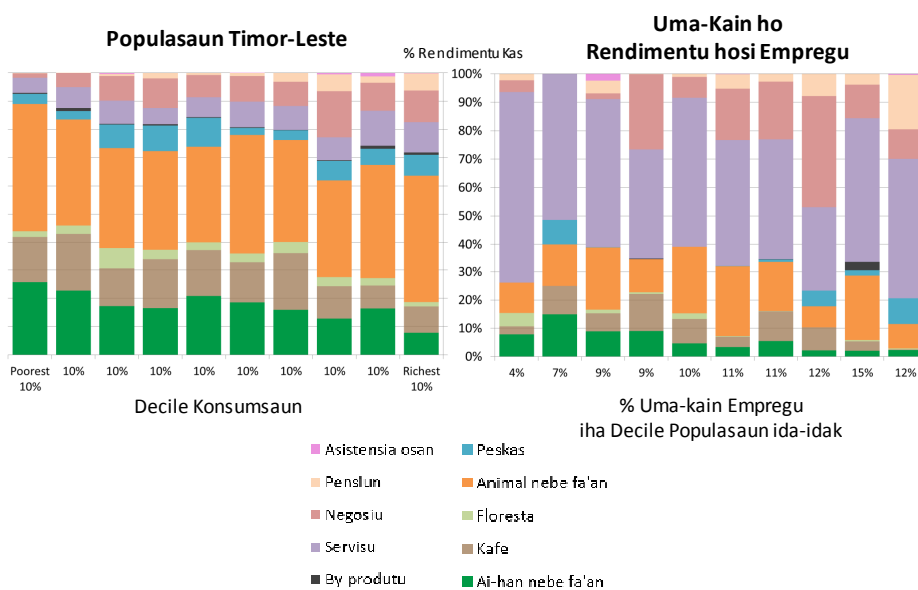
Osan / Kas Mai hosi Ne'ebé?



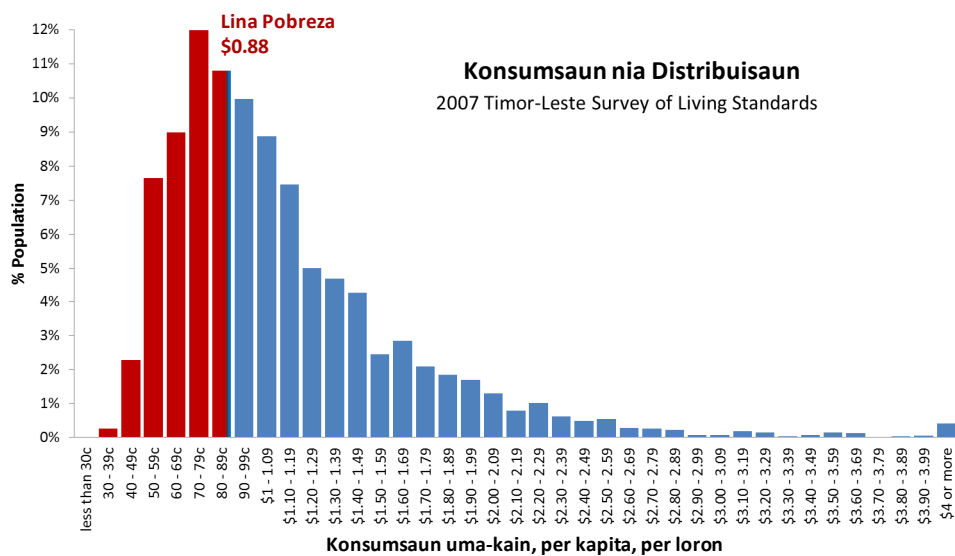
Osan / Kas Mai hosi Ne'ebé



Osan / Kas Mai Hosi Ne'ebé



Saida mak bele ajuda hodi hasa'e uma-kain ba liña pobreza nia leten?



Simulasaun: Se Karik ... ? Kreximentu iha Agrikultura

Karik uma-kain agrikultura no kafé (populasaun porsentu 47) bele hasa'e sira nia produsaun...

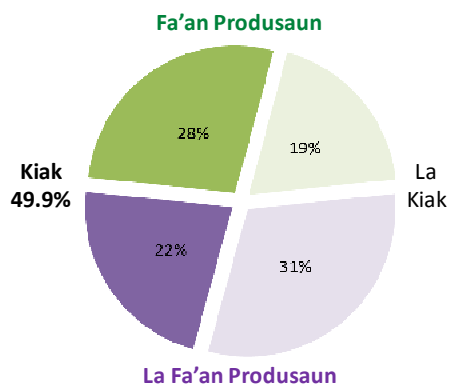
...Saida mak sei akontese ba taxa pobreza?

Simulasaun: Se karik ... ? Kreximentu iha Agrikultura

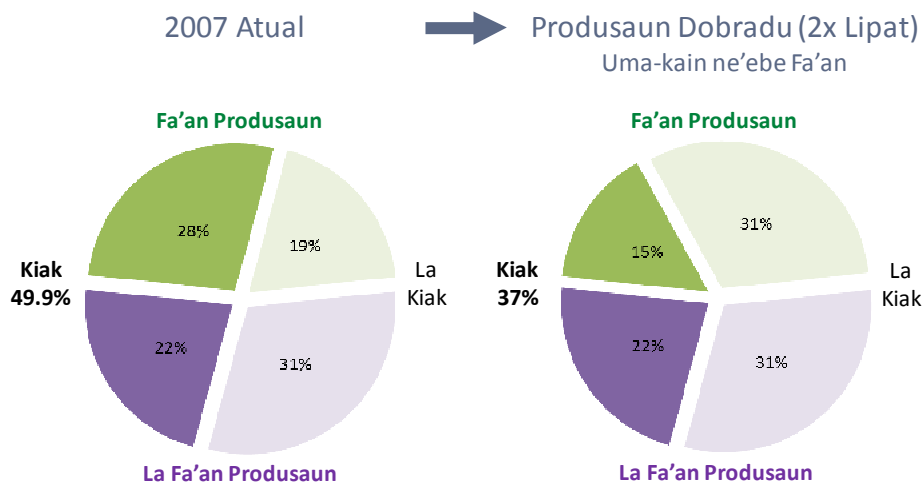
	% Populasaun	Taxa Pobreza entre uma-kain hirak ne'e
Fa'an Ai-han (maibé la'ós kafé)	26 %	57 %
Fa'an kafé (maibé la'ós fini)	5 %	63 %
Fa'an Ai-han & Kafé	16 %	61 %
Hotu iha Leten	47 %	59 %

Simulasaun: Se karik ... ? Kreximentu iha Agrikultura

2007 Atual



Simulasaun: Se karik ... ? Kreximentu iha Agrikultura

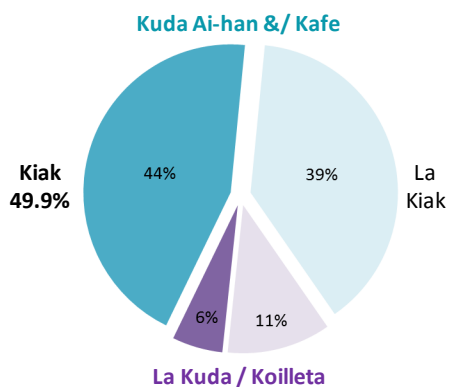


Simulasaun: Se karik ... ? Kreximentu iha Agrikultura

	% Populasaun	Taxa Pobreza entre uma-kain hirak ne'e
Kuda Ai-han	83 %	53 %
Fa'an Ai-han	42 %	58 %
La Fa'an Ai-han	41 %	48 %
Kuda Ai-han &/ Kafe	83 %	53 %

Simulasaun: Se karik ... ? Kreximentu iha Agrikultura

2007 Atual

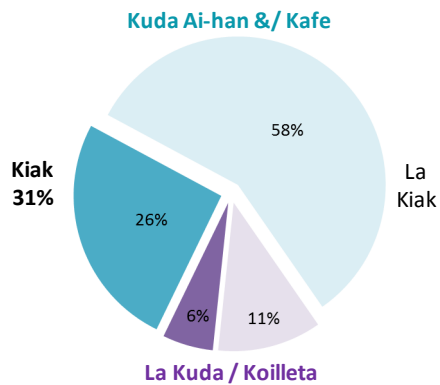
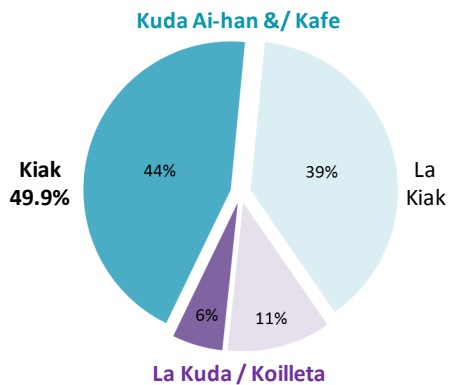


Simulasaun: Se karik ... ? Kreximentu iha Agrikultura

2007 Atual



Produsaun Hotu-Hotu
Dobrau (2x lipat)



Simulasaun: Se karik ... ? Kreximentu iha Agrikultura

- Hasa'e produsaun fini & kafé, bele atinje ka lae?
- Iha possibilidade ka lae, hodi fa'an produsaun sira ne'e hotu?
- Nato'on ona ka lae, hasa'e uma-kain ba liña pobreza nia leten?
- Iha konsekuensia / *multiplier effects* ka lae?

Simulasaun: Se karik ... ? Kreximentu iha Empregu

- Rata-rata, iha 2007 traballadór ne'ebé la'ós agrikultura hetan osan \$100 kada fulan.
- Se karik ita hasa'e to'o dobradu (dua kali lipat) númeru uma-kain ho rendimentu empregu (hosi 22% ba 44%), no aloka rendimentu adisionál ida-ne'e ba uma-kain ne'ebé mak seidak hetan rendimentu empregu ...

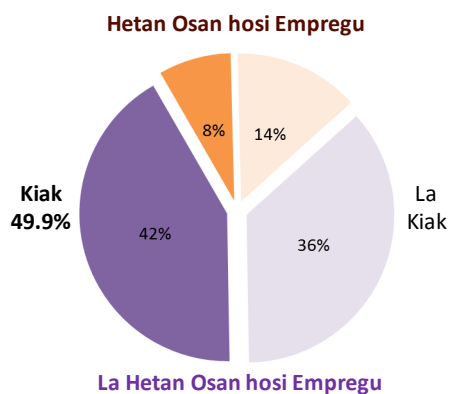
...Saida mak sei akontese ba taxa pobreza?

Simulasaun: Se karik ... ? Kreximentu iha Empregu

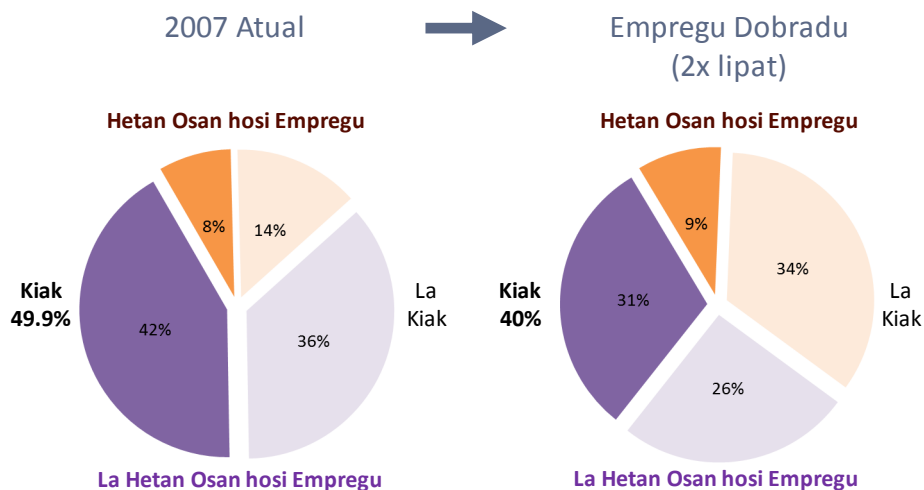
	% Populasaun	Taxa Pobreza entre Uma- kain hirak ne'e
Hetan Rendimentu hosi Empregu	22%	36.6%
La Hetan	78%	53.5%
Totál	100%	49.9%

Simulasaun: Se karik ... ? Kreximentu iha Empregu

2007 Atual



Simulasaun: Se karik ... ? Kreximentu iha Empregu



Oinsá mak bele Hasa'e Produsaun Agríkola?

Ami observa aproximasaun tolu ne'ebé bele
hala'o hamutuk:

1. Fó atensaun ba dezafiu-sira
2. Defini objetivu
3. Kria oportunidade

1. Fó atensaun ba Dezafiu-sira

Identifika no fó atensaun ba dezafiu prinsipál sira.

Por ezemplu ...



Why has growth in agricultural production been slow?



No detailed study has been done on this issue. But likely causes are:

Poor Incentives

- Access to money in rural areas from pensions, remittances, labor on PDID schemes *arguably* means that there is less incentive to work long hours to produce food to sell
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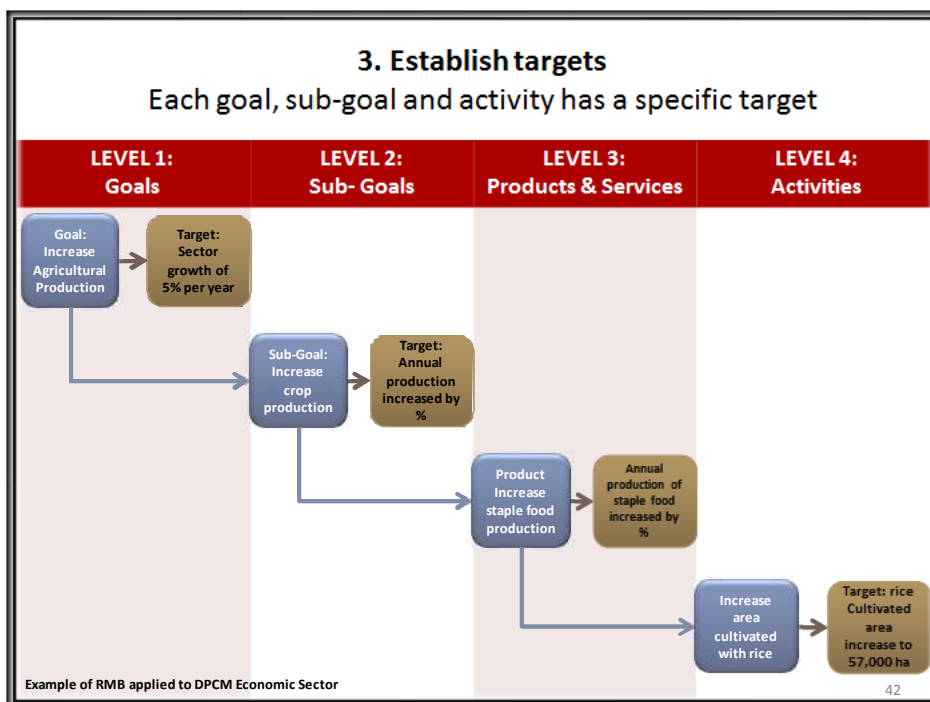
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2. Objektivu, Responsabilidade & Target

Aplikasaun ida ba Jestaun Bazeia ba Rezultadu (*result-based Management*) :

- Defini objetivu jerál no sub-objetivu ne'ebé detallada
- Fó responsabilidade klaru ba traballadór sira hodi servisu atinje objetivu hirak ne'e
- Defini target ne'ebé uza hodi sukat progresu

Por ezemplu ...



3. Oportunidade iha Agrikultura

Saida mak daudaun ne'e la'o di'ak? Saida mak bele transforma an no sai di'ak liu tan se hetan apoiu no enkoraja?

1. Programa dezvoltimentu lokál rural ne'ebé tau matan ba fornimentu (*supply chain*) tomak.
2. Foka ba tipu produsaun no produtór sira ne'ebé mak iha produsaun ne'ebé barak liu (*surplus*) ba mekadoria agora daudaun. Foka mós ba sira ne'ebé iha poténsia boot ba mekadoria.
3. Fasilidade prosesamentu ai-han.

Sumáriu

- (1) Planu Estratéjiku Dezenvolvimentu (SDP) estabese orientasaun balun ne'ebé luan, no estabese prioridade-sira.
- (2) Difisil tebes atu atinje progresu iha area balun duke area sira seluk.
(ezemplu Agrikultura, Edukasaun no setór privadu)
- (3) Redusaun boot iha pobreza bele atinje liuhosi kreximentu modestu iha setór ne'ebé iha kapitál umanu barak.
- (4) Ami haree katak dalan kapás ida mak foka ba apoiu no espande programa sira ne'ebé mak funsiona ka la'o ho di'ak ona.