

Sustentabilidade Fiskál ba Timor-Leste

husi Charles Scheiner
La'o Hamutuk
11 Juñu 2014



Estatística básiku

- Liu 50% povu moris iha liña pobreza nia okos.
- 80% povu hela iha area rurais, moris ho agrikultura subsistensia.
- Liu 1,200 labarik ho idade menus tinan lima mate kada tinan husi kondisaun bele prevene ... maizumenus dala 20 ema na'in hira mate husi violénsia fizika.
- Labarik barak liu mate husi diarreha duke malaria.

Estatística básiku

Molok tinan 2021, 250,000 labarik tan sei moris, no kampu mina no gas hotu ona.

Oinsá sira bele moris?

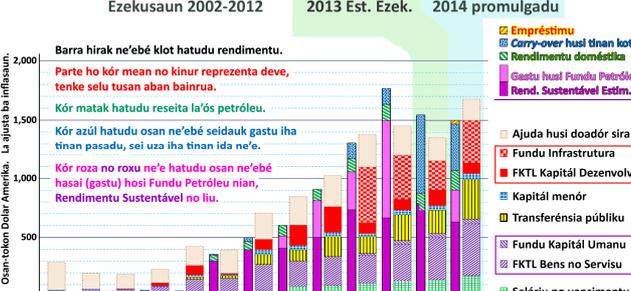
Dependénsia Petróleu

- Projeta ba Reseita estadu iha 2014:..... token \$2,380 token \$2,213 (93%) sei mai hosi mina-rai (inkl. token \$770 hosi retornu investimentu) token \$ 166 (7%) hosi rekursu naun petróleu
- OJE 2014..... token \$1,500 token \$903 (60%) hosi Fundu Petrólíferu iha 2014. token \$430 (29%) tan hosi FP ohin no futuro. (Rollover no tusan)
- PIB/ GDP naun petrólíferu iha 2011:..... token \$1,047 GDP petrólíferu iha 2011:..... token \$3,478 Produtivu (agrikultura & fabrika) token \$179 (4%) no hatún
- Balansu komérsiu (2013): token \$694 ba importasaun, token \$18 ba esportasaun (98% café).
- Reseita husi petróleu ba estadu, la'ós ba povu.

Sudan Súl, Libia (no Guinea Ekuatorial?) iha nasaun rua de'it iha mundu depende liu Timor-Leste ba esportasaun mina no gas.

Panorama: Montante OJE sa'e maka'as

Gastu no Reseita Estadu nian durante ne'e (inklui ajénsia auton.)
Ezekusaun 2002-2012 2013 Est. Ezek. 2014 promulgadu



Barra hirak ne'ebé klot hatudu rendimentu.
 Parte ho kór mean no kinur representa deve, tenke selu tusan aban bainrua.
 Kór matak hatudu reseita la'ós petróleu.
 Kór azul hatudu osan ne'ebé seidak gastu iha tinan pasadu, sei uza iha tinan ida ne'e.
 Kór roza no roxu ne'e hatudu osan ne'ebé hasai (gastu) hosi Fundu Petrólíferu nian, Rendimentu Sustentável no liu.

Gráfiu ne'e husi La'o Hamutuk bazeia ba dadus no projeksau hirak Ministériu Finansas RDTL. 23 Janeiru 2014.

OJE 2014 seidak fó prioridade ba edukasaun, agrikultura no saúde.

Proposta Orsamentu Estadu 2014 (\$1,500 token dolar EUA)

Infrastrutura	Governasaun	Servisu	Subsidiu	Dezenvolv.	Seguransa	Seluk
t\$598 40%	t\$228 15%	t\$247 17%	t\$222 15%	t\$86 6%	t\$90 6%	t\$30 2%

Electricidade \$171

Infrastrutura seluk \$62

PDID/PDL/PDD \$93

ADN \$30

Estrada no Ponte \$128

Tasi Mane \$52

Portu no aeroporto seluk \$39

Be'e no saneamentu \$25

Infrastrutura seluk \$62

Admin. \$110

Ezekutivu \$51

Legislativu \$27

Judisial \$40

Saude \$76

Edukasaun \$171

Veteranu \$87

Seguransa sosial \$39

Uma MDG \$23

Protesaun sosial seluk \$74

Ekonomia \$51

Agrikultura \$34

PNTL \$46

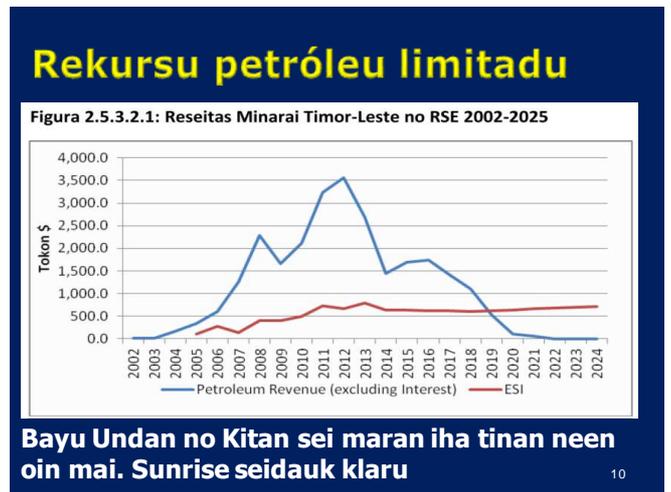
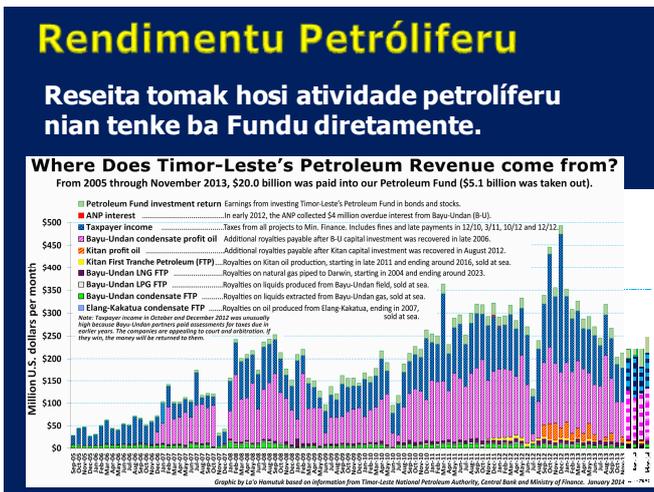
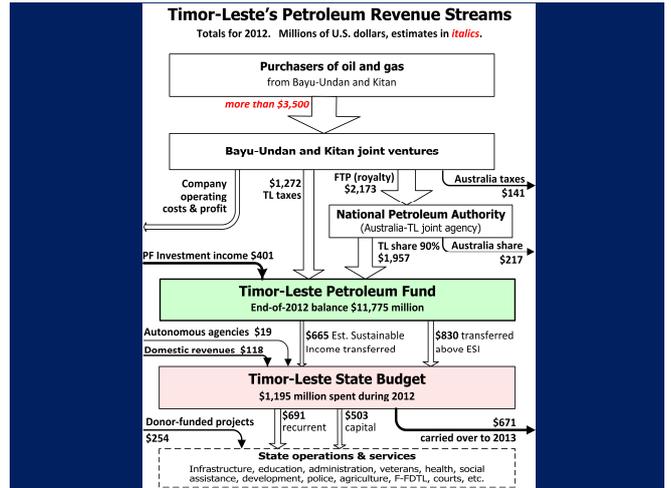
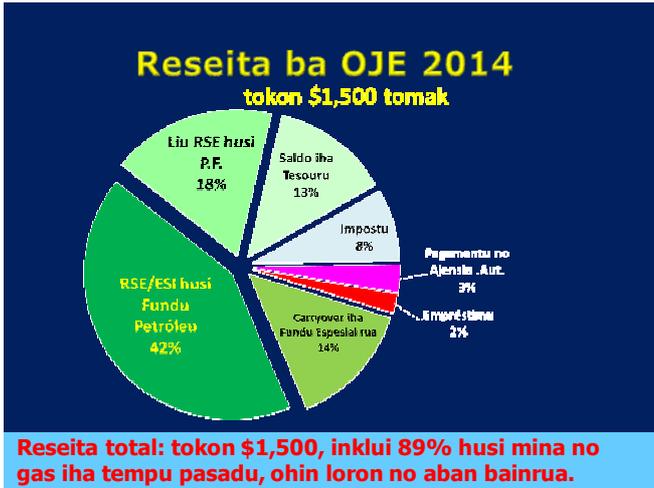
Seguransa seluk \$8

F-FDTL \$37

Continjensia \$25

Seluk \$5

Gráfiu La'o Hamutuk nian bazeia ba Proposta Orsamentu Jeral Estadu RDTL 2014, Outubro 2013



Ita nia mina sei hotu kedas!

Tabela 2.5.3.2.2: Rikusoin Minarai no RSE, Token \$

	2013 BB1	2014 Orsamentu	2015	2016	2017	2018
Rendimentu Sustentável Estimadu (PWx3%)	787.0	632.3	638.7	628.4	616.0	612.8
Total Rikusoin Minarai (PW)	26,231.7	21,076.3	21,291.0	20,947.4	20,534.9	20,425.9
Saldu Loke Fundu Minarai	10,776.7	14,058.5	15,369.0	16,431.1	17,548.5	18,723.9
Valor Likidu - Prezente Futuru Reseitas nian	15,455.0	7,017.8	5,922.0	4,516.3	2,986.4	1,702.0

Fonte: Unidade Administrasaun Fundu Minarai

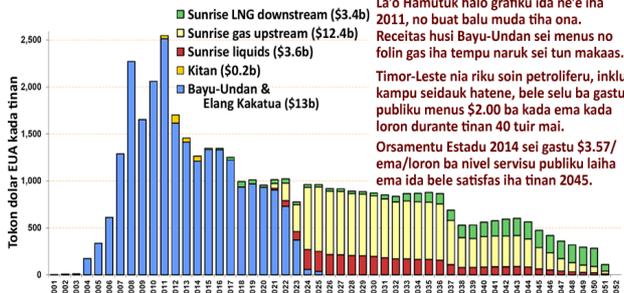
Tabela ida ne'e, husi OJE 2014, hatudu katak reseitas mina sei tun lalais, kuandu RSE monu kada tinan.

Timor-Leste laiha mina barak

	Timor-Leste	TL laiha Sunrise	Australia
Rikusoin mina no gas ba kada sidadaun	800 barril	310 barril	1,180+ barril
Bele kontinua tinan hira ho taxa produ-saun 2012	Tinan 14	Tinan 5	Tinan 58+

Reseita Petrolifeiru Anual ba Timor-Leste (deskontu 3.7%/tinan)

Karik kanstrusaun Sunrise harii iha tinan 2016



La'o Hamutuk halo grafiku ida ne'e iha 2011, no buat balu muda tiha ona. Reseitas husi Bayu-Undan sei menus no folin gas iha tempu naruk sei tun makaas. Timor-Leste nia riku soin petroliferu, inklui kampu seidauk hatene, bele selu ba gastu publiku menus \$2.00 ba kada ema kada loron durante tinan 40 tur mai. Orsamentu Estadu 2014 sei gastu \$3.57/ema/loron ba nivel servisu publiku laiha ema ida bele satisfas iha tinan 2045.

Modelu ida ne'e

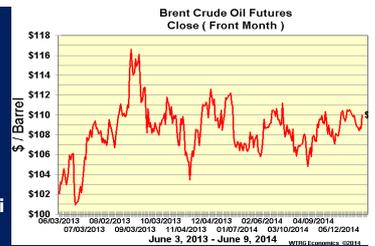
- Halo projesaun ba reseita no gastu estadu nian, bazeia ba kontestu atuál, fatór esterna no dezizaun iha futuru.
- La koko estimatiza makro-ekonomia: laiha PIB/GDP, inflasaun, pobreza ka balansu komérsiu ... ka ligasaun fraku sira.

Rezultadu

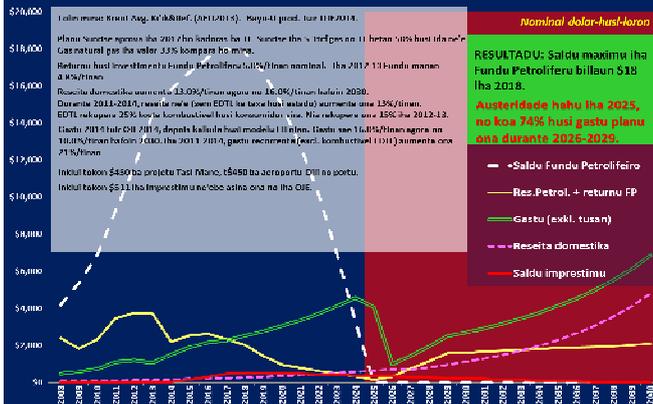
- Reseita no gastu kada tinan
- Saldu iha Fundu Petrolíferu
- Saldu seidauk selu fali husi deve
- Gráfika sira la hatudu:
 - Rendimentu Sustentavel Estimadu
 - Kompozisaun despeza: rekurrente, tusan, manutensaun, kapitál menór no dezenvolvimentu
 - Kompozisaun reseita: EDTL, emprestimu, taxa doméstika, mina no gas, retorno investimentu husi Fundu Petrolíferu

Asumsaun bele koko

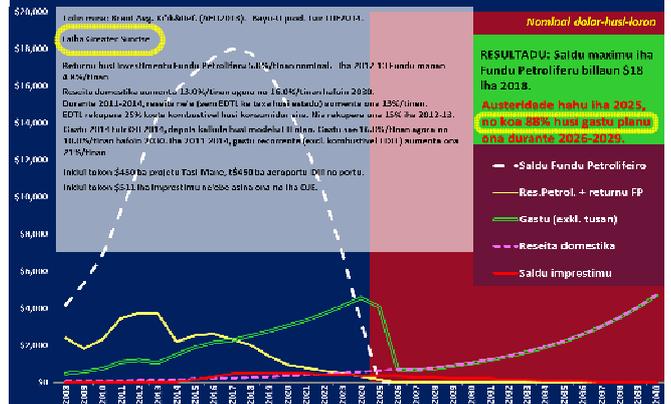
- Inflasaun global, populasaun, TL
- Folin mina no gas
- Produsaun bele hetan husi Bayu-Undan no Sunrise
- Dezenvolvimentu Greater Sunrise: karik, bainhira, iha ne'ebé no fahé reseita
- Retorno husi investimentu Fundu Petrolíferu
- Reseita doméstika, inklui rekuperasaun gastu EDTL ba kombustível
- Despeza recurrenente, inklui manutensaun infraestrutúra kapitál
- Despeza kapitál: PPP no Tasi Mane
- Emprestimu
- "Yellow Road" no senáriu sustentavel seluk

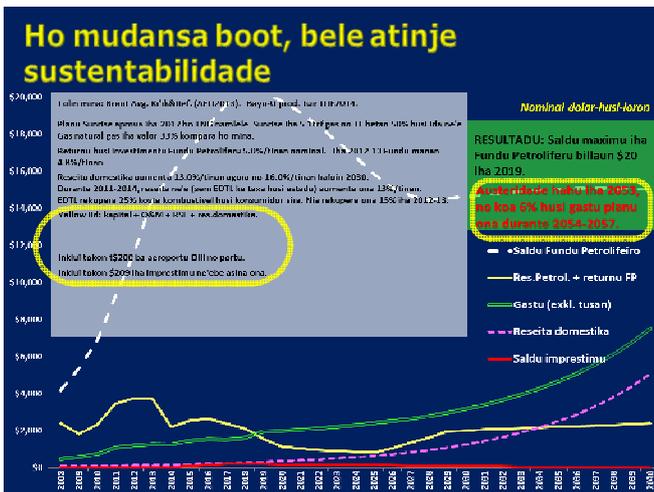
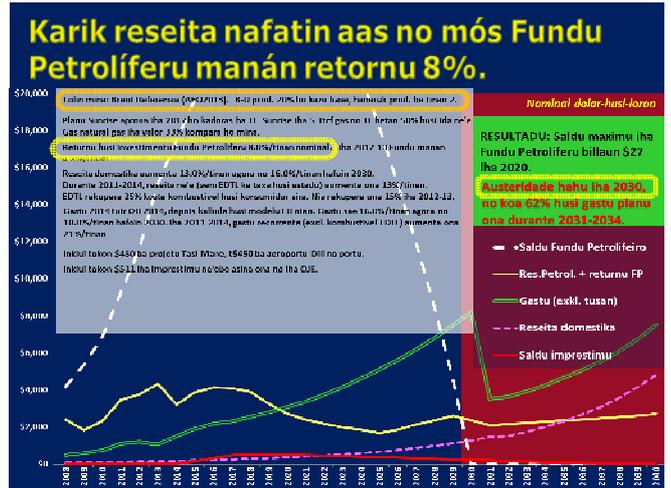
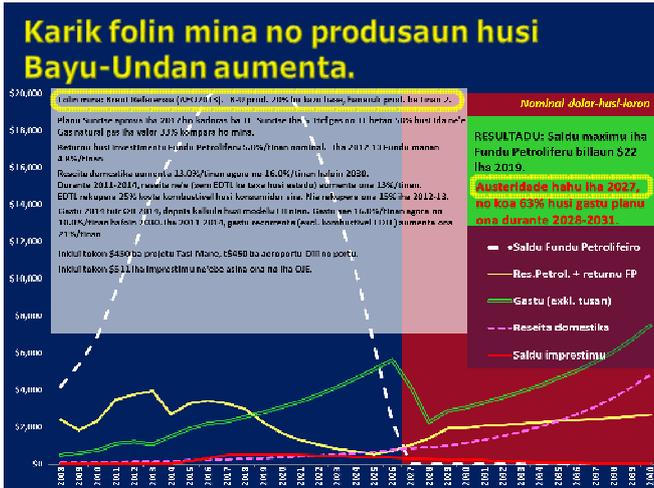


Se ita kontinua iha dresaun agora, TL labelu selu ba OJE iha tinan 11 tur mai.



Karik projektu Sunrise la la'o...



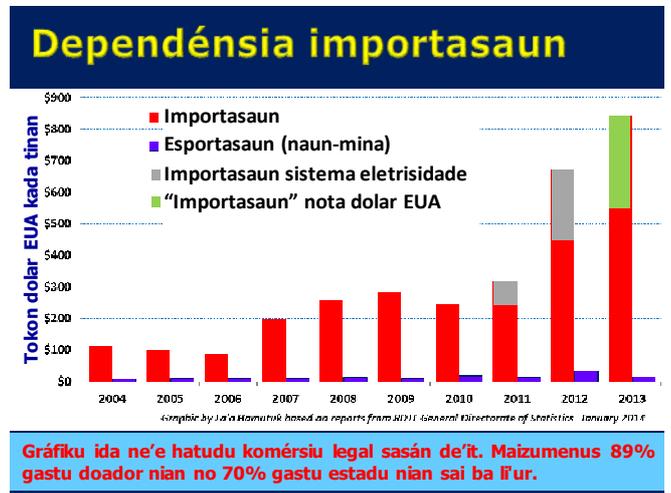


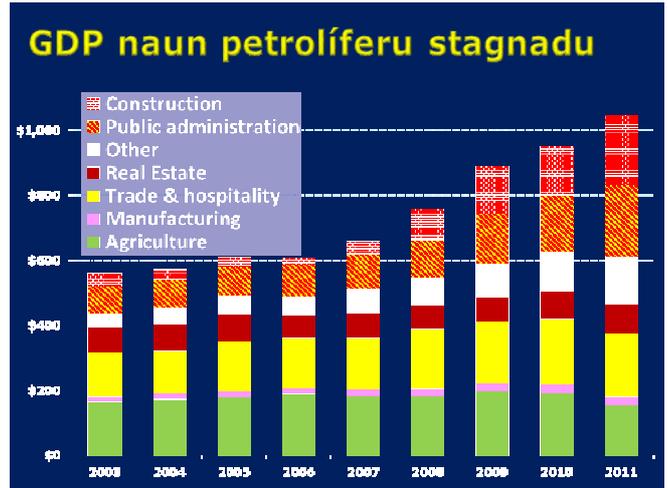
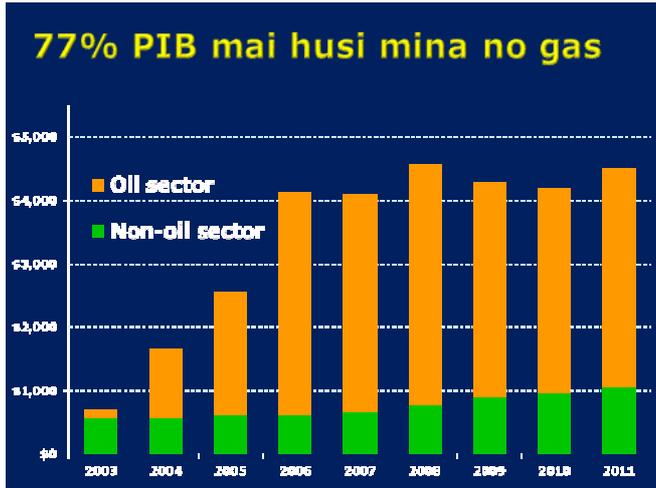
Efeitu hosi mudansa iha presu no produsaun petróleu

Senáriu	Rezultadu					Mina no gas					
	Orsamentu Pre-austeriy	Austeriy hahú	Austeriy nivel/ kle'an	Saldu másimu FP	Tinan másimu FP	Presu Petróleu (Brent)	Prod. Bayu-Undan	Sunrise LNG iha	Akordu Sunrise (tinan)	Reserva Sunrise (td)	Rasio presu Gas/mina
Kazu Referénsia	\$5.1	2026	67%	\$19	2019	Ref.	Est. 2013	Beasu	2017	5.13	33%
Presu mina-rai as	\$5.7	2027	60%	\$22	2019	Rata-rata as no ref.	Est. 2013	Beasu	2017	5.13	33%
Presu mina-rai k'fik	\$4.6	2025	74%	\$18	2018	K'fik no ref.	Est. 2013	Beasu	2017	5.13	33%
Rezerva boot Bayu-Undan	\$6.2	2028	63%	\$21	2021	Ref.	Est. 2012	Beasu	2017	5.13	33%
LNG namlele ba Sunrise	\$5.1	2026	70%	\$19	2019	Ref.	Est. 2013	FUNG	2017	5.13	33%
Sunrise adia ba tinan neen ka liu	\$5.1	2026	88%	\$19	2019	Ref.	Est. 2013	Beasu	2013	5.13	33%
Presu gas k'fik	\$5.1	2026	69%	\$19	2019	Ref.	Est. 2013	Beasu	2017	5.13	25%
Rezerva boot Sunrise	\$5.1	2026	62%	\$19	2019	Ref.	Est. 2013	Beasu	2017	7.00	33%

Efeitu hosi mudansa iha retornu investimentu, kreximentu rendimentu no despeza

Senáriu	Rezultadu					Reseita					Despeza	
	Orsamentu molok austeriy	Austeriy y hahú	Nivel Austeriy	Saldu másimu FP	Tinan másimu FP	Retornu sa'e invest. FP	Reseita sa'e 2015-	Reseita sa'e 2031-	Kustu rekuper a EDTL	O&M infra. Anual	Despeza sa'e 2015-	Despeza sa'e 2031-
Kazu Referénsia	\$5.1	2026	67%	\$19	2019	5%	13%	16%	25%	8%	16%	10%
7% retorno Fundu Petrol.	\$5.6	2027	63%	\$22	2019	7%	13%	16%	25%	8%	16%	10%
3% Retorno Fundu Petrol.	\$4.6	2025	72%	\$17	2018	3%	13%	16%	25%	8%	16%	10%
Kreximentu res.dom. as	\$5.1	2026	63%	\$19	2019	5%	15%	18%	25%	8%	16%	10%
Kreximentu res.dom. k'fik	\$5.1	2026	69%	\$19	2019	5%	11%	14%	25%	8%	16%	10%
Kreximentu despeza as	\$5.3	2025	76%	\$19	2019	5%	13%	16%	25%	8%	18%	12%
Kreximentu despeza k'fik	\$4.8	2027	55%	\$20	2019	56%	13%	16%	25%	8%	14%	8%
Rekupera 75% EDTL nia kustu kombustivel	\$5.1	2026	65%	\$19	2019	5%	13%	16%	75%	8%	16%	10%

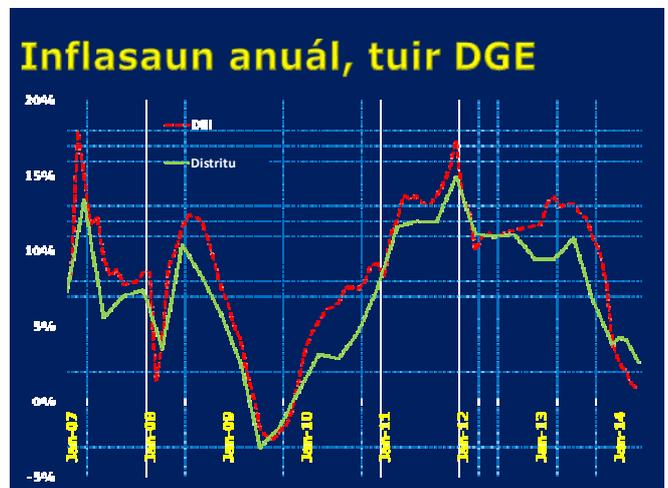




Timor-Leste muda kada tinan.

- Populasaun**
 Aumenta 2.4% kada tinan. Iha tinan 29 tan, populasaun dupla, no "baby boom" (hafoin funu) sa'e inan no aman sira.
- Inflasaun**
 Folin ba konsumidór sa'e liu 11% iha 2012, maibé tun ba 4% iha 2013.

Povu nia neseseidade no hakarak sei aumenta kuandu nasaun dezenvolve.

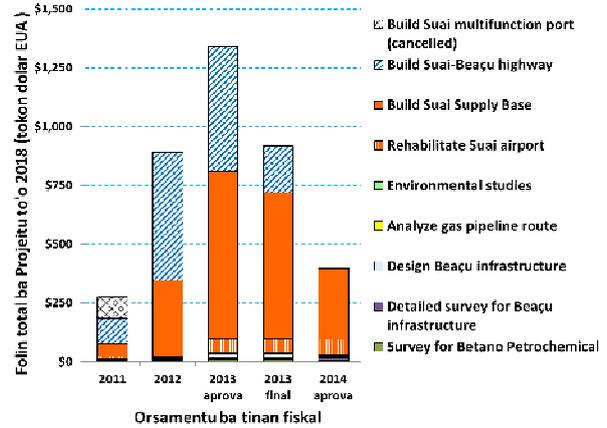


Projetu infrastrutura Petróleu Tasi Mane

- TL hahú servisu ba korredór petróleu Tasi Mane iha 2010.
- Durante 2011-2013, TL gastu ona tokon \$35.
- Folin projetu tomak bele liu billaun \$2 (liu karik Timor-Leste selu ba refinaria, kadoras, ka planta LNG).
- OJE 2014 sei gastu t\$46 iha 2014 no t\$320m iha 2015-2018, maibé lakon buat barak.



Projetu Tasi Mane tomak folin hira?



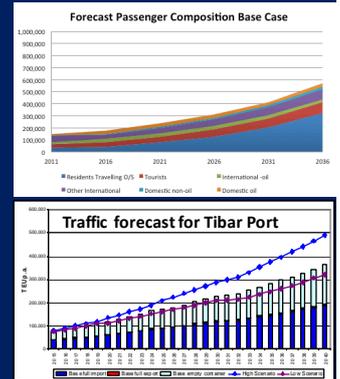
Konsekuénsia hosi TMP:

- TMP Halo TL depende liu tan ba setór petrolíferu.
- Kusta boot liu fali returno.
- Haluha setór sustentavel (agrikultura, turizmu, indústría ki'ik nsst).
- Besik osan tomak gasta ba kompañia estranjeiru, fornese kampu servisu uitoan de'it.
- Sei kria problema sosiál, hadau rai, eviksaun, implikasaun ba saúde no degrada no amesa ba ambiente.

Karik Sunrise la dada mai iha TL? Projetu ne'e atu ba saida tan?

Harii portu no aeroportu boot liu

- IFC fó korajen ba TL atu harii portu no aeroportu boot liu duke trafiku bele justifika.
- Oinsá Timor-Leste bele selu ba defisit komérsiu bainhira mina no gas maran ona?



PPP

Portu Tibar

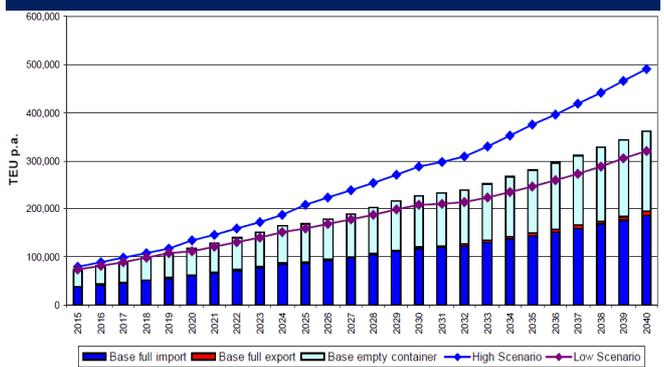
- Parte hosi projetu Parsieridade Públiku-Privadu
- IFC (Grupu Banku Mundial) tau matan ba ida ne'e
- IFC projetu katak Timor-Leste sei importa sasán maka'as
- Est. kapitál investimentu tokon \$300-400



Portu Tibar Hosi Fundu Infrastrutura iha OJE 2014

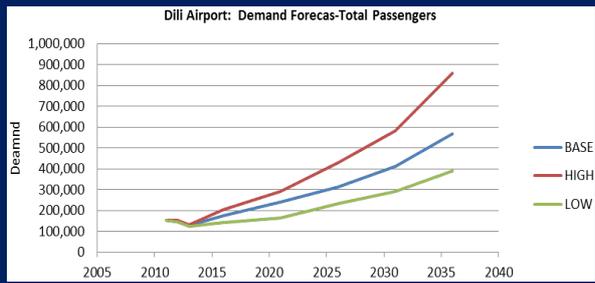
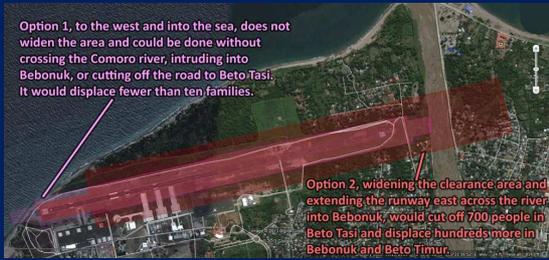
Gasta 2012	2013	2014	2015	2016	2017	Hafoin 2017
0.7	1.5	3.5	20.4	109.5	9.9+	liu

Senáriu IFC nian ba importasaun



Aeroportu Dili

- Parte hosi PPP ne'ebé IFC mak tau matan, ka husi governu Malázia
- Ekspeta bele fasilita ema Timor na'in 300,000 bele semo tinan-tinan



Hosi Fundu Infrastrutura iha OJE 2014

	Gastu 2012	2013	2014	2015	2016	2017	Hafoin 2017
Aeroportu Dili (RDTL)	0	1	5.6	53.6	68.9	30.6	100
Aeroportu Dili (empréstimu)			2	15.5	25	40	14.0+

tokon \$2.5 aloka iha 2014 atu rehabilita pista

Zona Merkadu Espesiál iha Oekusi



- Saida mak vantage kompetitivu iha Oekusi?
- ZEESM bele justifika investimentu billaun \$4?

Se mak hetan benefisiu: Oekusi sira ka politiku na'in sira?

TL sai devedor.

- Lei iha 2009 fó dalan.
- Tinan 2012 Timor-Leste asina kontratu sira atu empresta tokon \$107 hosi Japaun no ADB.
- Iha 2013 TL asina kontratu rua tan ho ADB no Banku Mundial ba tokon \$90.
- Iha OJE 2014 Timor-Leste sei deve tokon \$31.
- Durante 2014-2018, TL hakarak empresta tokon \$500. Hare OJE ba infrastrutura:

Year	2014	2015	2016	2017	2018
Amount	\$31m	\$117m	\$158m	\$140m	\$37m

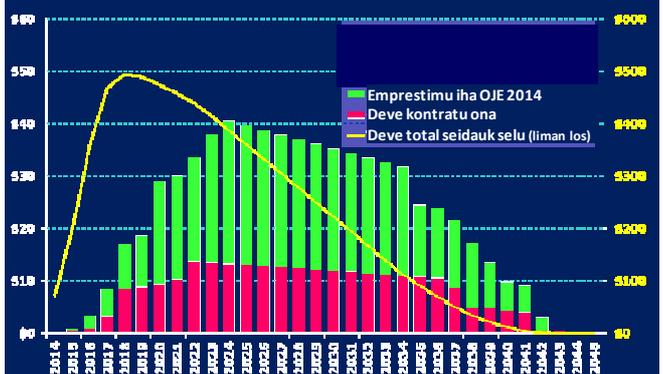
Empresta atu halo estrada

Projetu sira ne'ebe finansia ho osan imprestimus husi 2012-2016

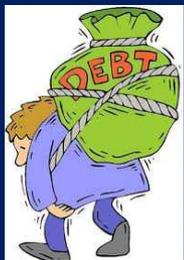


Tenke selu tusan fali.

Pagamentu anuál (tokon dolar EUA)



Buat ruma importante atu hanoin



- Ezekusaun SDP sei presiza empresta dolar billaun ruma, ho taxa funan komersial.
- Maski funan konsesional, atu selu fali deve sei hatun osan iha Fundu Petroliferu. Deve iha yen, selu iha dolar, la bele kontrola.
- TL nia mina no gas limitadu, naun-renovable, no la bele hatene folin iha futuru.
- Maski osan laiha, GoTL tenke prioritiza atu selu tusan uluk, molok dezenvolve povu.
- Ita nia oan no be-oan sira hetan tusan hafoin kampu mina no gas maran ona.

Uza www.laohamutuk.org

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 Institut Perencanaan dan Analisis Pembangunan Timor-Leste

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Obrigado barak.

Bele hetan informasaun tan no atualiza iha

- La'o Hamutuk nia website <http://www.laohamutuk.org>
- La'o Hamutuk nia blog <http://laohamutuk.blogspot.com/>
- Refere ba USB referensia 16GB husi La'o Hamutuk.
- Karik hakarak uza grafiku balun husi LH, husu de'it.

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