



SDP Monitoring Report 2024 & Medium-Term Plan 2027 - 2030

*“Strengthening Integrated Strategic Planning for Sustainable
and
Inclusive Development”*

Launching of SDP Monitoring Report 2024 and MTP 2027-2030
Dili, 1st October 2026

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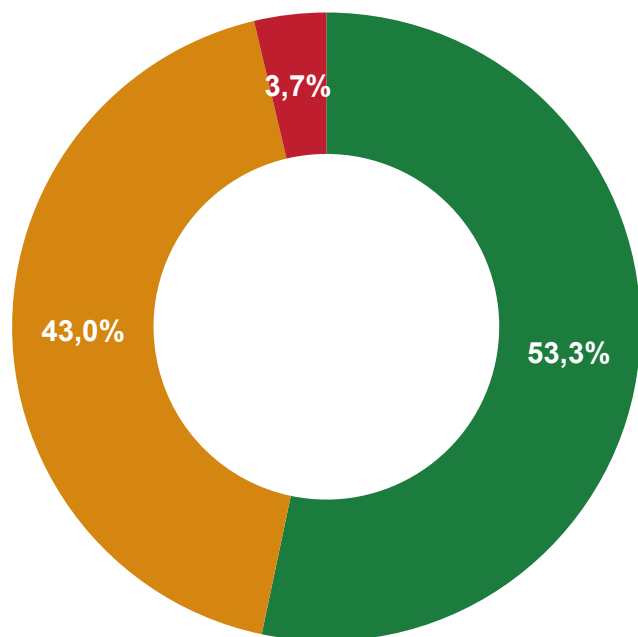
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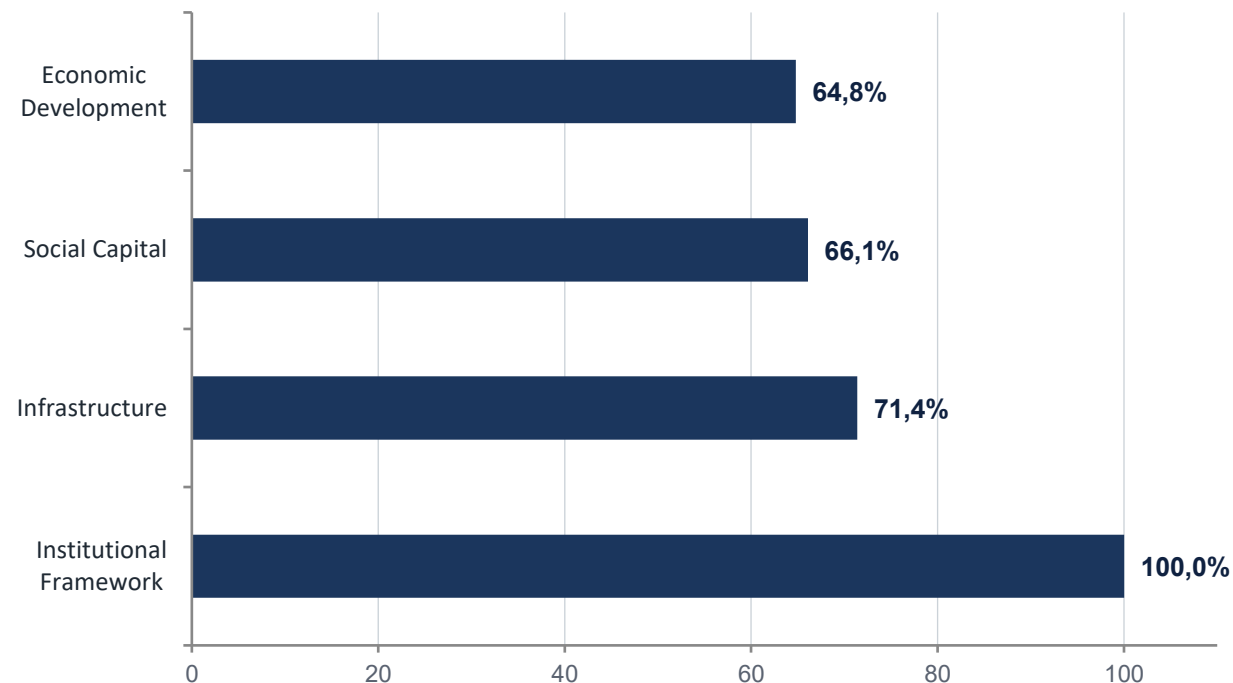
Summary of SDP Implementation Progress 2011–2024

Overall SDP Achievement (n=199 targets)



■ Completed / advanced (53.3%) ■ Partial progress (43.0%)
■ Limited progress (3.7%)

Achievement by Priority Sector (%)



Implication for the MTP: The final and most decisive phase of the Strategic Development Plan (SDP) 2011–2030

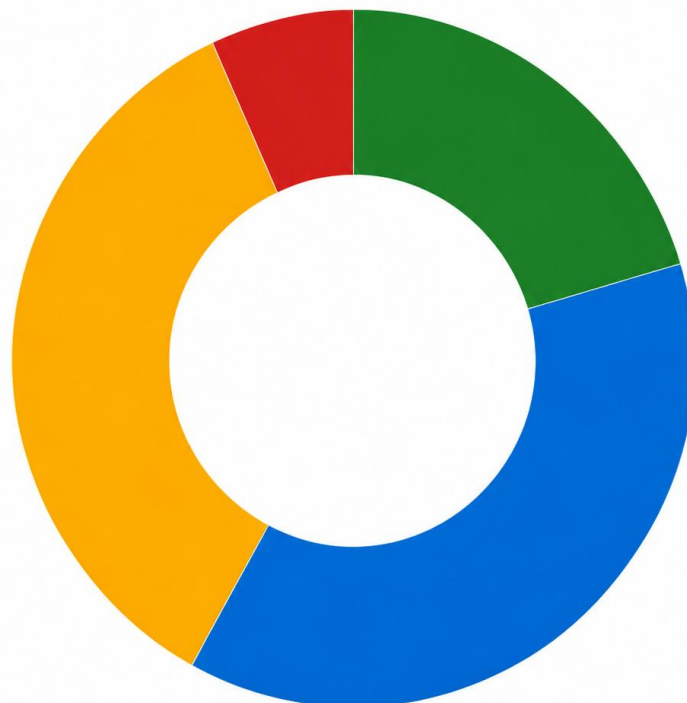


SDP Progress in Social Capital and Institutional Development Sectors



Sector: Social Capital

62 targets | Overall score: 66.13%



- Completed (21%)
- Advanced (37%)
- Partial (36%)
- No progress (6%)

Sector: Institutional Framework

44 targets | 100% with progress



- Completed (14%)
- Advanced (61%)
- Partial (25%)
- No progress (0%)



SDP Progress in Infrastructure and Economic Development Sectors



Sector: Infrastructure Development | 42 targets | 71.4% (positive execution)



- Completed (24%)
- Advanced (16%)
- Partial (55%)
- No progress (5%)

Sector: Economic Development | 49 targets | Overall score: 64.8%



- Completed (21%)
- Advanced (22%)
- Partial (55%)
- No progress (2%)

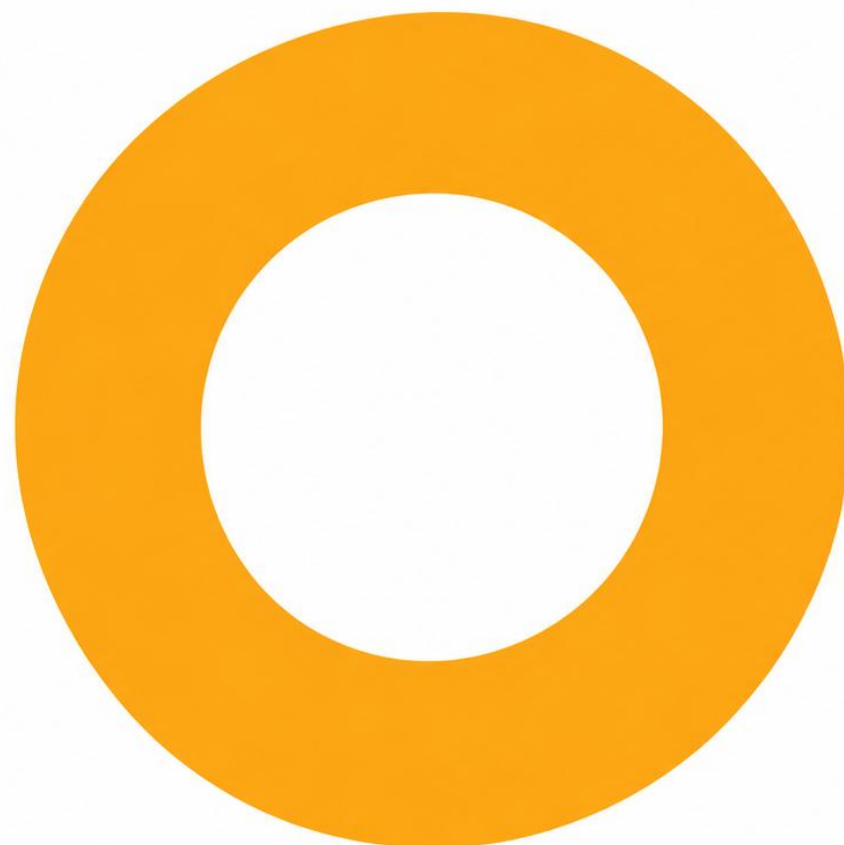


SDP Progress in Macroeconomic Outlook



Sector: Macroeconomic Outlook

2 targets | Partial progress (2/2)



- Completed (0%)
- Advanced (0%)
- Partial (100%)
- No progress (0%)

COUNTRY REFLECTIONS

Achievements vs. Remaining Gaps

KEY ACHIEVEMENTS (2011–2024)

32
Global Peace
Index

Timor-Leste as one of the peaceful and safest countries in the world : G7+, CPLP, ASEAN and Globally.

99.7%

National electrification coverage of towns & villages+ solar panel (PED Monitoring Report -2024.pg.140)

>120%

Mobile network penetration (universal coverage) (Pg.168 – PED Monitoring 2024)

98%

Child immunisation under National Vaccination Plan (Pg.122– PED Monitoring 2024)

77%

Rural water access (2022) - exceeded 75% target (Pg.77– PED Monitoring 2024)

74%

Urban sanitation coverage (2022) - exceeded 60% target (Pg.138- PED Monitoring 2024)

48,269

Businesses registered via SERVE.I.P. (2014-2024) (Pg.205, PED Monitoring 2024)

37%

Women in National Parliament - highest in South -East Asia (Pg.52, PED Monitoring 2024)

REMAINING GAPS

32/1,000

Infant mortality - with sharp gender & territorial disparities (pg.22, PED Monitoring 2024)

17.6%

Adult literacy programme graduation rate (pg. 73, PED Monitoring 2024)

16.1%

Attendance Rate for Children and Youth with disabilities (5–29 yrs) from 3.9% participation of Attended Primary Education (pg.38, PED Monitoring 2024)

~5,000

Rural houses built: <10% of 55,000 target (pg. 259, PED Monitoring 2024)

0%

Suai Port physical progress - logistics locked (Pg.265, PED Monitoring 2024)

<5%

Renewables share of energy mix - target 50% by 2030 (pg.148, PED Monitoring 2024)

949

Formal land titles issued, of 326,111 parcels registered (pg. 317-318, PED Monitoring 2024)

STRATEGIC CONTEXT

Why the MTP Matters Now

THE CHALLENGE

Structural gaps that hold back growth

4.1%

Non-oil GDP growth in 2024 — well below the 8–11% SDP target

37%

National poverty rate; last measured 37% (LSS, 2024)

US\$1,341

Per-capita income — well below upper-middle-income threshold (\$4,600-\$14,300)

47%

Fiscal deficit as % of non-oil GDP (World Bank , 2025)

29.3%

Young people (15–24) not in employment, education or training (Sensus,2022)

24.2%

Female labour-force participation (Sensus,2022)

THE OPPORTUNITY

Enabling conditions are now in place

ASEAN

Formal accession Oct 2025 — access to 700M+ regional market

World Trade Organization

2024 membership — rules-based trade framework in place

TLSSC

Submarine cable (Jun 2024) — 27 Tbps digital capacity

Port, Airport

Tibar port operational; Dili airport expansion underway

70%

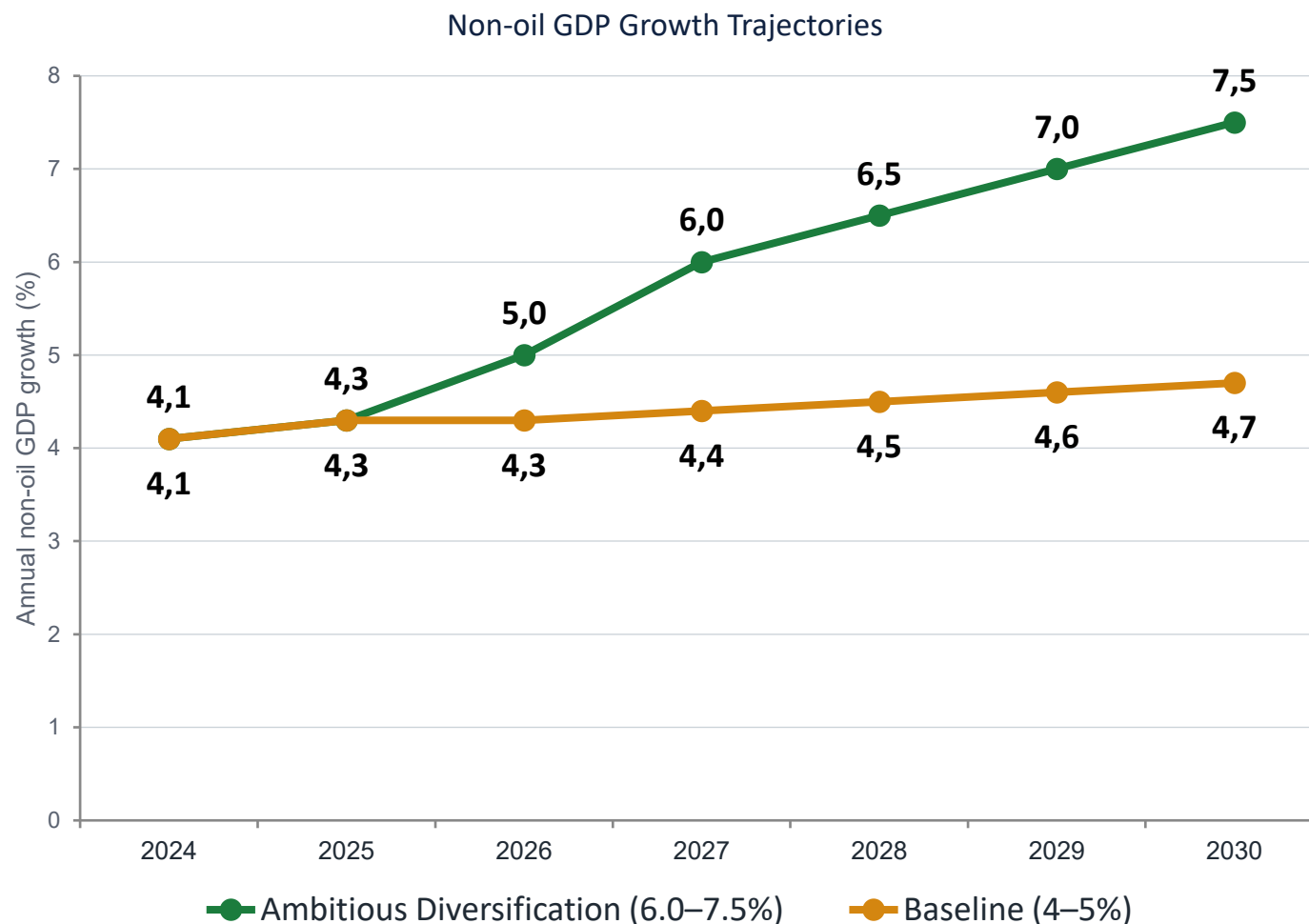
Population under age 35 — a demographic dividend

\$18.7bn

Petroleum Fund — a strategic (but finite) financing window

THE STRATEGIC OPTIONS

Two Scenarios - Ambitious Diversification Vs. Business as Usual



AMBITIOUS DIVERSIFICATION

Selected as the guiding scenario

- 6.0–7.5% growth to 2030; 7.5–8.0% beyond
- Non-oil economy doubles within a decade
- 5,000–7,000 new formal jobs / year
- Requires structural reforms + strategic investment

BUSINESS AS USUAL

Continuation of current trends

- 4–5% growth, driven by public spending
- Household income stagnant; slow poverty reduction
- Insufficient jobs for growing labour force
- Prolonged petroleum dependence

INTRODUCTION

Purpose, Legal Foundation and Strategic Alignment

The MTP serves a dual purpose - strategic guidance for the Council of Ministers, and operational direction for line ministries, municipalities, and stakeholders (partners and civil society).

DUAL PURPOSE OF THE MTP

STRATEGIC

To provide the Prime Minister and Council of Ministers with a focused set of national priorities for high-level oversight, decision-making, and budget protection.

OPERATIONAL

To deliver clear targets, results frameworks, indicators, and implementation guidance for line ministries, municipalities, development partners, and civil society.

LEGAL BASIS & STRATEGIC ALIGNMENT

LEGAL MANDATE

Decree-Law No. 68/2023 (Organic Law of MPSI); IPU designated for strategic socioeconomic planning.

LONG-TERM VISION

Final and most decisive phase of the SDP 2011–2030

GOVERNMENT PROGRAM

IX Constitutional Government Program.

GLOBAL AGENDA

Sustainable Development Goals (SDGs).

REGIONAL COMMITMENTS

ASEAN Economic Community & Socio-Cultural Community; preparation for ASEAN Chair 2029.

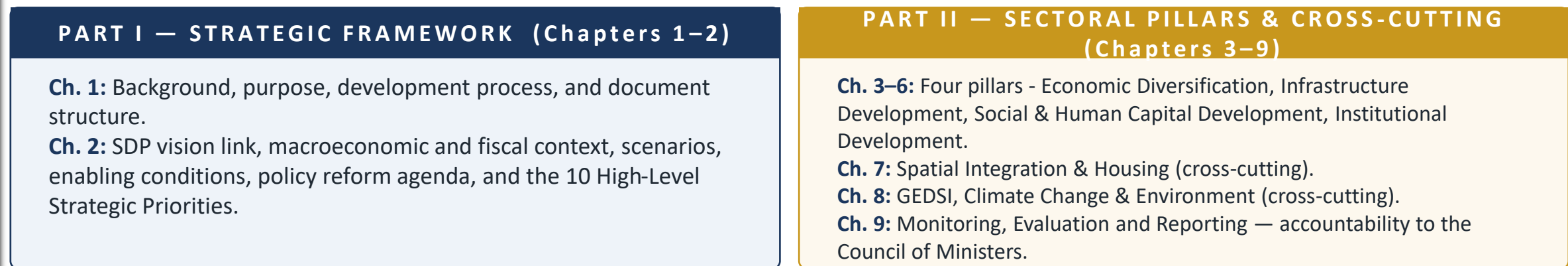
APPROACH, METHODOLOGY, STRUCTURE

How the MTP Was Prepared

DEVELOPMENT PROCESS — EVIDENCE-BASED, MULTI-SECTORAL, VALIDATED

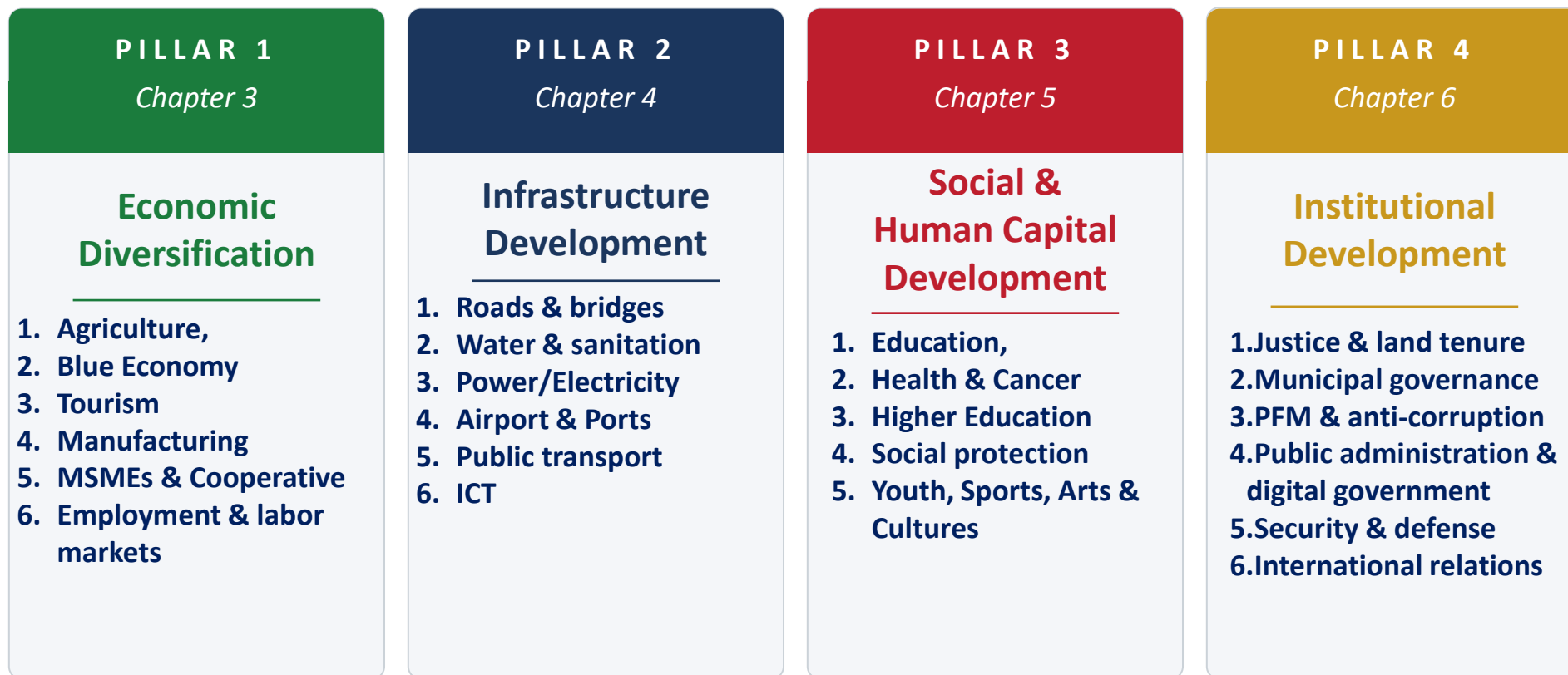


DOCUMENT STRUCTURE - TWO PARTS, NINE CHAPTERS



STRATEGIC FRAMEWORK

The Four Mutually Reinforcing Pillars



Cross-cutting (Chapter 8): Gender Equality, Disability & Social Inclusion (GEDSI) and Climate/Environment — mainstreamed across all chapters.

PILAR 1 : ECONOMIC DIVERSIFICATION: 2030 TARGETS

STRATEGIC FOCUS: From petroleum dependence to a diversified, competitive, job creation and non-oil economy

KEY 2030 OUTCOMES

1. Non-oil GDP 6.0–7.5% growth
2. Private investment 15–20% of total Non-Oil GDP
3. Non-oil exports 2–3× increase
4. **Skills that lead to jobs** : TVET participation ≥10%; ≥60% of TVET graduates accessed formal jobs in 12 months

STRATEGIC OBJECTIVES

1. Accelerate non-oil growth via agriculture, blue economy, tourism, manufacturing
2. Strengthen private sector, MSMEs, investment climate for quality formal jobs
3. Transform labor market through skills & employment services

Sub-sector	Indicator	Baseline (2025)	2030 Target
Tourism	Receipts/Income from Tourisms	US\$28M	US\$80M
Tourism	Community tourism Routes	18	50
MSMEs	MSMEs with formal financial products	19.1%	≥35%
Manufacturing	Cumulative formal jobs created	4,900 (BAS 2024)	10,000
Agriculture	Coffee export value	US\$17.7M	+≥50%
Agriculture	Functional irrigation area (ha)	43,834	70,000
Employment	New formal private-sector jobs / yr	~3,600 (2021–24 avg)	5,000–7,000

PILAR 2: INFRASTRUCTURE DEVELOPMENT: 2030 TARGETS

STRATEGIC FOCUS: Shift from build-out to reliability, financial sustainability, and climate resilience; connect production zones to markets and close infrastructure gaps

KEY 2030 OUTCOMES

- 1. Connected corridors.** : All-season farm and tourism access; travel time and freight costs down $\geq 20\%$.
- 2. Universal basic services** : 24/7 electricity, safe water for all, and 90% rural water-system functionality.
- 3. Sustainable utilities** : EDTL cost recovery $> 80\%$, NRW $< 65\%$, and subsidies halved from 7–9% of GDP.
- 4. Climate-resilient assets** : $\geq 50\%$ renewable power, with $> 80\%$ of assets climate-proofed.
- 5. Trade- and digital-enabled economy.** : Non-oil exports $\geq 5\%$ of Tibar cargo; $\geq 65\%$ internet coverage (online)

STRATEGIC OBJECTIVES

1. Accelerate diversification: connect production zones to markets & high-value sectors
2. Strengthen fiscal sustainability & asset management to protect public investments
3. Strengthen institutional governance and regulatory frameworks to improve service delivery, operational efficiency, and accountability.

Sub-sector	Key indicator	Baseline 2025	Target 2030
Roads & Bridges	National roads in good/fair condition	48%	$\geq 85\%$
	Municipal roads in good/fair condition	6.9%	$\geq 45\%$
Water & Sanitation	Households with safely managed water	87%	100%
	Non-Revenue Water (urban)	$\sim 85\%$	$< 65\%$
Electricity	Sucos with reliable 24/7 electricity supply	$\sim 70\%$	100%
	Electricity system losses	$\sim 33\%$	$< 25\%$
	Renewable share of energy	$< 5\%$	$\geq 50\%$
	EDTL cost recovery ratio	$\sim 32\%$	$> 80\%$
Maritime & Aviation	Non-oil exports via Tibar Bay Port (% of throughput)	$\sim 1.3\%$	$\geq 5\%$
Public Transport	Dili urban routes with scheduled services	$\sim 0\%$	$\geq 60\%$
Digital Infrastructure	Population using the internet	34.5%	$\geq 65\%$
	Businesses using digital payment/finance	0.8%	$\geq 20\%$

PILAR 3 :SOCIAL & HUMAN CAPITAL DEVELOPMENT: 2030 TARGETS

STRATEGIC FOCUS : Strengthen human capital to drive labour productivity and equitable growth and improved Universal Health Coverage and Cancer Control System in Place

KEY 2030 OUTCOMES

- 1. Stronger foundational learning :** Grade-3 literacy >50%; >95% teachers certified;
- 2. Healthier mothers and children:** Stunting $\leq 35\%$; >90% facility readiness; UHC Service Coverage Index 80
- 3. Cancer control system built :** National Cancer Registry operational ; HPV vaccine coverage $\geq 80\%$; overseas referral costs reduced by 50%
- 4. Skills that lead to jobs :** TVET participation $\geq 10\%$; $\geq 60\%$ of TVET graduates accessed formal jobs in 12 months
- 5. Wider protection and inclusion :** Social protection 40%; women in labour force $\geq 35\%$; youth NEET $\leq 22\%$

STRATEGIC OBJECTIES

- 1) Improve foundational learning, teacher quality & education readiness
- 2) Improve health status, nutrition, cancer prevention & UHC coverage
- 3) Strengthen social protection coverage, focusing on targeting and fiscal sustainability.
- 4) Enhance youth skills according to market demand, strengthen cultural identity, promote creative industry, strengthen essential infrastructure for sports, youth, arts and culture.

Sub-Sector	Indicator	Baseline (2025)	2030 Target
Education	Grade-3 minimum literacy proficiency	~30%	>50%
Education	TVET participation (upper secondary)	2.6%	10%
Health	Child under-5 stunting	45%	$\leq 35\%$
Health	Maternal mortality (per 100,000)	195	≤ 90
Health	National Cancer Registry,	Not in place	Operational
Health	National Cancer Prevention & Treatment	7.6% received treatment	$\geq 50\%$
Social Protection	Social protection coverage	27%	40%
Arts & Culture	Cultural heritage (tangible and intangible) documented, recorded and measured preservation.	6,518	12,482

PILAR 4 :INSTITUTIONAL DEVELOPMENT: 2030 TARGETS

STRATEGIC FOCUS: Transparent, Accountable Institutions, Global Integration, Enhanced National Defence and Security to Enable Private Sector-Led Growth

KEY 2030 OUTCOMES

- 1) **Judisial** case backlog reduced $\geq 60\%$; 30,000 land titles issued
- 2) **Local government that delivers:** 100% of One-Stop-Shops with full services
- 3) **Transparent, sustainable public finances:** Non-oil revenue 17.5% of GDP; anti-corruption systems in $\geq 80\%$ of institutions
- 4) **Professional, merit-based civil service :** $\geq 80\%$ in Unified Career Regime; 100% on SIGAP-FOUN and new pay system
- 5) **Secure sovereignty, active in ASEAN :** IUU losses $\leq$ US\$15m/yr; 100% of ASEAN commitments; 2029 Chairmanship

STRATEGIC OBJECTIVES

1. Strengthen the rule of law, justice and access to justice .
2. Improve public service delivery through decentralization and administrative modernization.
3. Strengthen governance accountability, and fiscal sustainability
4. Enhance the operational capability and oversight of the defense and security forces to effectively protect Timor-Leste's sovereignty, maritime resources, and citizens.
5. Enhance Timor-Leste's regional and global integration and elevate its diplomacy in support of sustainable national development.

Sub-sector	Key indicator	Baseline	Target 2030
Justice & Land Tenure	Judicial case backlog (pending cases) reduction	$\approx 4,000$	<1,600 (-60%)
	Land titles issued in priority economic corridors	≤ 949	30,000
Municipal Governance	Municipalities achieving $\geq 80\%$ of service targets	0%	100%
	Municipal budget absorbed by admin overhead	40–60%	$\leq 30\%$
Public Finances & Anti-Corruption	Non-oil domestic revenue (% of GDP)	12.2%	17.5%
	Institutions with anti-corruption focal point & control plan	$< 30\%$	$\geq 80\%$
Public Admin & Digital Government	Civil servants in the Unified Career Regime	0%	$\geq 80\%$
	Civil servants managed through SIGAP-FOUN	58%	100%
Security & Defense	IUU fishing losses in the EEZ (per year)	$\sim$ US\$40m	$\leq$US\$15m
	PNTL emergency response time	> 60 min	< 30 min
	Citizens feeling secure in their community	87%	$\geq 93\%$
International Relations	ASEAN commitments due implemented (AEC Roadmap)	Started 2026	100%
	Bilateral economic/investment agreements signed	None in force	≥ 3

SPATIAL INTEGRATION AND HOUSING: 2030 TARGETS

STRATEGIC FOCUS: From spatial concentration in Dili and a large housing quality deficit to a planned, resilient, and financeable housing and territorial system by 2030.

KEY 2030 OUTCOMES

1. Sustainable, inclusive, climate-resilient territorial development
2. Reduced spatial inequality – growth beyond Dili
3. Housing finance unlocked : 2 finance products; \$10 M bank/MFI lending; mortgage and Land title
4. Formal construction meeting Building Code for safer, climate-resilient construction : permits in all municipalities; ≥90% of public works compliant
5. Complete PMOTs and Special Plans : 12 municipalities + RAEOA,

STRATEGIC OBJECTIVES

1. Achieve balanced territorial development and reduce regional disparities
2. Improve access to adequate, affordable and climate-resilient housing

Sub-sector	Indicator	Baseline (2025)	2030 Target
Spatial Planning	Municipalities with approved & operational PMOTs	5	12+RAEOA
Spatial Planning	Major public investments compliant with PMOT zoning	Baseline from 2027	≥80%
Housing Market	Households supported through housing programs (cumul.)	Pilot scale	≥5,000
Housing Market	Program units with durable structure + land tenure	0%	≥80%
Housing Finance	Cumulative housing lending (banks & MFIs)	~0	US\$10 million
Housing Finance	Priority legal instruments enacted (of 3)	0	≥2 of 3
Building Standards	Municipalities with digital permit & inspection system	1 (Dili, partial)	12+RAEOA
Building Standards	Permit applications with on-site inspection & sign-off	0%	≥80%

GEDSI

KEY 2030 OUTCOMES

- Inclusive Development and Climate Resilient
- Reducing Inequality
- Environmental Sustainability

STRATEGIC OBJECTIVES

1. Mainstream GEDSI across public financial management, infrastructure, economic sectors and public services
2. Strengthen climate resilience through adaptation, ecosystem restoration, biodiversity conservation, pollution control and disaster risk reduction.

Key Results Areas (KRAs)

1. GEDSI Institutionalization and Sectoral Mainstreaming.
2. Climate Adaptation, Environmental Governance, Disaster Risk Reduction and Community Resilience
3. Biodiversity Conservation, Pollution Control and Sustainable Ecosystem Management.

CLIMATE ADAPTATION, ENVIRONMENTAL GOVERNANCE & BIODIVERSITY

KEY 2030 OUTCOMES

- Inclusive Development, Climate Resilient
- Reducing Inequality
- Environmental Sustainability

STRATEGIC OBJECTIVE

1. Strengthen climate resilience through adaptation, ecosystem restoration, biodiversity conservation, pollution control and disaster risk reduction.

Key Results Areas (KRAs)

1. Climate Adaptation, Environmental Governance, Disaster Risk Reduction and Community Resilience
2. Biodiversity Conservation, Pollution Control and Sustainable Ecosystem Management.

Ten National High-Level Strategic Priorities

GEDSI, Climate Resilience and environmental sustainability mainstream across all ten priorities.

1

Land Tenure Reform & Digital Cadastre

Target 2030: 30,000 titles

Lead: MOJ

2

MSME Credit Guarantee & Blended Finance

Target 2030: US\$40M unlocked

Lead: MOF

3

Blue Economy Development Platform

Target 2030: ≥1,200 tons aquaculture

Lead: MALFF

4

**Trade Facilitation & Logistics (ASYCUDA /
Tibar)**

Target 2030: 100% digital customs

Lead: MTC

5

Economic Corridors Development

Target 2030: 5 corridors upgraded

Lead: MPW

6

Tourism Enabling Platform

Target 2030: 200,000 arrivals

Lead: MTE

7

Irrigation & Agricultural Productivity

Target 2030: 70,000 ha irrigated

Lead: MALFF

8

Sector-Aligned TVET & Skills Development

Target 2030: 29,000 graduates

Lead: MHESC

9

Reliable Power & Water for Economic Zones

Target 2030: Renewables ≥50%

Lead: MPW

10

Investment Climate & Regulatory Reform

Target 2030: Registration ≤15 days

Lead: MCAE

KEY SUMMARY of 2030 OUTCOMES

From Where We Are, to Where We Commit To Be by 2030

6.0–7.5% Annual non-oil GDP growth <i>from 4.1% (2024)</i>	5,000 – 7,000 New formal private jobs/year <i>from ~3,115</i>	30,000 Land titles issued in economic corridors <i>from ≤949</i>	17.5% Non-oil domestic revenue / GDP <i>from <12.2%</i>
≥85% National roads in good/fair condition <i>from 48%</i>	100% Sucos with 24/7 electricity <i>from ~70%</i>	≥50% Renewables in electricity mix <i>from <5 %</i>	≥60% TVET graduates in formal employment <i>Baseline:29,000 sector-ready graduates</i>
≤35% Stunting in children under 5 <i>from 45%</i>	0.55 Human Capital Index <i>from 0.45</i>	≤US\$15M Annual IUU fishing losses in EEZ <i>from ~US\$40M</i>	100% ASEAN commitments due delivered <i>incl. 2029 Chairmanship</i>

These targets are the Government’s approved commitments: tracked in the MTP Results Framework

MTP 2027–2030 Results Framework

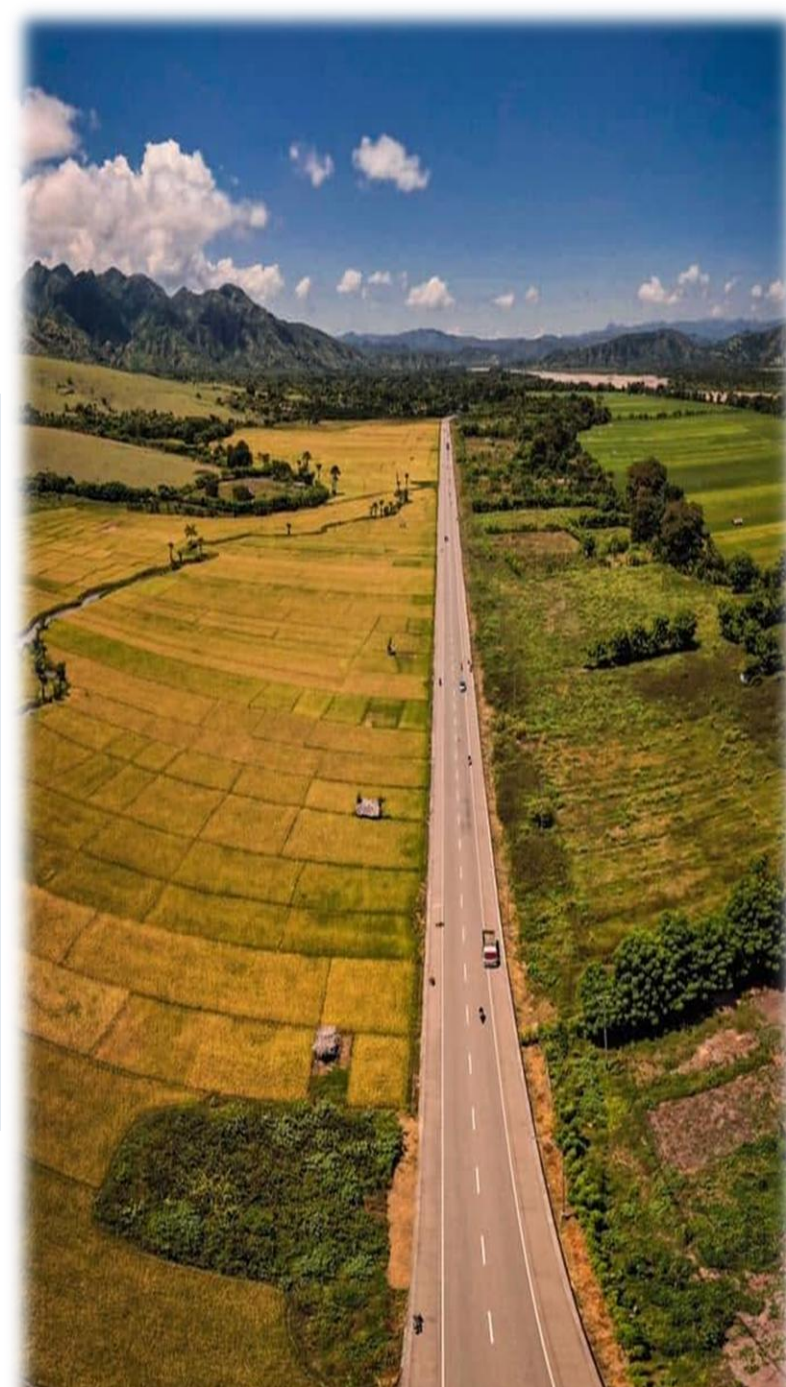
19 Strategic Objectives

35 Key Result Areas

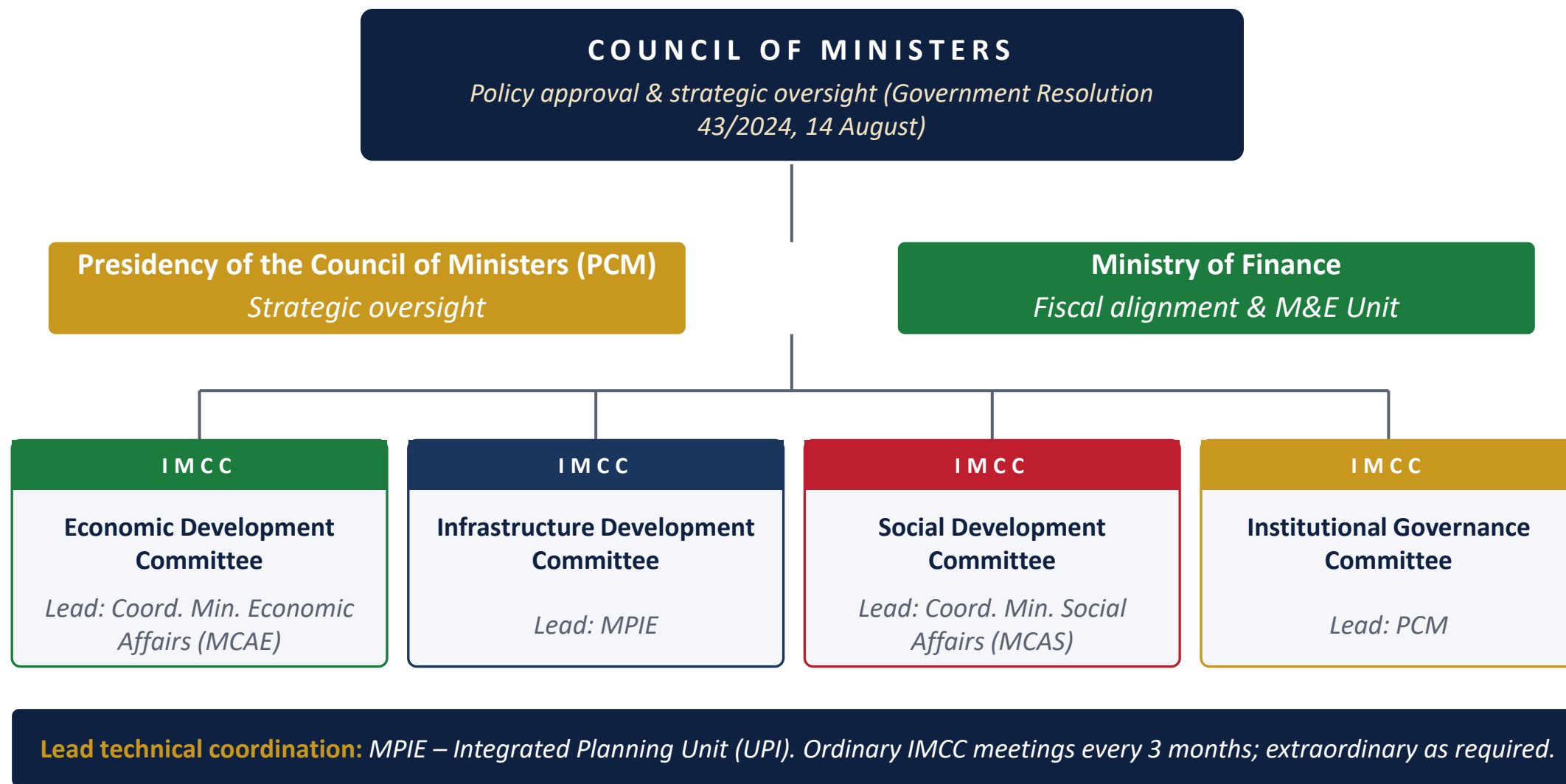
168 Strategic Outcomes

71 KPI Targets & Indicators

Pillar / Framework Area	SO	KRA	Outcomes	KPIs
Pillar 1: Economic Diversification	3	6	31	11
Pillar 2: Infrastructure Development	3	6	40	12
Strategic Area: Spatial Planning & Housing	2	4	19	10
Pillar 3: Social & Human Capital Development	4	10	25	17
Pillar 4: Institutional Development	5	6	46	9
Chapter 8: GEDSI & Climate Mainstreaming	2	3	17	12
Total	19	35	168	71



MTP Governance and Delivery





OBRIGADA

“Strengthening Integrated Strategic Planning for Sustainable and Inclusive Development”

