

Appendix A

The Enterprise Survey

Using a postal questionnaire administered with the help of EPZDA and face-face interviews, the team was able to collect detailed quantitative and qualitative information from 34 enterprises in Mauritius. The information covered firms' perceptions of export prospects and constraints; government policies and institutions; technological capabilities; linkages between firms and technology institutions; labour productivity, skills and training; and finance. The survey, which included firms from food products, textiles and garments, chemicals, and electronics, attempted to cover firms from all size, ownership and export categories. The firms surveyed were located in industrial areas all over the island. Table A1 shows the main features of the sample firms.

Table A1: Characteristics of the Mauritius Enterprise Sample

Industry	Number of firms
Food Products	5
Textiles and garments	22
Chemicals	3
Electronics	4
Size (by employment)	% Distribution
Giant (above 501)	9
Large (251-500)	41
Medium (51-250)	38
Small (<50)	12
Ownership	% Distribution
100% foreign owned	18
Foreign-local joint ventures	32
100% local private	50
Export-orientation	Exports as % of sales
Food Products	54
Textiles and garments	80
Chemicals	14
Electronics	75

Industry: Textiles and garments, which have driven the country's entry into manufactured exports since the 1970s, are still the leading manufactured export. Included here are a combination of garment factories and integrated textile-garment production units. Food products (including fish and preparations) have performed quite well and are a significant export item today. Electronics (including components, instruments and watches and clocks) have remained a relatively minor export to date but offer considerable scope for future export growth. Chemicals (including fertilisers) have also remained a relatively small export and offer some scope for future export growth. The four industries exhibit different degrees of technological complexity. Electronics and chemicals generally require a higher levels of skills and technology than the other two. Textiles and garments typically require the lowest.

Ownership: Half the firms have some proportion of foreign ownership (i.e., 17 out of 34). There are 6 wholly foreign-owned firms, 11 joint ventures (with foreign and local equity) and 17 wholly privately-owned local firms. The foreign firms include some of the largest MNC affiliates in Mauritius in textiles and garments, electronics and food products while the local firms include the largest firms in textiles and chemicals as well as small and medium enterprises in the four industries.

Firm size: Measured by employment, the sample contains 3 giant enterprises (>1000 employees), 14 large enterprises (251-1000 employees), 13 medium enterprises (51-250 employees) and 4 small enterprises (<50 employees). The giant and large firms include both foreign and local firms.

Age in production: Nine of the sample firms are over ten years old and the rest less than 10 years old. The average age of the sample firms is 12.8 years.

Exports: The sample firms' exports in 1995 totalled just over US\$ 350 million. The average value of exports was US\$ 10.8 million; however, the average conceals large differences and without the three largest exporters it falls to US\$ 6.6 million. Thirteen of the firms are 100 per cent export-oriented, six export more than 50 per

cent of their sales and the rest less than 50 per cent. Of the four industries, the textiles and garments and electronics firms are the most export-oriented while chemicals are the least. Food products come in between these extremes. Several of the sample firms are among the top 25 exporters in Mauritius. The US and the EU are the main markets, largely reflecting preferential market access under the Lome Agreement, but there is a growing share of exports going towards the regional African market.

Appendix B

Technological Classification of Manufactured Exports

SITC number and product

<i>Resource intensive</i>	<i>Labour intensive</i>	<i>Scale intensive</i>	<i>Differentiated</i>	<i>Science based</i>
014 meat prepd, prsvd, nes etc.	651 textile yarn	621 materials of rubber	711 steam boilers & aux. plant	893 articles of plastic nes
037 fish etc. prepd, prsvd nes	652 cotton fabrics, woven	625 rubber tyres, tubes etc.	712 steam engines, turbines	541 medicinal, pharm products
054 veg etc. frsh, simply prsvd	653 woven man-made fib fabric	628 rubber articles nes	713 internal combus piston engine	751 office machines
056 vegetables etc. prsvd, prepd	654 other woven textile fabric	662 clay, refractory bldg prd	714 engines and motors nes	752 automatic data proc equip
058 fruit preserved, prepared	655 knitted, etc fabrics	666 pottery	716 rotating electric plant	759 office, adp mach pts, acces
098 edible products, preps nes	656 lace, ribbons, tulle, etc	522 inorg elemnts, oxides, etc	718 oth power generatg mach	764 telecom eqpt, pts, acc nes
122 tobacco, manufactured	657 special txtl fabrc, prods	523 othr inorg chemicals etc.	721 agric machy, exc tractors	776 transistors, valves, etc.
334 petroleum products, refin	658 textile articles nes	524 radioactive etc. material	722 tractors non-road	792 aircraft etc.
335 residual petrilm prod nes	659 floor coverings, etc	531 synt dye, nat indgo, lakes	723 civil engineerg equip etc.	871 optical instruments
611 leather	691 structures and parts nes	532 dyes nes, tanning prod	724 textile, eather machnry	872 medical instruments nes
612 leather etc. manufactures	692 metal tanks, boxes, etc	533 pigments, paints, etc	725 paper etc. mill machinery	873 meters and counters nes
613 fur skins tanned, dressed	693 wire products non electr	551 essentl oils, perfume etc	726 printg, bkbndg machy, pts	874 measuring, control instruments
633 cork manufactures	694 stl, coppn nails, nuts, etc	553 perfumery, cosmetics, etc	727 food machry non-domestic	
634 veneers, plywood, etc	695 tools	554 soap, cleansing etc. preps	728 oth mach for splc indus	
635 wood manufactures nes	696 cutlery	562 fertilizers, manufactured	736 metalworking mach-tools	
641 paper and paperboard	699 base metal mfrs. nes	572 explosives, pyrotech prod	737 metalworking machnry nes	
642 paper, etc, precut, arts of	821 furniture, parts thereof	585 plastic material nes	741 heating, cooling equipmnt	
661 lime, cement, bldg prods	831 travel goods, handbags	591 pesticides, disinfectants	742 pumps for liquids etc.	
667 pearl, prec-,semi-p stone	842 men's outerwear not knit	592 starch, inulin, gluten, etc	743 pumps nes, centrifuges etc.	
511 hydrocarbons nes, derivs	843 women's outerwear non-knit	598 miscel chem. products nes	744 mechanical handling equ	
512 alcohols, phenols etc.	844 under garments not knit	663 mineral manufactures nes	745 nonelec machy,tools nes	
513 carboxylic acids etc.	845 outerwear knit non-elastic	664 glass	749 nonelec mach pts, acc nes	
514 nitrogen-fnctn compounds	846 under garments	665 glassware	761 television receivers	
		671 pig iron etc.		

SITC number and product (cont.)

<i>Resource intensive</i>	<i>Labour intensive</i>	<i>Scale intensive</i>	<i>Differentiated</i>
515 org-inorg compounds etc.	847 textile clothing acces nes	672 iron, steel primary forms	762 radio broadcast receivrs
516 other organic chemicals	848 headgear, nontxtl clothing	673 iron, steel shapes etc.	763 sound recordrs
582 prod of condensation etc.	851 footwear	674 irn, stl univ, plate, sheet	771 electric power mach nes
583 polymerization etc. prods	892 printed matter	675 iron, steel hoop, strip	772 switchgear etc, parts nes
584 cellulose derivatives etc.	676 railway rails etc. irn, stl	774 electro-medcl, xray equip	773 electr distributng equip
Science based	894 toys, sporting goods, etc	677 irn, stl wire(excl w rod)	775 household type equip nes
893 articles of plastic nes	895 office supplies nes	678 iron, stl tubes, pipes, etc	778 electrical machinery nes
541 medicinal, pharm products	896 works of art etc.	679 irn, stl castings unworkd	812 plumbg, heatng, lghtng equ
751 office machines	897 gold, silver ware, jewelry	781 pass motor veh exc buses	881 photo aparat, equipt nes
752 automatic data proc equip	898 musical instruments, pts	782 lorries, spl mtr veh nes	882 photo, cinema supplies
759 office, adp mach pts, acces	899 other manufactured goods	783 road motor vehicles nes	883 developed cinema film
764 telecom eqpt, pts, acc nes		784 motor veh prts, acces nes	884 optical goods nes
776 transistors, valves, etc.		785 cycles, etc motrzd or not	885 watches and clocks
792 aircraft etc.		786 trailers, nonmotr veh, nes	
871 optical instruments		791 railway vehicles	
872 medical instruments nes		793 ships and boats etc.	
873 meters and counters nes			
874 measuring, control instruments			

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