

Outermost Region Fiche

MARTINIQUE

Study on the impact of
the COVID-19 pandemic
on the Outermost Regions

Region	Martinique
Country	France
Size (2016)	1 108 Km ²
Number of inhabitants (2020)	359 821
Population density (2019)	328.6 per Km ²



EUROPEAN COMMISSION

Directorate-General for Regional and Urban Policy
Directorate A — Budget, Communication and General Affairs
Unit A1 - Outermost Regions

Contact: Directorate General for Regional and Urban Policy, unit A1 - Outermost Regions

E-mail: REGIO-A1-RUP@ec.europa.eu

*European Commission
B-1049 Brussels*

Study on the impact of the COVID-19 pandemic on the outermost regions (OR)

Outermost Region Fiche Martinique

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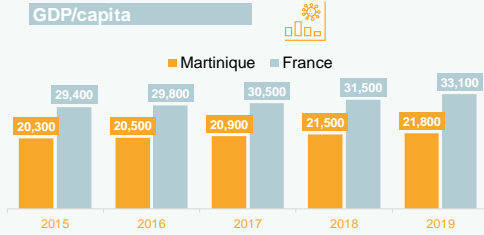
INTRODUCTION

This fiche was prepared as part of a broader study assessing the impact of COVID-19 on the nine EU outermost regions (ORs). It provides an in-depth analysis of the economic and social impacts of COVID-19 in Martinique, highlights the measures taken to mitigate the spread of the virus, and puts forward proposals for recovery and resilience-building measures addressing the major issues identified in this outermost region.

This fiche first presents an overview of the health-related impacts of the pandemic in Martinique, as well as a timeline of measures put in place to keep infection rates in check. It then examines the economic repercussions, starting at the macroeconomic level, followed by an analysis of the main sectoral impacts. The third section presents the social impacts and is followed by an identification of the most relevant policy measures implemented in the region to mitigate the negative consequences of the crisis. The last two sections look at the future prospects and suggest measures to support the recovery, and to build resilience to similar challenges in the future.

Overview and impact of COVID-19 on the economy of Martinique

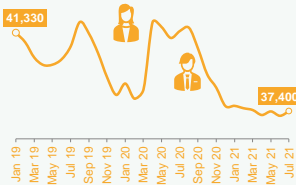
GDP/capita



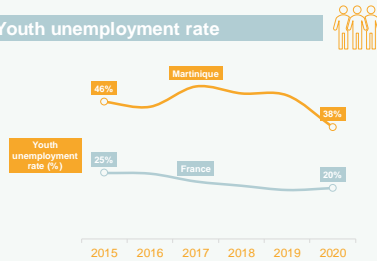
3%

estimated drop in GDP in 2020

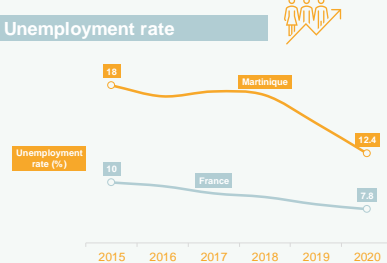
Number of jobseekers



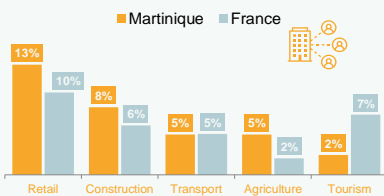
Youth unemployment rate



Unemployment rate



Share of key sectors within the economy as % of GDP - 2020



Household with broadband access - 2019

76%

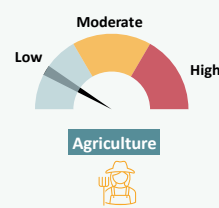
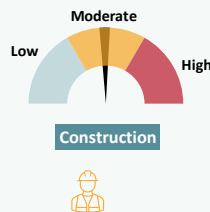
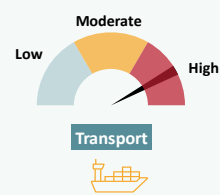
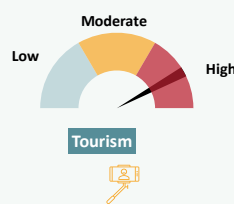
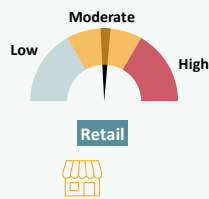
compared to the French average of 83%

Young people neither in employment nor in education and training - 2020

18.5%

compared to the French average of 11.4%

Impact of the COVID-19 crisis on specific sectors of the economy



Recommendations



Bringing tourists back to the region and diversify the market

Facilitating access to credit for entrepreneurs



Modernising and diversifying the fishing sector

Developing skills needed to meet the region's present and future needs



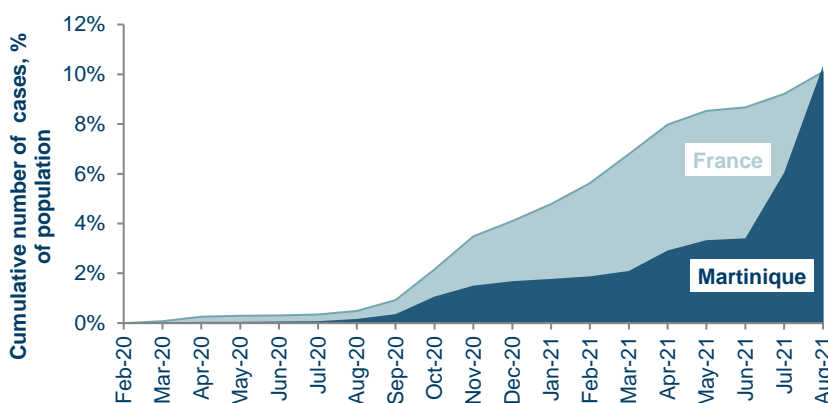
Supporting the digital modernisation of households

1. COVID-19 PANDEMIC IN THE REGION – HEALTHCARE STATISTICS AND TIMELINE

In terms of COVID-19 case numbers, Martinique was proportionally less affected by the COVID-19 pandemic than mainland France for the first 18 months of the pandemic; between February 2020 and June 2021. However, a fourth wave of COVID-19 cases emerged in Martinique in summer 2021, and the number of recorded cases spiked in the number of infections between July and August. This led to the introduction of control restrictions on the population.

Initially, Martinique's insularity acted in its favour in terms of impeding the transmission of the virus, resulting in a mild first wave compared to mainland France. The first sharp rise in cases occurred only after summer 2020, when Martinique was hit by a second wave of infections. The situation worsened at the end of Q2 2021, when the number of detected cases increased further due to the spread of the Delta variant on the island. At the end of August 2021, the number of cumulative COVID-19 cases detected (as % of the total population) was 10.3%, higher than mainland France (10.1%) (Figure 1).

Figure 1: Cumulative number of COVID-19 cases, in percentages (Feb 2020 – August 2021)



Source: Ecorys based on WHO data

As of August 2021, Martinique had registered 37,192 infections and 47 COVID-related deaths.¹ The regional government was quick to impose restrictions after the first confirmed COVID-19 cases were detected in early March 2020. The first lockdown followed the measures in mainland France, with schools and non-essential shops closing, limited access to beaches, a curfew, and quarantine requirements for incoming passengers.

The first relaxation of restriction measures occurred in mid-May 2020, with new precautionary measures being re-introduced in August when cases of new infections began to rise (Figure 2). While Martinique successfully mitigated the first wave of infections, the second wave saw cases rising sharply, leading to the introduction of more stringent restrictions and a second lockdown in October. This made Martinique the only French outermost region to face a second lockdown which introduced the same level of restrictive measures as mainland France.² By the end of 2020, the falling number of new cases allowed the Regional Health Agency (ARS) to ease restrictions, followed by hopes that the launch of the vaccination campaign in January 2021 would allow for the complete lifting of measures. While the vaccination campaign is ongoing, new restrictions were nevertheless imposed on travel between mainland France and Martinique as well as between Guadeloupe and Martinique. These were only lifted in June 2021 following the reopening of restaurants, museums and other public facilities.

Due to the drastic increase in the number of infections, new restrictions were introduced again between the end of July and August 2021. These mainly consist of the closure of beaches and shops selling non-essential items. Tourists were also discouraged from visiting Martinique, and those who were already on the island were advised to leave.

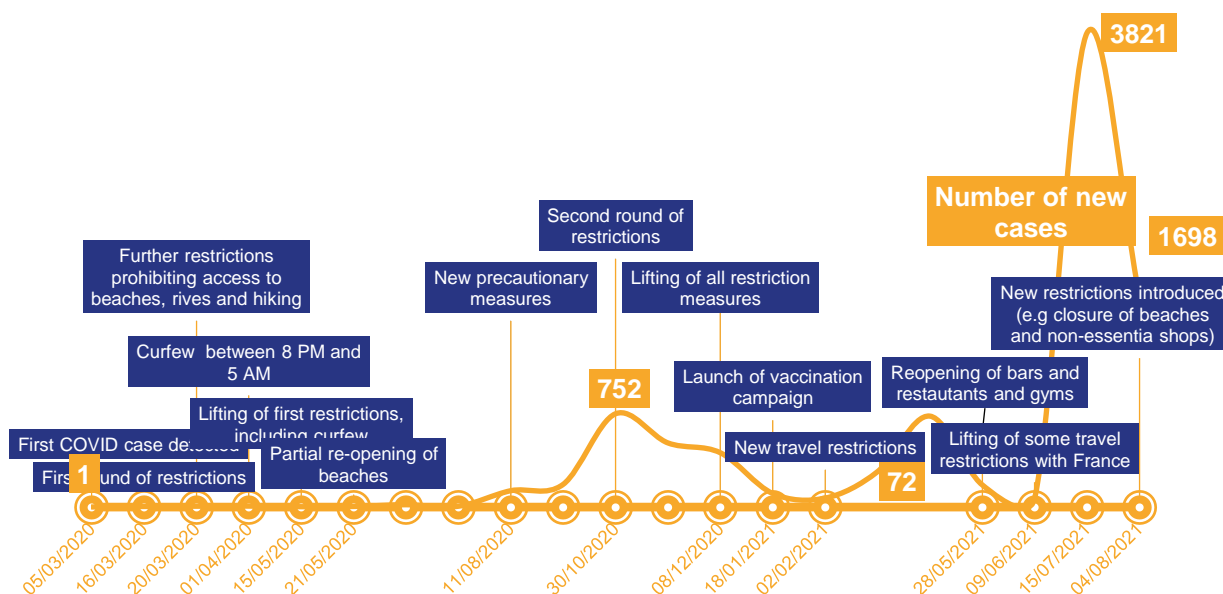
The main reason for the rapid increase in cases is the limited progress made by the vaccination campaign on the island. On 31 August 2021, the vaccination rate was much lower than that in mainland France; in Martinique, 27.9%

¹ WHO Coronavirus (COVID-19) Dashboard, <https://covid19.who.int/>

² France info (2020) *La Martinique seul territoire d'Outre-mer re-confiné*. Available at: <https://la1ere.francetvinfo.fr/martinique/la-martinique-seul-territoire-d-outre-mer-re-confine-887606.html>

of residents had had at least one dose (compared to 72.3% in mainland France), and 20.3% of inhabitants were fully vaccinated (compared to 59.9% in mainland France).³

Figure 2: Timeline of the health / social distancing measure and healthcare milestones and new COVID-19 cases reported in Martinique



Source: Ecorys. Figures based on WHO data

The COVID-19 pandemic is not the first crisis to hit Martinique in recent years. Besides a dengue outbreak in 2019, Martinique has faced public health and climate-related challenges following a drought and severe rain. The dengue epidemic has been ongoing since November 2019, with the French authorities declaring an epidemic in September 2020.⁴ Martinique faces other challenges such as sargassum seaweed growth (toxic algae), cyclones, water, and water treatment management.⁵ All these have helped to reinforce Martinique's capacity for crisis management, and its ability to manage other challenges in parallel to the COVID-19 pandemic.

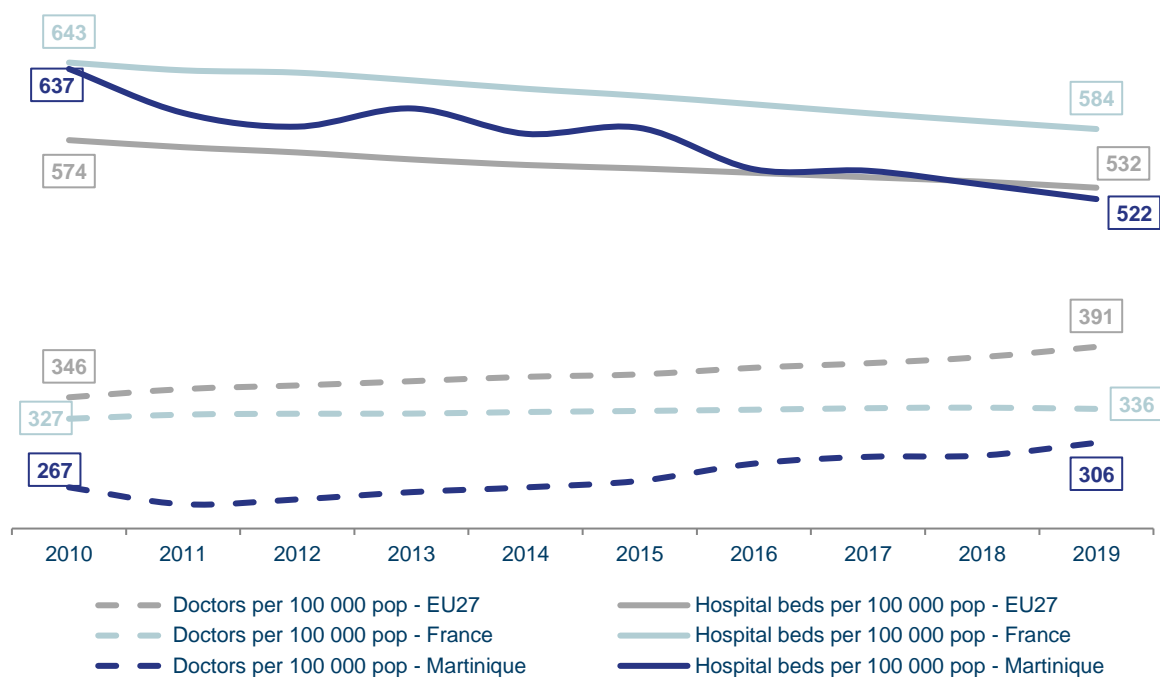
The situation with regard to medical infrastructure on the island has progressed little over the last decade. While the number of doctors per 100,000 inhabitants has increased since 2012, it remains well below that of mainland France and the average number of doctors for the EU27. The number of hospital beds per 100,000 inhabitants in Martinique has decreased since 2010, but was higher than that of the EU27 until 2016. In 2019, the number of hospital beds registered was 522, below the EU27 level (532) and mainland France (584).

³ Our World in Data. Available at: <https://ourworldindata.org/covid-vaccinations?country=FRA>

⁴ European Centre for Disease Prevention and Control (2020) *Dengue epidemic in Martinique, France*. <https://www.ecdc.europa.eu/en/news-events/dengue-epidemic-martinique-france>

⁵ Interview with the Collectivité Territoriale de Martinique

Figure 3: Number of hospital beds and medical doctors (per hundred thousand inhabitants)



Note: The number of hospital beds is not available for Martinique for 2017 and 2018
 Source: Ecorys based on Eurostat data

2. ECONOMIC IMPACT OF THE COVID-19 PANDEMIC

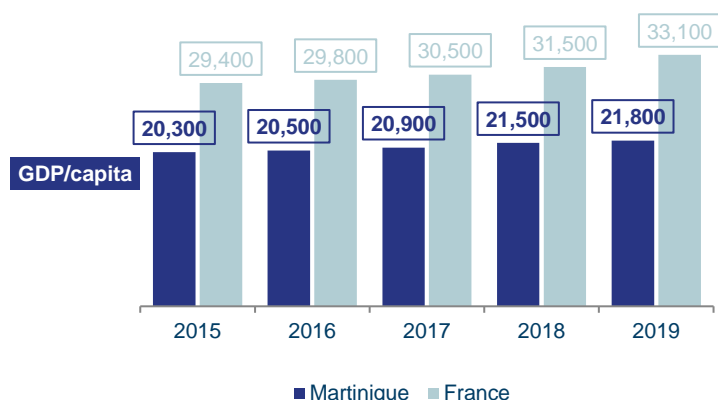
MACROECONOMIC OVERVIEW

Although Martinique's healthcare indicators in Q2 2020 reveal a moderate percentage of cases compared to mainland France, the impact of the first lockdown (March-May) was devastating for the island's economic activity, which decreased by an estimated 20% when compared to the business-as-usual scenario.⁶ Martinique's GDP estimates prepared by CEROM (*Comptes Economiques Rapides pour l'Outre-mer*) show a 3% decrease in GDP for 2020.⁷

Figure 4 presents Martinique's GDP growth, which has been stagnating, improving only slightly in 2018. With a high of €24,000 per capita in 2019, it amounted to 68% of mainland France's GDP per capita.

⁶ Comptes Economiques Rapides pour l'Outre-mer (CEROM) (2020) Martinique - *Un recul de l'activité économique de 20 % pendant le confinement*. Available at: https://www.cerom-outremer.fr/IMG/pdf/ma_inc_30-impact_crise_2020_valide.pdf
⁷ Data on estimates based on January – June 2020 period, provided by CEROM.

Figure 4: GDP per capita, in € (2015-2019)

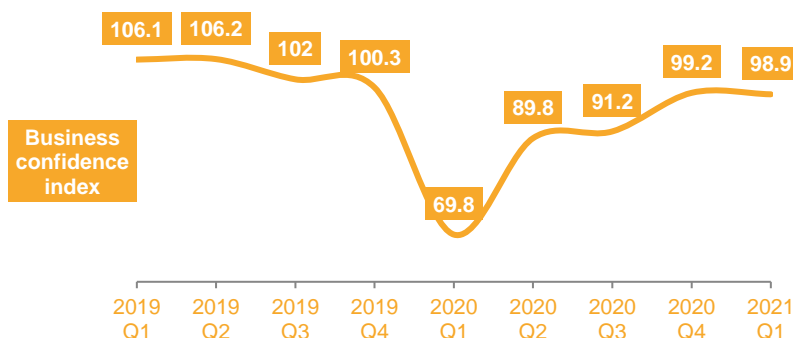


Source: Ecorys based on Eurostat data

The first lockdown (March-May 2020) had a substantial impact on the economy, restricting economic activity for up to a third of the population, who were faced with difficulties transitioning to working from home due to the limited broadband network on the island and limited access to computers⁸ (76% of households have broadband access). The second wave of the pandemic, despite being more severe in terms of infections, had a lesser impact on economic productivity, with the exception of the tourism sector, which

registered a setback of 75-80%. Several structural constraints aggravated the negative impacts of the pandemic: remoteness, difficulty in reaching raw materials, vulnerable supply chains (consumption and industry), and reliance on a limited number of export partners and markets (mainly Guadeloupe, French Guiana, and mainland France). Q1 2021 saw a resumption in economic activity, assisted by the support measures put in place to buffer the impacts.⁹ The effects of these efforts should be visible with a delay, due to the time lag typically associated with economic indicators.

Figure 5: Business confidence index, Martinique (Q1 2019 – Q1 2021)



Source: Ecorys based on CEROM data

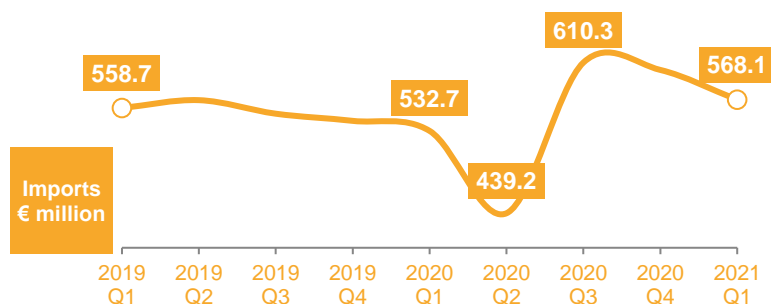
The reduction in economic activity is reflected in the business confidence indicator, which decreased by 30% during Q1 2020, coming close to its 2009 level.¹⁰ While the index recovered in Q2 2020, it has not yet regained its pre-pandemic level, averaging 102 points in 2019. Martinique's economy remains vulnerable, in part because of its economic reliance on micro and small

enterprises. Many self-employed people working in sectors classified as non-essential during the lockdowns (tourism, culture, music, leisure, etc.) and thus had to discontinue their activities.¹¹ Based on CEROM (*Comptes économiques rapides pour l'Outre-mer*) data, individual businesses make up less than 60% of enterprises in Martinique.¹² The number of registered micro-enterprises continually increased until the crisis started (for example, by 44.8% from 2018 to 2019).¹³ Additionally, suppressed household consumption was one of the main factors driving down economic activity, decreasing by 27% during the first lockdown.¹⁴

Martinique has a number of socio-economic characteristics which, combined with the impact of COVID-19, make it even more challenging to sustain pre-pandemic economic performance. It has an ageing population (with residents aged 60 or over-representing more than 25% of the population, and expected to reach 40% by 2030¹⁵), and increasing inequalities.¹⁶ Martinique's municipalities are financially vulnerable due to lower tax revenues on fuels and customs (the *Octroi de mer*), which are estimated to have decreased by 9%, amounting to a loss of around €20 million in 2020.¹⁷ This reduction in tax revenues is related to lower import levels between Q1 and Q3 2020 (see Figure 6). Regional public finances rely heavily on the *Octroi de Mer*, as the local authority (*Collectivité Territoriale de Martinique - CTM*) and community budgets are financed by it.¹⁸ Further cuts to public finances have been caused by decreasing net revenues from fuel tax, due to decreased mobility of vehicles on the island.¹⁹

While no data are available on the number of new and dissolved enterprises per sector, the first semester of 2021 recorded fewer enterprise failures than the same period in 2020, thanks to stronger governmental support measures (according to CCI). Enterprises in Martinique received critical financial support from the French state, notably through the state-guaranteed loan scheme, as well as EU-funded support (see section 4 in this fiche). This is important, given that Martinique's economy is constituted principally of micro-enterprises with insufficient equity to weather market contraction. Enterprises have faced difficulties due to restrictions on movement. No increase in consumer credit card payments was recorded.

Figure 6: Imports, € million (2019 Q1 – Q1 2021)

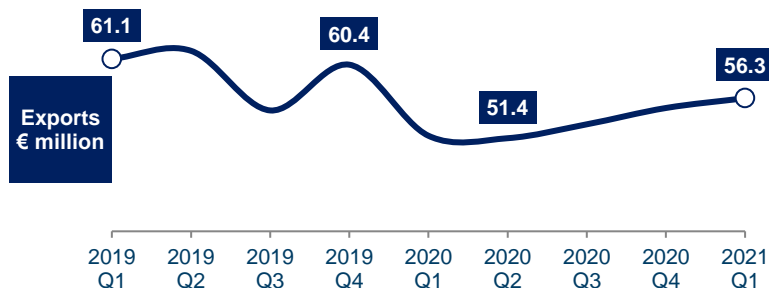


Source: Ecorys based on CEROM data

Martinique's imports recovered swiftly in the second half of 2020 (Figure 6). Imports decreased by 22% in Q2 2020 as a consequence of lower economic activity following the second lockdown but recovered by Q3 2020, reaching higher levels than before the start of the COVID-19 pandemic. The reduction in imports can mainly be attributed to lower household consumption and the slowdown in internal consumer and business demand. Although imports of

food products increased by 35% during the first lockdown, total imports fell during this period, due mainly to lower demand for fuel (-72%).

Figure 7: Exports, € million (2019 Q1 – Q1 2021)



Source: Ecorys based on CEROM data

Martinique's exports exhibited some volatility before the start of the pandemic, which was most likely the consequence of the climate and health crisis that affected the island through 2019 (dengue and drought). Export levels have generally declined since Q4 2019. The total value of exports decreased by 16% (though

with some fluctuation over time) from the pre-pandemic level of €61.1 million in Q1 2019, to €51.4 million in Q2 2020, which reflects negatively on the island's trade balance. This drop relates mostly to exports of agricultural products,

⁸ Information from interview with the CCI Martinique.

⁹ Interview with the Collectivité Territoriale de Martinique

¹⁰ Comptes Economiques Rapides pour l'Outre-mer (CEROM), 2020. Martinique - *Un recul de l'activité économique de 20 % pendant le confinement*. Available at: https://www.cerom-outremer.fr/IMG/pdf/ma_inc_30-impact_crise_2020_valide.pdf

¹¹ Inputs from interview with OPCS and Martinique Développement.

¹² Comptes Economiques Rapides pour l'Outre-mer (CEROM), 2005. *Les entreprises de Martinique*. Available at: https://www.cerom-outremer.fr/IMG/pdf/cerom_entrepr_complet.pdf

¹³ INSEE, 2020. *Bilan économique 2019 – Martinique*. Available at:

<https://www.insee.fr/fr/statistiques/4475834?sommaire=4476002>

¹⁴ Comptes Economiques Rapides pour l'Outre-mer (CEROM), 2020. Martinique - *Un recul de l'activité économique de 20 % pendant le confinement*. Available at: https://www.cerom-outremer.fr/IMG/pdf/ma_inc_30-impact_crise_2020_valide.pdf

¹⁵ INSEE, 2020, La Martinique face au vieillissement de la population : hausse importante du nombre de seniors dépendants à l'horizon 2030. Available at: <https://www.insee.fr/fr/statistiques/4796029>

¹⁶ Interview with the CCI Martinique.

¹⁷ Interview with the Collectivité Territoriale de Martinique.

¹⁸ Interview with the Collectivité Territoriale de Martinique.

¹⁹ *Ibid.*

specific food crops, and melon. Export activity has suffered from obstacles faced by local supply chains following the reduction in air and maritime connections.

SECTORAL ANALYSIS

The economy of Martinique is mostly based on the tertiary (services) sector, which represents more than 82% of added value and 85% of employment.²¹ Accounting for 10-12% of GDP, tourism is one of the main drivers of Martinique's economy and affects many other sectors: agriculture, fisheries, local industry, culture, and events.²² As an economy located further away from supply centres, Martinique remains dependent on European exports both for industry and for household consumption. Thus, following the onset of the pandemic, Martinique struggled to maintain positive economic growth. Whilst 2020 began on a positive trajectory, the onset of COVID-19 in mid-March and the subsequent lockdown meant that the performance of most sectors of the economy was impacted negatively, resulting in a 29% loss in production.²³ The second wave of the pandemic had less severe impacts in terms of activity loss during October, except for the tourism sector, which registered a setback of 75-80%.²⁴

Martinique's economy is largely based on non-commercial services, including public administration, education, and healthcare. Excluding these, the sectors accounting for the largest share of Martinique's production include retail (wholesale and retail trade), construction, and real estate activities, collectively accounting for almost 30% of total production.

A CEROM study estimated the impact of COVID-19 in the French ORs. Martinique experienced a loss of 20% in economic activity during the first lockdown (March-May 2020), which was estimated to contribute to a 3% loss in annual GDP.²⁵ Table 2 provides an overview of economic losses in terms of production and value-added in key economic sectors. Service sectors experienced the sharpest reduction in activity, with accommodation and food in the lead (87%). The hardest-hit sectors in terms of absolute production loss were construction (€137.9 million) and wholesale and retail trade (€119.8 million). Both of these sectors had the highest losses in added value, with €80.4 million and €54.2 million respectively. Public administration services remained intact following the first lockdown, while the agriculture sector only accounted for small losses in both production and added value, making it the sector least affected by the pandemic.

Table 1: Economic structure of Martinique (2020)

Sector	Share of total production (%)
Agriculture and agri-food	4.9
Energy and waste management	7.0
Manufacturing	4.8
Construction	8.2
Wholesale and retail trade ²⁰	13.4
Transport	4.9
Accommodation and food	2.4
Information and communication	5.1
Financial and insurance activities	3.8
Real estate activities	8.3
Other services	2.8
Public administration and other activities	24.4
Services to enterprises	9.8
Total	100

Source: Ecorys based on DEM data

²⁰ Including repair of motor vehicles and motorcycles

²¹ IEDOM (2020), Rapport d'activité 2019 de la Martinique. Available at: https://www.iedom.fr/IMG/pdf/ra_martinique_vf.pdf

²² *Ibid.*

²³ Interview with the Collectivité Territoriale de Martinique

²⁴ Interview with CCI Martinique

²⁵ CEROM (2021). Les conséquences économiques de la crise sanitaire dans les Outre-mer. Published: March 2021. Available at: https://www.cerom-outremer.fr/IMG/pdf/cerom_impact_crise_sanitaire_vf.pdf

Table 2: Estimated economic loss for key economic sectors in Martinique, March-May 2020

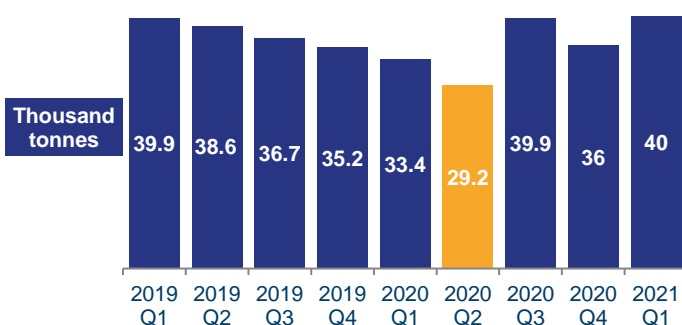
Sector	Production		Value-added
	Decrease in activity during lockdown (%)	Loss in € million	Loss in added value (€ million)
Agriculture	-6	-3	-3.5
Energy and waste management	-27	-38.5	-10.9
Agri-food	-22	-12.3	-4.5
Manufacturing	-49	-48	-15.4
Construction	-81	-137.9	-54.2
Wholesale and retail trade ²⁶	-43	-119.8	-80.4
Transport	-32	-31.9	-14.9
Accommodation and food	-87	-43.5	-18.5
Information and communication	-23	-24.6	-15.1
Financial and insurance activities	-18	-14.1	-13
Real estate activities	-23	-40.3	-42.8
Other services	-37	-21.7	-14
Public administration and other activities	0	0	0
Services to enterprises	-34	-69.8	-45.5
Total	-29	-605	-333

Source: Ecorys based on CEROM data

Construction

With a contribution of over 8% in total production, the construction sector is one of the pillars of Martinique's economy. As the pandemic worsened in Q2 2020, construction activities slowed down significantly. This was reflected in a decrease in turnover of 80-90%, according to an ACCIOM (Association des Chambres de Commerce et d'Industrie des Outre-Mer) report.²⁷ Following the relaxation of restrictive measures, construction activities restarted with delays due to contracting bottlenecks. Once construction activities resumed, the sector could not easily regain pre-pandemic performance levels, because fewer workers were allowed on construction sites due to the protective measures.²⁸ The CTM (Collectivité Territoriale de Martinique) attempted to support and promote the continuation of construction sector activities, but faced difficulties due to COVID-19 measures, in addition to complications

Figure 8: Cement sales, Martinique, (Q12019 – Q12021)



Source: Ecorys based on CEROM data

related to remote working.²⁹ Thus, while investment in construction activities has not ceased, it has faced stagnation.³⁰ Lower demand for construction is reflected in falling cement sales (Figure 8). While these have exhibited a negative trend since the beginning of 2019 and hit a low during the first lockdown, sales recovered sharply in Q3 2020 and Q1 2021.

²⁶ Including repair of motor vehicles and motorcycles

²⁷ Association des CCI d'outre-mer (ACCIOM), 2020. *Outre-mer: L'état d'urgence*. Available at: <https://www.guyane.cci.fr/wp-content/uploads/2021/02/OUTRE-MER-L%C3%89TAT-DURGENCE.pdf>

²⁸ Interview with Collectivité Territoriale de Martinique (CTM)

²⁹ Interview with Collectivité Territoriale de Martinique (CTM)

³⁰ Interview with CCI Martinique

Tourism

The sectors most severely affected were those designated as 'non-essential' during the lockdown; most notably the tourism sector and all accompanying services (culture, leisure, etc.). As noted, tourism typically contributes 10-12% of GDP – equivalent to €580 million annually.³¹ This is a higher share than the equivalent sectoral contribution in mainland France (8% of GDP)³², and it is not surprising that tourism also drives economic performance in other sectors such as agriculture, fisheries, local industry, culture, and events. The impact of COVID-19 was most obvious in the fall of tourism activity, including a sharp reduction in commercial flights and cruise ships. As a consequence of the deserted beaches, the marine fauna flourished, enabling sharks to expand along the island's coast. This, in turn, heightened perceived danger, and suppressed interest by potential tourists.

While Martinique enjoyed stable trends in tourism activities in 2019 and the beginning of 2020 (Figure 9), the start of the pandemic reversed such positive trends. Visitors had to comply with specific requirements (quarantine for seven days, PCR tests) and needed imperative reasons to enter Martinique.³³ Tourism suffered a setback of 80% during the first lockdown, then 75-80% during the second wave.³⁴

According to the government's observatory, the loss for the hotel industry between 2019 and 2020 amounted to €41 million (-69%), and is expected to be €15 million in 2021 compared to 2020 (-62%).³⁵ For local travel agencies, losses are close to 90% to 95%, with accompanying services such as car rentals recording -56% in losses between 2020 and 2021 and -66% between 2019 and 2020.³⁶

Sectors classified as non-essential (tourism, culture, leisure) suffered the heaviest losses, as they are more commonly represented by self-employed people. As noted, the self-employed were amongst the hardest hit by the pandemic, as most did not have an active source of income, while being obliged to continue paying taxes.³⁷ Many were active in the accommodation and food sector. Most hotels remained closed during the first lockdown, with only one in eight hotels open in Martinique; a lower rate than in mainland France, where one in four hotels remained open. In June, 70% of hotels were open, which is slightly lower than in mainland France (78% of hotels open) but higher than in Guadeloupe (54%).³⁸

³¹ *Ibid.*

³² République française, 2019. *Les bons chiffres de la saison touristique estivale 2019*. Available at: vie-publique.fr/en-bref/272167-les-bons-chiffres-de-la-saison-touristique-estivale-2019#:~:text=Cette%20activité%20économique%20représente%20,des%20mois%20d'été%202019%20

³³ Interview with Collectivité Territoriale de Martinique (CTM)

³⁴ Interview with Collectivité Territoriale de Martinique (CTM)

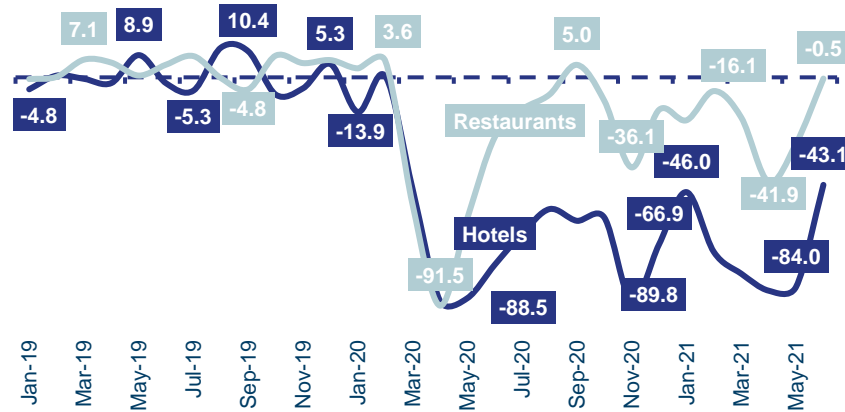
³⁵ Information from Interview with Zilea (association of the tourism stakeholders)

³⁶ *Ibid.*

³⁷ Interview with OECS.

³⁸ INSEE, 2020. *Au 2e trimestre 2020, l'activité économique de la Martinique reste impactée par la crise sanitaire*. Available at: <https://www.insee.fr/fr/statistiques/4800506#titre-bloc-17>

Figure 9: Tourism sector turnover, 2019-2021



Source: Ecorys based on INSEE data

The number of accommodation bookings during Q2 2020 decreased by 93% compared to the same period one year before, which is a similar trend to that observed for Guadeloupe. Consequently, the turnover of the sector (hotels) in April and May decreased by 90% compared to the same period the previous year (Figure 9). Even after restrictions were lifted, the turnover of hotels in June 2020 remained 75% lower compared to June 2019. A similar situation

applies to restaurants, where the turnover in April and May 2020 decreased by 90%.

Commerce and retail

The retail sector is a major contributor to Martinique's economy, with more than 13% of total production. As with many other activities (agriculture and fishing), those of the retail sector are interlinked with tourism.³⁹ As an insular territory, the reduction in commercial exchange had an immediate impact on the island's economy.⁴⁰ Following the pandemic and the introduction of lockdown measures, the sector saw a drop of more than 50% in 2020 compared to 2019.⁴¹ Similarly, as was the case in Guadeloupe, medium and large department stores (and markets) represented the main consumption places prior to the lockdown. As the pandemic set in, consumer preferences shifted towards buying in smaller and local stores during the lockdown. Small commerce, especially those selling equipment goods and clothes, has seen the biggest losses, while smaller food businesses benefited from increased sales during the crisis.⁴² After the lockdown ended, large department stores and markets started recovering, resuming the leading role in retail sales. However, new restrictions introduced over the 2021 summer period are likely to have a negative impact once again on the commerce and retail sector.

Transport

The transport sector is vital to Martinique's economy as it enables commercial exchange and the functioning of other sectors. It recorded a fall of 32% in economic output during the first lockdown. Air transport ceased almost entirely, with hard restrictions put on passenger travel, which led to a slowdown in tourist flows.⁴³ In Q1 2020, Martinique's international airport experienced growth compared to Q1 2019, but the first lockdown brought things to a sudden halt, with airport activity being reduced to only two Air France flights per week. Cargo flights were more resilient, remaining at almost 70% of activity compared to 2019. The airport recorded a turnover loss of about 37% in 2020.

The aviation sector is recovering, albeit at a reduced level of activity, while Martinique has faced higher freight costs as a consequence of the lockdown.⁴⁴ Given that government directives decreed the closure of all borders at the beginning of the lockdown, since March 2020 there has been almost no reopening of routes, except with France. 50% of flights are to mainland France, followed by about 30% to Guadeloupe, while the remaining routes cover the rest of Europe and North and South America.⁴⁵

³⁹ Information from Interview with Zilea (association of the tourism stakeholders)

⁴⁰ Association des CCI d'outre-mer (ACCIOM), 2020. *Outre-mer: L'état d'urgence*. Available at: <https://www.guyane.cci.fr/wp-content/uploads/2021/02/OUTRE-MER-L%C3%89TAT-DURGENCE.pdf>

⁴¹ Interview with CCI Martinique

⁴² Interview with Collectivité Territoriale de Martinique (CTM)

⁴³ Interview with Collectivité Territoriale de Martinique (CTM)

⁴⁴ Interview with CCI Martinique

⁴⁵ Information from interview with Martinique International Airport.

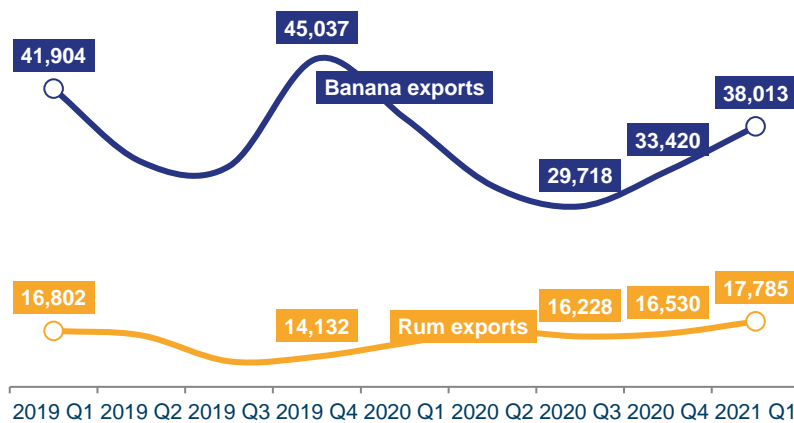
Much like air transport, public transport has slowed down because of the social distancing measures that were put in place. Lower available capacity in public transport, the reduction of traffic, and fewer passengers on board all contributed to the decrease in public transport activity.⁴⁶ While private vehicles remain the most frequently used means of transport, there were almost 160,000 users of the public transport network by the end of 2018. The importance of public transport in Martinique is therefore not negligible.⁴⁷

Agriculture and agri-food

Agriculture was impacted by the COVID-19 pandemic - especially during the first lockdown (March-May 2020) - but unlike other sectors, it exhibited a faster recovery. During the first lockdown it recorded a 6% decrease in production activity, amounting to €3.5 million in lost economic productivity. With diminishing imports during the first lockdown period, the island had turned to local production and shorter food supply chains, which is seen as a positive development by the local government as it can help diversify the sector.⁴⁸

However, in addition to the COVID-19 crisis, 2020 saw several climatic events. A period of drought in April 2020 affected the agriculture sector, especially sugar cane plantations, followed by bad weather conditions (rain) that affected the island's infrastructure.⁴⁹

Figure 10: Banana and rum export (tonnes and HI of pure alcohol)



Source: Ecorys based on IEDOM data

The effects of these events were somewhat mitigated by support measures put in place by the regional government, such as supporting local communities and farmers to compensate for their losses.

Martinique's agriculture is based on the production of bananas and sugar cane, which stimulate exports and have long been the engine of agriculture production. Production of these two crops takes up two-thirds of Martinique's utilised agricultural land.⁵⁰ Exports of agri-products

decreased by 13.9% in 2020, driven by a decrease in banana exports (13.7%), while other agri-product exports, including rum, only counted for a reduction of 0.2%.⁵¹ Exports of agri-food products were affected by the COVID-19 crisis, reflecting a decrease during the first lockdown when compared to the first quarter of 2019 (Figure 10). Banana exports were more volatile, which follows a seasonal trend, with lower levels of exports in the summer months. This volatility links to hazardous climatic events, the vulnerability of the banana crop to pests, and to competition from Latin American banana plantations.⁵² On the contrary, rum exports did not register any negative impacts, increasing by 3% in Q2 2020 and 19% in Q3 2020 (compared to 2019 levels). By Q1 2021, they had recovered and exceeded pre-crisis levels.

⁴⁶ Interview with Collectivité Territoriale de Martinique (CTM)

⁴⁷ IEDOM, 2019, *Rapport annuel*, . Available at: https://www.iedom.fr/IMG/pdf/ra_martinique_vf.pdf

⁴⁸ Interview with CCI Martinique

⁴⁹ Interview with Collectivité Territoriale de Martinique (CTM)

⁵⁰ IEDOM, 2019, *Rapport annuel*, . Available at: https://www.iedom.fr/IMG/pdf/ra_martinique_vf.pdf

⁵¹ IEDOM, 2021, *L'économie de la Martinique en 2020 "je plie, et ne romps pas"*, . Available at:

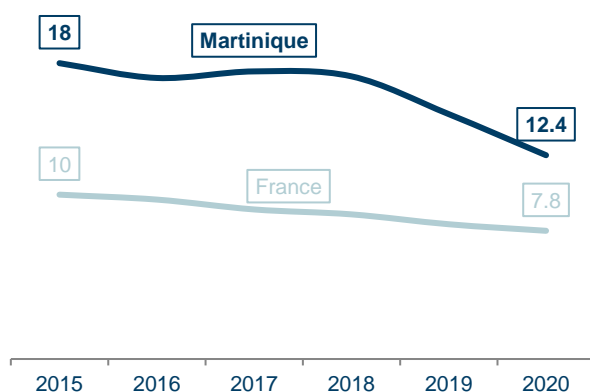
https://www.iedom.fr/IMG/pdf/iedom-ma-synthese-annuelle-2020_vf_3.pdf

⁵² *Ibid.*

3. SOCIAL IMPACT OF THE COVID-19 CRISIS

Martinique faces several societal challenges; a fragile labour market subject to seasonal market variations, negative demographic trends, and a high poverty rate. These issues were exacerbated by the COVID-19 crisis. The unemployment rate in the working-age population (15-74 years) stood at 12.4% in 2020 (Figure 11), much higher than the rate of 8%⁵³ in France (a 4.4% difference), and has converged since 2015, when the different between the two rates was 8%. The youth unemployment rate (for people aged 15-24 years) is also high, at 38% in 2020 compared to 20% in mainland France (according to Eurostat data⁵⁴). This figure has fluctuated since 2015, but has improved since a high of 51% in 2018. The long-term unemployment rates continued their decline since 2013, reaching 7.2% in 2020, which is however consistently higher than the national average (3%) and the EU27 average (2.5%)⁵⁵

Figure 11: Unemployment rate (%), 2015-2020



Source: Eurostat, online data code: TGS00010

In 2017, 29% of Martinicans lived under the poverty threshold. This amounts to 96,400 people, and is over the double of the rate in mainland France (14.1%). In 2020, 30,000 people lived on the minimum wage (*Revenu de Solidarité Active - RSA*) in Martinique, equivalent to approximately 8% of the total population. This segment of the population suffered the heaviest consequences of the COVID-19 pandemic and its associated effects, particularly concerning access to consumer goods and essential supplies. Consequently, there is a growing demand for a social support system driven by the relative poverty of the population.⁵⁶

The impact of the COVID-19 pandemic is most visible in the increase in social benefits, as reflected in the increasing number of beneficiaries of unemployment benefits. The social aid category corresponds to €450 million in Martinique's budget (*Collectivité Territoriale de Martinique - CTM*), with €200 million being allocated only for the RSA (minimum wage). Expenditures on social benefits exceed public revenues, with the gap widening every year by €70 million on average.⁵⁷ Local authorities predict that this gap will likely increase in 2021.⁵⁸ The crisis widened social inequalities, with a worsening situation for people reliant on the minimum level of social support, adding to employment precarity.⁵⁹ With many services closed and few people having access to digital equipment, public authorities struggled to provide the same level of services to their citizens as before the pandemic, as they did not have full access to citizens' social aid files, requests, and demands.⁶⁰

The number of salaried employees in Martinique decreased quarter-on-quarter in the first half of 2020, exhibiting a 1.5% decline in Q1 and another 1.5% reduction in Q2.⁶¹ The private sector was the main driver fuelling higher unemployment levels, with a decrease of 1.9% in the number of salaried workers during Q2 2020. Public sector unemployment levels increased, albeit to a lower extent, with a 0.8% decrease in the number of salaried

⁵³ Eurostat, online data code: TPS00203

⁵⁴ Eurostat, online data code: YTH_EMPL_110

⁵⁵ Eurostat (code: [lfst_r_lfu2ltu]), Long-term unemployment (12 months and more) by sex, age, educational attainment level and NUTS 2 regions (%), Percentage of population in the labour force.

⁵⁶ Interview with Collectivité Territoriale de Martinique (CTM)

⁵⁷ Interview with Collectivité Territoriale de Martinique (CTM)

⁵⁸ Interview with Collectivité Territoriale de Martinique (CTM)

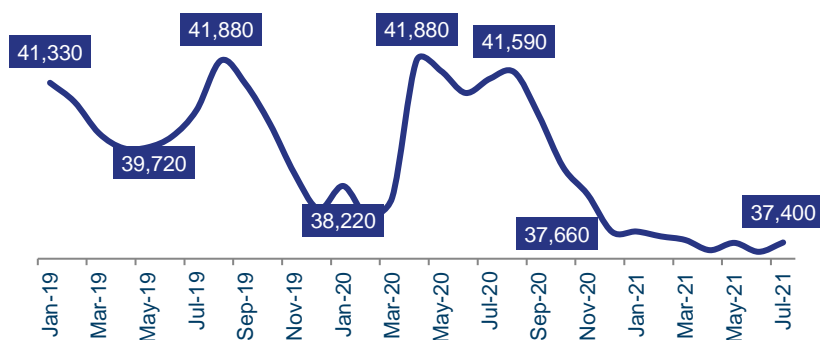
⁵⁹ Interview with the President of CCI.

⁶⁰ Interview with Collectivité Territoriale de Martinique (CTM)

⁶¹ INSEE (2020) *Au 2e trimestre 2020, l'activité économique de la Martinique reste impactée par la crise sanitaire*. Available at: <https://www.insee.fr/fr/statistiques/4800506#titre-bloc-17>

employees. Over the period of one year, paid employment decreased by 1.8%, representing a loss of 2,230 jobs.⁶² Job losses were concentrated in the commercial tertiary sector, with every 3 out of 4 jobs lost being part of this sector. Additionally, self-employed individuals in 'non-essential' businesses accounted for a high share of these job losses.

Figure 12: Jobseekers registered at the end of the month at Pôle emploi in Martinique, Category: A



Source: Ecorys based on Pôle emploi data

As a result of the pandemic, regional unemployment support schemes were relied upon more heavily, as indicated by compensation claims made by workers and employees (Category A⁶³) who lost their jobs due to the crisis (Figure 12). Jobseeker numbers increased by more than 30% in Q1 2020 (i.e. between the beginning of January and the end of March), reaching their highest levels since early

2019. Numbers fell again in August 2020, after economic indicators resumed a more positive trajectory (business confidence index, consumption levels, etc.).

In May 2020, 6,200 companies applied for the partial unemployment scheme, which represents 44,290 employees, or 54% of private-sector employees.⁶⁴ This is higher than the equivalent number in mainland France, where data for May 2020 indicate that 998,000 companies applied for support for 12,100,000 employees (equivalent to 44% of private-sector employees in partial unemployment).⁶⁵ Based on the sectoral distribution of claims, the most affected sectors are wholesale and retail trade, construction, agriculture and food, services to enterprises, and other services (Table 3). While the partial unemployment scheme cushioned the number of jobs lost, it incentivised some companies to limit or suspend their temporary work contracts. Thus, temporary work contracts decreased by 34.3% during Q1 2020 (as compared to Q3 2019), only to recover by a margin of 30.9% during Q2 2020.⁶⁶

Table 3: Partial unemployment compensation claims by sector (September 2020 - April 2021)

	September	October	November	December	January	February	March	April
Agriculture and agri-food	70	70	95	70	30	30	30	25
Industry	45	45	90	50	25	25	15	10
Construction	30	35	50	40	25	20	25	10
Wholesale and retail trade	110	340	645	145	50	40	60	165
Transport	75	70	85	75	40	45	35	30
Accommodation and food	270	325	485	385	150	175	230	215

⁶² INSEE (2020) *Au 2e trimestre 2020, l'activité économique de la Martinique reste impactée par la crise sanitaire*. Available at: <https://www.insee.fr/fr/statistiques/4800506#titre-bloc-17>

⁶³ According to Pôle emploi, Category A are all unemployed people who are actively looking for a job, regardless the type of contract (e.g. temporary or seasonal jobs, full-time, part-time jobs, etc)

⁶⁴ Institut d'émission des départements d'outre-mer (IEDOM) (2020) *Le confinement : un coup de frein économique brutal et massif – Communiqué de presse*. Available at: https://www.iedom.fr/IMG/pdf/cp_note_de_conjoncture_confinement_vf.pdf

⁶⁵ <https://dares.travail-emploi.gouv.fr/publications/situation-sur-le-marche-du-travail-au-5-mai-2020>

⁶⁶ INSEE, 2020. *Au 2e trimestre 2020, l'activité économique de la Martinique reste impactée par la crise sanitaire*. Available at: <https://www.insee.fr/fr/statistiques/4800506#titre-bloc-17>

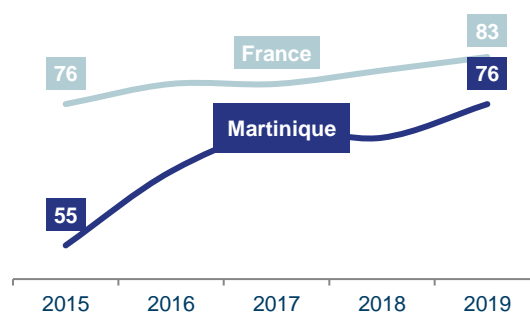
Services to enterprises	180	195	265	175	100	100	105	85
Other services	135	250	460	215	100	90	85	100
Non-market services	40	40	75	50	15	15	15	10
Total	955	1370	2250	1205	535	540	600	650

Source: Ecorys based on Dares data

With a growing and ageing population, Martinique faces demographic challenges. As of 2018, 18.5% of young people in the region were not in employment, education or training (NEET), compared to the French average of 11.4%. Each year around 3,000-4,000 people leave the island⁶⁷, equivalent to 0.8% of the population.⁶⁸ Emigrants are mostly young people leaving the island to pursue their studies abroad, due to limited local employment and educational opportunities. This, in addition to a very limited outlook in the labour market, also encourages a growing share of the adult population - trained or not - to settle in France (mainly in Île-de-France, but also significantly in Occitanie, Provence Alpes-Côte d'Azur, and Nouvelle Aquitaine), or in other countries.⁶⁹ According to INSEE projections, if current trends continue, Martinique could lose an average of 2,500 inhabitants per year between 2030 and 2050.⁷⁰

The COVID-19 pandemic contributed to the growing educational challenges on the island. All schools had to close in accordance with imposed restrictive measures, and even after they reopened, classes did not fully return to the pre-pandemic teaching practices, as the emphasis was placed on protecting teachers and students and limiting their exposure to COVID-19 as much as possible.⁷¹ Thus, online courses became the standard for a while, leaving children with no or limited access to digital equipment at a disadvantage. Local authorities were only able to procure tablets for about 800 children.⁷² To be able to use them, broadband accessibility was also needed. Access to and the use of digital services has improved in Martinique for the past five years (Figure 13). In 2019, 76% of Martinican households had access to broadband, a rate 7% below that of mainland France.

Figure 13: Households with broadband access (%)



Source: Ecorys based on Eurostat data

4. POLICY RESPONSES TO TACKLE THE EFFECTS OF THE CRISIS

OVERVIEW

The EU has mobilised a number of tools and funding sources to help Martinique to overcome the social and economic challenges brought on by the pandemic. The Coronavirus Response Investment Initiative (CRII) and Coronavirus Response Investment Initiative Plus (CRII+) initiatives enabled the use of existing resources that had not been used, and their redirection to where they were most needed.⁷³ Furthermore, as part of the Recovery Assistance for Cohesion and the Territories of Europe (REACT-EU) package, €149 million was allocated to the region - €119 million from the

⁶⁷ Interview with CCI Martinique

⁶⁸ INSEE (2020) La Martinique face au vieillissement de la population: hausse importante du nombre de seniors dépendants à l'horizon 2030. Available at: <https://www.insee.fr/fr/statistiques/4796029>

⁶⁹ IEDOM, 2020. *Martinique – 2019*. Available at: https://www.iedom.fr/IMG/pdf/ra_martinique_vf.pdf

⁷⁰ INSEE (2020) La Martinique face au vieillissement de la population : hausse importante du nombre de seniors dépendants à l'horizon 2030. Available at: <https://www.insee.fr/fr/statistiques/4796029>

⁷¹ Interview with Organisation of Eastern Caribbean States.

⁷² Interview with Organisation of Eastern Caribbean States.

⁷³ [Latest](#) information provided by the European Commission.

European Regional Development Fund and €30 million from the European Social Fund, of which €100 million for the health sector.⁷⁴

The EU Recovery and Resilience Facility (RRF) is a key tool to support recovery. In this context, France developed the Plan National de Relance et de Résilience, the national Recovery and Resilience Plan 2021-2026 (RRP), which lays out nine investment priorities intended to guide recovery over the medium term.⁷⁵ In June 2021 the European Commission adopted a positive assessment of the French plan, indicating that the Recovery and Resilience Facility will provide €39.4 billion in grants to France over the next five years.

At the same time, in 2020, the French government mobilised more than €1 billion in support for Martinique, divided between guaranteed loans, partial activities schemes, and direct aid. In addition to these efforts, the *France Relance* plan dedicates €1.5 billion to the overseas territories.⁷⁶ The plan has three main objectives: (i) the green transition of the economy, (ii) competitiveness of companies, and (iii) the strengthening of social and territorial cohesion. As of December 2020, the plan has brought more than €35 million to the region.⁷⁷

HEALTH SECTOR AND SOCIAL MEASURES

As of December 2020, the CRII and CRII+ initiatives increased EU fund allocations to Martinique's healthcare and health infrastructure through the ESF (European Social Fund) and ERDF (European Regional Development Fund).⁷⁸ From June 2021, REACT-EU strongly contributed to increasing investments in Martinique's health infrastructure.⁷⁹

Several measures were introduced both at the level of the regional and the prefectural authorities:

- **Investments in biomedical equipment:** In April 2020, the regional authority of Martinique (CTM), which is the managing authority for the regional European Regional Development Fund (ERDF) and European Social Fund (ESF) programmes, launched a call for projects investing in medical and sanitary equipment and material. Through this, the University Hospital of Martinique benefited from €19 million for biomedical equipment and to improve disinfection, capacity in critical care, hospitalisation and follow-up care.⁸⁰
- **Provision of facemasks:** The CTM sent out 20,000 facemasks to private caregivers throughout the region.⁸¹ In order to ensure the continuity of the Home Help and Support Services (SAAD)⁸², who provide support to the elderly and/or people with disabilities, the CTM delivered 10,000 masks to the organisation.⁸³
- **Fight against isolation:** A plan to fight isolation includes initiatives to fight isolation in nursing homes and for people who are confined in their homes and aims to guarantee the continuity of care and home support for elderly or dependent people.⁸⁴
- **1 jeune, 1 solution:** The *1 jeune, 1 solution* plan, part of the France Relance plan, will benefit more than 633 young Martinicans with:

⁷⁴ Interview with Philippe Jock, president of CCI ('*Chambre de Commerce et Industry*') and latest information provided by the European Commission.

⁷⁵ Gouvernement français (2021) Plan National de Relance et de Résilience. Available at:

https://www.economie.gouv.fr/files/files/directions_services/plan-de-relance/PNRR%20Francais.pdf

⁷⁶ Préfet de la Martinique (2020) France Relance. Available at: <https://www.martinique.gouv.fr/Actualites/France-Relance>>

⁷⁷ Préfet de la Martinique (2021) France Relance en Martinique: Premier bilan. Available at:

<<https://www.martinique.gouv.fr/Politiques-publiques/France-Relance/France-Relance-en-Martinique-Premier-bilan>>

⁷⁸ Coronavirus Dashboard: EU Cohesion Policy Response to the Crisis. Available at:

<https://cohesiondata.ec.europa.eu/stories/s/CORONAVIRUS-DASHBOARD-COHESION-POLICY-RESPONSE/4e2z-pw8r/>

⁷⁹ *Ibid.*

⁸⁰ L'espace de soins COVID-19 du CHUM : Une modernisation rendue possible grâce au FSE géré par la CTM. Available at:

<https://www.collectivitedemartinique.mq/lespace-de-soins-covid-19-du-chum-une-modernisation-rendue-possible-grace-au-fse-gere-par-la-ctm/>

⁸¹ COVID-19 | 20 000 masques à destination des aidants salariés de gré à gré. Available at:

<https://www.collectivitedemartinique.mq/20-000-masques-a-destination-des-aidants-salaries-de-gre-a-gre/>

⁸² SAAD ('*Annuaire Service d'aide et d'accompagnement à domicile*') is a service provider of personal assistance to households for ordinary and essential activities of people's daily lives, such as meal preparation, shopping, and dressing and undressing.

⁸³ COVID-19 | Des masques remis aux structures d'accompagnement à domicile. Available at:

<https://www.collectivitedemartinique.mq/covid-19-%c7%80-des-masques-remis-aux-structures-daccompagnement-a-domicile/>

⁸⁴ COVID-19 | « Sè yon a lot »: Un plan de lutte contre l'isolement. Available at: <https://www.collectivitedemartinique.mq/la-ctm-et-etat-lancent-un-plan-de-lutte-contre-lisolement-se-yon-a-lot/>

- 341 hiring bonuses of €4,000.
- 112 apprenticeship contracts supported by €5,000-€8,000.
- 180 subsidised jobs.
- **Support to hospital staff:** Under the European Commission's Coronavirus Response Investment Initiative (CRII), the CTM launched a call for projects aimed at supporting hospital staff in the treatment of patients with COVID-19, and to ensure the provision of health assistance to patients and staff of other authorities and/or public services involved in containing the spread of the virus.⁸⁵ The amount allocated to the project was €3 million.
- **Aid to students:** Surveys were sent to all schools in order to identify the number of students without computer equipment and/or connection to ensure pedagogical continuity to less privileged students until the reopening of schools.⁸⁶ The local authority has a stock of digital tablets formatted by CTM technicians which were distributed to the students concerned.

MEASURES IN SUPPORT OF THE ECONOMY

As part of the Coronavirus Response Investment Initiative (CRII) and Coronavirus Response Investment Initiative Plus (CRII+), EU allocations through the European Regional Development Fund (ERDF), European Social Fund (ESF) and Youth Employment Initiative (YEI) funds were used to support workers, enterprises and entrepreneurs to adapt to changes and for R+I processes in SMEs.⁸⁷ Moreover, the REACT-EU package mobilised €19 million in support of the region's economy.⁸⁸ Faced by the COVID-19 pandemic, the CTM set up exceptional aid for affected businesses, separated into support for employment through cash grants and support for the resumption of activity.⁸⁹

- **Fonds National de Solidarité (Part I) and Fonds Régional de Solidarité (Part II):** The CTM has taken steps to strengthen the region's economic sector in the context of the current pandemic. Since the onset of the crisis, more than €80 million have been disbursed to support Martinique's economy. The French government together with the regions put together €7 billion to set up a National Solidarity Fund, which aims to financially support SMEs, self-employed individuals and micro-entrepreneurs across all sectors.⁹⁰ The CTM has contributed €2,021,000 to the fund. The first part of the Fonds National de Solidarité is a mechanism that allowed companies to benefit from flat-rate aid of up to €1,500, paid by the general directorate of public finances. Since March 2020, the directorate has paid more than €3.1 million to 2,300 Martinican companies. In addition, companies may be aided by an extra €5,000, paid by the local authority of Martinique to prevent bankruptcy.⁹¹ Eligible businesses are those with a turnover of less than €1 million and who have suffered a loss of turnover of at least 50% compared to 2019.
- **Fonds de Subvention Territoriale:** The CTM set up a Territorial Subsidy Fund amounting to €37 million. Its aim is to support SMEs and micro-enterprises with a turnover of less than €2 million, which have experienced a turnover decrease of at least 30%, and businesses in the tourism sector. The cash subsidies vary between €1,000 and €10,000 depending on whether a company has completely ceased activity, or has suffered a slowdown in its activity.⁹²

⁸⁵ FSE: AAP COVID-19 n°2 : Préserver la santé des martiniquais « Investir dans les moyens humains ». Available at: <https://www.collectivitedemartinique.mq/fse-aap-covid-19-n2-preserver-la-sante-des-martiniquais-investir-dans-les-moyens-humains/>

⁸⁶ COVID-19 | Éducation: On fait le point! Available at: <https://www.collectivitedemartinique.mq/covid-19-%c7%80-education-on-fait-le-point/>

⁸⁷ Coronavirus Dashboard: EU Cohesion Policy Response to the Crisis. Available at: <https://cohesiondata.ec.europa.eu/stories/s/CORONAVIRUS-DASHBOARD-COHESION-POLICY-RESPONSE/4e2z-pw8r/>

⁸⁸ Latest figures provided by the European Commission.

⁸⁹ Collectivité territoriale de Martinique, 2020. COVID-19 | Dispositifs économiques de soutien aux entreprises. Available at: <https://www.collectivitedemartinique.mq/dispositifs-economiques-de-soutien-aux-entreprises/>

⁹⁰ Collectivité territoriale de Martinique (2020) Un fonds de solidarité pour soutenir les plus petites entreprises impactées par l'épidémie. Available at: <https://www.martinique.gouv.fr/Politiques-publiques/Environnement-sante-publique/Sante/Informations-COVID-19/Un-fonds-de-solidarite-pour-soutenir-les-plus-petites-entreprises-impactees-par-l-epidemie>

⁹¹ Collectivité territoriale de Martinique (2020) Fonds de Solidarité COVID-19: Portail numérique. Available at: <https://www.collectivitedemartinique.mq/fonds-de-solidarite-covid-19-portail-numerique/>

⁹² Collectivité territoriale de Martinique (2020) Fonds de subvention territoriale. Available at: https://les-aides.fr/fiche/apFnDnlGxfTeBGZeTUzZ4_Vm/collectivite-territoriale-de-martinique/fonds-de-subvention-territorial.html

- **Prêt Rebond:** The regional government, in collaboration with Bpifrance, launched the Prêt Rebond in March 2020 intended for micro-enterprises and SMEs.⁹³ The CTM has contributed €2 million for this measure. The aid takes the form of zero-interest loans that aim to strengthen the cash flow of companies and their investments. Companies with an active balance sheet can benefit from loans between €10,000 and €300,000 for a period of 7 years and a grace period of 2 years.⁹⁴ It is granted without securing company assets as collateral.
- **Prêt Territorial COVID-19:**⁹⁵ A zero-interest loan for a period of 7 years, of up to €60,000, financing up to 50% of needs.⁹⁶ SMEs and micro-enterprises established in Martinique - able to prove real cash flow difficulties and having been in operation for at least six months - are the beneficiaries of this support.
- **Digital Transformation aid:** The CTM has also set up emergency aid for the digital transformation of SMEs suffering from the consequences of COVID-19.⁹⁷ The online platform went live in March 2021. The measure aims to accelerate digital modernisation to allow all traders, craftsmen, hotel and restaurant professionals to develop their online activity. Companies with fewer than 10 employees can benefit from support of up to €8,000.
- **Fonds de solidarité en faveur des artistes en difficultés:** A solidarity fund was also set up by the CTM to grant exceptional aid to artists to enable them to cope with difficult personal situations. Cultural and artistic scholarships to students were paid in full for the 2019/2020 school year. Subsidies were given to organisations of events and the implementation of cultural projects.

In addition to the efforts of the region in collaboration with the national government, the France Relance plan has also significantly contributed to Martinique's recovery.⁹⁸ €9.4 million has been mobilised for the energy renovation of government buildings. Nearly €16 million has been used for down-payments to local authorities to guarantee their tax revenue, including dock dues. Another €6 million has been utilised for investments in favour of agglomerations for the implementation of the emergency water plan.⁹⁹ Six companies have benefitted from the plan's *chèques export* (export vouchers) to encourage them to continue to operate internationally. In 2021, the regional industry is benefiting from a €32 million reduction in production taxes, in a sustainable manner.

In addition, several nation-wide measures that included outermost regions were rolled out, including:

- **Prêt garanti par l'État (PGE):** To manage the economic shock caused by the COVID-19 crisis, the French government has set up this exceptional guarantee mechanism to support the bank financing of companies, amounting to €300 billion, and it is open to all companies until the end of December, 2021.⁷⁸ These are intended for all firms, regardless of their location within the French territory, their size and legal form (SMEs, midcaps, farmers, artisans, merchants, liberal professions, innovative companies, micro-entrepreneurs, associations and foundations with economic activity). Certain credit institutions and financial companies are excluded.
- **Subvention Innovation Outre-mer:** This measure provided direct grants, ranging from €20,000 to €100,000, for regional start-ups and entrepreneurs.¹⁰⁰ These grants aimed at financing successful innovative

⁹³ Collectivité territoriale de Martinique (2020) COVID-19 | Dispositifs économiques de soutien aux entreprises. Available at: <https://www.collectivitedemartinique.mq/dispositifs-economiques-de-soutien-aux-entreprises/>

⁹⁴ Prêt Rebond A Taux 0 pour les TPE-PME. Available at: <https://pret-rebond.collectivitedemartinique.mq/>

⁹⁵ Prêt territorial COVID-19. Available at: [https://les-aides.fr/fiche/apFnDnZGxfTeBGZeTUzZ4_Vm/collectivite-territoriale-de-](https://les-aides.fr/fiche/apFnDnZGxfTeBGZeTUzZ4_Vm/collectivite-territoriale-de-martinique/pret-territorial-covid-19.html)

https://les-aides.fr/fiche/apFnDnZGxfTeBGZeTUzZ4_Vm/collectivite-territoriale-de-martinique/#:~:text=Le%20Pr%C3%AAt%20territorial%20Covid%2D19&text=%E2%80%93%20Montant%20du%20pr%C3%AAt%20maximum%20%3A%2060%20depuis%20au%20moins%206%20mois

⁹⁷ Collectivité territoriale de Martinique (2020) COVID-19 | DIJITAL TPE: Ouverture de la plateforme. Available at: <https://www.collectivitedemartinique.mq/covid-19-%c7%80-dijital-tpe-aide-durgence-a-la-transformation-numerique/>

⁹⁸ Préfet de la Martinique (2021) France Relance en Martinique : Premier bilan. Available at:

<https://www.martinique.gouv.fr/Politiques-publiques/France-Relance/France-Relance-en-Martinique-Premier-bilan>

⁹⁹ A short-term operational emergency plan has been adopted to increase drinking water production capacity, guarantee the fairness of water cuts and strengthen the efficiency and transparency of the drinking water distribution system in Martinique.

¹⁰⁰ Subvention Innovation Outre-mer. Available at: <https://www.bpifrance.fr/Toutes-nos-solutions/Aides-concours-et-labels/Aides-a-l-innovation-projets-individuels/Subvention-Innovation-Outre-mer>

processes to ensure their entry to the market even during times of financial distress caused by the pandemic.

- **Subvention Investissement Outre-mer:** This grant scheme has supplied SMEs in the French outermost regions with direct grants, ranging from €20,000 to €100,000, to be used as investment expenditures for the reduction of energy consumption and environmental impacts.¹⁰¹

REFLECTIONS ON MEASURES¹⁰²

Due to the stage of implementation and lack of available monitoring information, it is difficult to assess the effectiveness of these measures. However, based on stakeholder interviews and available information, the measures have been largely relevant. Stakeholders in Martinique have generally rated the response to the crisis positively. Multiple stakeholders noted that compared to previous crises – support measures were put in place very quickly, with strong complementarities among regional authorities.

The most effective measure, which has prevented multiple business closures, is the partial activity scheme. Solidarity funds were key to supporting the self-employed, which would have otherwise risked losing all sources of income. Prêt Rebond and Prêt garanti par l'État have been received with some reticence; very small enterprises were generally cautious about applying for such loans, fearing indebtedness. Furthermore, even companies that received such loans have made few (or no) new investments since the onset of the pandemic. As business owners have generally managed on a day-to-day basis, with no certainty about when 'normality' might resume, entrepreneurs have often preferred to save, and intended to use the loans to restart their activities when feasible.

EU support was particularly important to address the most pressing concerns in Martinique: Coronavirus Response Investment Initiative (CRII), Coronavirus Response Investment Initiative Plus (CRII+) and REACT-EU have had a positive impact on the provision of materials and equipment for the health sector of the island.

Stakeholders also noted that – while the measures introduced are effective and well-targeted – the administrative machine is considered heavy and slow. For example, the national recovery plan was intended to quickly inject money into the economy, but the perceived slowness of the regional administration is deemed to be impacting the swift disbursement of such funds. In the initial phase of the pandemic, the CTM was overburdened by requests and was not able to react to all key private actors as it would have intended. The Chamber of Commerce and Industry (CCI) provided support in informing all potential beneficiaries and double-checking the administrative steps. Finally, interviewed stakeholders acknowledge that existing bureaucratic steps are in place to limit the risk of fraud; nevertheless, they suggest that ex-post control would have enabled the swifter implementation of such support measures.

5. FUTURE PROSPECTS

Available economic data for Martinique indicate that the region has already initiated a slow economic recovery in 2021. However, it is impossible to predict when Martinique's economy will regain pre-COVID-19 performance levels, as uncertainties related to global economic and pandemic-related developments (e.g. vaccine rollout, and the emergence of new, more contagious variants) remain and will affect the economic growth of the region.

According to projections by IEDOM (*Institut d'émission des départements d'outre-mer*), households and businesses in Martinique accumulated a cumulative additional one billion Euros in 2020 in current account funds. In addition, a majority of Martinican companies (59.5%) reported increasing or stable turnover in Q1 2021, and a majority (71%,

¹⁰¹ Subvention Investissement Outre-mer. Available at: <https://www.bpifrance.fr/Toutes-nos-solutions/Prets/Prets-sans-garantie/Subvention-Investissement-Outre-mer>

¹⁰² The reflections on the measures are mainly based on stakeholder feedback collected in the period January-July 2021. These should be treated as initial feedback and insights from the measures rather than an evaluation. The final report attempts to provide a more detailed review of the measures in terms of relevance and outputs achieved.

against 65.3% in the previous quarter) anticipate increasing or stable turnover for the 2021 calendar year as a whole. However, the insularity and the strong dependence of the region on the tourism sector could slow down the pace of recovery and make it less certain.

Interviewees consulted for this fiche pointed out that in the short term, economic recovery will hinge on the confidence of consumers and business owners, and whether they feel sufficiently optimistic about the future to begin spending accumulated cash. In the long term, Martinique's prospects will also depend on public spending and investment, and the ability of the national and regional governments to address underlying structural economic challenges. The COVID-19 crisis showed that a number of sectors need structural investments, including the water and waste management sector, as 25% of Martinique's waste is placed in landfill, which might otherwise be used to support alternative forms of power generation. In addition, improvements in the digital industry provide an opportunity for Martinique to counter the negative demographic trends that affect the economic growth of the region.

In terms of the sectoral perspective, tourism was significantly reduced in 2020, and it is expected to recover slowly. According to tourism stakeholders, even if the sector recovers slightly with respect to 2020, almost half of potential turnover has already been lost for 2021. Furthermore, the crisis has led to losses for investors. Some of those who have their own assets in the hotel industry have responded by selling property and shifting investment to more profitable activities associated with less risk. The recovery of the sector is expected to be heavily dependent on future COVID-19 developments and the related measures put in place by national and regional authorities. Between July and August 2021, the rapid increase in the number of infections forced regional authorities to introduce further restrictions that could negatively affect the sector. These restrictions included curfews between 9PM and 5AM, and the closure of beaches and non-essential shops.

Air transport has seen a resumption in the first half of 2021, which was expected to continue in the remaining months of the year, driven by passenger flows in July and August, when Martinicans living in mainland France often return to Martinique. Many students also tend to return to mainland France in September. According to airport estimates, passenger numbers in 2020 were 50% of those of 2019, and it is expected that they will be approximately 70% in 2021, and 80% in 2022. A return to normality in the transport sector is not expected before 2023. The situation remains fragile and uncertain as it heavily depends on the restrictions affecting movements between Martinique and mainland France, and vaccination progress in popular destinations for Martinicans and foreign tourists, such as the Caribbean.

The construction sector suffered a steep decline in economic activity during the first lockdown period (March-May 2020) but recovered in the second half of 2020 and resumed pre-crisis performance in the first half of 2021. However, considerable uncertainties related to the volatility of the global market remain, including increases in commodity prices, which have the potential to limit the sector's performance in the short- to mid-term. Ensuring the supply of construction materials necessary to carry out current orders will therefore play a critical role.

6. SUGGESTIONS FOR RECOVERY AND RESILIENCE MEASURES

RECOMMENDATION 1: BRINGING TOURISTS BACK TO THE REGION AND DIVERSIFYING THE MARKET

Type of measure: Customer diversification, investment

Duration: Short to long-term

Challenge: Martinique's tourism sector needs to recover and transform. Progress has already been made in terms of applying digital solutions to the sector, and improving its sustainability. However, the region is now faced with the primary challenge of bringing tourist activity back to pre-pandemic levels, and sustaining those levels. The sector relies heavily on tourists from mainland France, which make up 70% of the island's visitors. This means that measures or

developments in one country strongly affect its entire tourism sector. The tourism sector in Martinique also struggles with high seasonality, with the sector typically coming to a near-standstill during off-season months.¹⁰³

Objective: Support the recovery of the tourism sector and build its resilience through diversification.

Actions: In the short-term, it would be prudent to maintain a focus on the traditional tourist base from France and the EU. Campaigns presenting Martinique as an attractive and safe option, and targeting French tourists, may appeal to the idea of travelling 'within France'. Initiatives such as the SafeTravels Stamp from the World Travel & Tourism Council could be used by the regional government to highlight efforts made to comply with safe travel protocols.¹⁰⁴ *Atout France*, the French Tourism Development Agency, launched a €10 million campaign in May of 2021 encouraging Europeans to travel to France.¹⁰⁵ The regional government could benefit from similar efforts to encourage travel to Martinique. Traveller confidence can also be restored by informing tourists about the safety measures adopted in the region.

In the mid- to long-term, there is a need for Martinique to attract tourists from different countries, by raising awareness and marketing promotion to attract tourists from other parts of Europe. Given Martinique's geographic and strategic location and proximity to the USA, Latin America and other Caribbean countries, there is an untapped opportunity to increase its outreach and marketing efforts. By attracting tourists from different geographical locations, tourism activity may be more evenly distributed throughout the year.

A first step towards this direction might involve conducting a study on the travel experience preferences of the targeted tourist segments. This mapping could then guide the setup and implementation of two key actions. First, the actions required to promote Martinique would need to be clearly defined in line with the results of the mapping. It can already be anticipated that there will be a need to improve hospitality and language skills (English and Spanish) of personnel in the restaurant and accommodation sector. Subsidised courses (e.g. for 1–2 weeks of intensive language training for the basic phrases needed in tourism), coupled with vocational training to strengthen service provision, might be organised by the Martinique Tourism Office in collaboration with educational institutions in the region.

Secondly, a marketing and communication strategy will be needed to ensure that the target group is reached through targeted tools, e.g. use of social media channels, improved awareness building and branding, amongst others. Depending on the country of origin, income, and age group of the tourist segments most likely to visit Martinique, various communication channels could be used to maximise outreach.

Martinique could explore funding, e.g. from the European Territorial Cooperation programmes, which are co-funded by the European Regional Development Fund and from the European Social Fund.

RECOMMENDATION 2: FACILITATING ACCESS TO CREDIT FOR ENTREPRENEURS

Type of measure: Financing and business support

Duration: Medium-term

Challenge: Over the course of the pandemic the national and regional governments rolled out multiple grant and loan schemes to help companies stay afloat. Stakeholders, however, pointed out that for a strong economic recovery, Martinique needs to improve its pre-financing ecosystem to allow for the creation of enterprises. Start-ups have

¹⁰³ In part due to the hurricane season, but also due to the vacation patterns of the French population.

¹⁰⁴ The SafeTravels Stamp was created for travellers to recognise destinations and businesses around the world which have adopted the SafeTravels health and hygiene global standardised protocols.

¹⁰⁵ <http://www.atout-france.fr/content/covid-19-1>

typically been unable to access finance. Emerging sectors in particular, such as digital services and renewable energies, could benefit from a relaxation of the requirements to obtain credit.

Objective: To stimulate economic recovery by encouraging business creation in the post-pandemic period.

Actions: Following the outbreak of the pandemic, the PGE loans (outlined in Section 4) became available to enterprises to support their bank financing. Enterprises can apply until 31 December 2021. However, stakeholders interviewed in March of the same year revealed that 50% of those loans were unused. As indicated, this was due to two main reasons:

- The economy of the island is mainly composed of micro-enterprises, many of which are not well organised in an administrative sense, and could not provide the required documents.
- Being a micro-enterprise does not always facilitate a long-term outlook for the future, and many such 'lifestyle businesses' do not wish to become indebted. At the same time, this lack of a long-term outlook also makes financial institutions hesitant to provide access to credit.

As a result of this lack of administrative capacity and fear of indebtedness, many enterprises are facing bankruptcies. State aid in the form of grants or subsidies is preferred over loans. Thus, one option would be to establish a grant facility connected to a business advisory service to support gradual recovery. The scheme could build on the National and Regional Solidarity Funds, and the Territorial Subsidy Fund. Companies that are eligible (or already obtained those funds) could be eligible for this new scheme. As businesses eligible for this scheme face insolvency, a dedicated task force – composed, for example, of representatives of regional business associations, the regional authorities and external business advisers – might be established at the regional level to assess the survival prospects of struggling businesses before approving the disbursement of grants. Technical support would guide the disbursement of these funds and agree on their use with the recipients. As a result, public funds would only be channelled to companies well-positioned to recover.

Martinique could explore funding, e.g. from the EU Programme for Employment and Social Innovation that provides senior and subordinated loans to eligible financial intermediaries in order to increase their capacity to provide financing to micro-enterprises. The European Regional Development Fund (ERDF) could also be explored.

RECOMMENDATION 3: MODERNISING AND DIVERSIFYING THE FISHING SECTOR

Type of measure: Diversification, sustainability, skills development, and policy development

Duration: Medium to long-term

Challenge: Martinique's fishing sector catches are mainly sold locally. The lack of tourists entering the region over the past year has negatively impacted the industry. Even before the pandemic, the industry had stagnated, having a limited impact on employment and economic growth.¹⁰⁶ This is partly explained by the pressure on the fish stocks, which limits the potential to expand the volume landed yearly.

Objective: Increase the sector's added value through increased productivity and diversification, building in synergies with other coastal activities and the tourism industry.

Actions: Given the abovementioned challenges, there may be room for intervention in multiple ways. It is essential to develop knowledge-sharing activities between fishermen, increase their access to capital, diversify the sector, and upgrade the existing fleet. First, raising awareness among fishermen regarding best practices to increase the quality

¹⁰⁶ European Commission (2017). Realising the potential of the Outermost Regions for sustainable blue growth. available at: https://ec.europa.eu/regional_policy/sources/policy/themes/outermost-regions/pdf/rup_2017/rup_sust_blue_growth_en.pdf

of catches, e.g. fishing only in certain areas, improving onboard ice storage for smaller vessels, reducing the amount of fish wasted because of poor storage. In parallel, the *Pôle emploi* (employment centres) could consider offering specialised training in cooperation with the Cluster Maritime Martinique¹⁰⁷ to increase the level of fishermen's education, particularly that of young professionals. This could include the involvement of the French Maritime Academy for training purposes, as has been tested in Guadeloupe.¹⁰⁸

The diversification of the sector is already underway, e.g. with the development of aquaculture on the island.¹⁰⁹ Further diversification could be achieved by better integrating the sector with local touristic offerings. Pesca-tourism could offer alternative revenues to fishermen without impacting the volume of catches. A sustainable strategy for pesca-tourism could include cooperation between local authorities, fishermen – e.g. under the Cluster Maritime Martinique – and the Comité Martiniquaise du Tourisme (Martinique's Tourism Committee - CMT). Basic language training (as discussed in the first recommendation) could also be offered to fishermen interested in pesca-tourism. Local authorities, the CMT, and the Cluster Maritime Martinique could establish a task force to provide technical assistance to fishermen to access loans and other sources of financing. This is required to improve the safety onboard and to make their vessels suitable for tourists. Finally, the CMT could promote the emerging sector, advertising it on its website¹¹⁰ and acting as a facilitator between different stakeholders involved in tourism and fishermen. Martinique could explore funding from domestic sources and the European Social Fund to implement this recommendation.

RECOMMENDATION 4: DEVELOPING SKILLS NEEDED TO MEET THE REGION'S PRESENT AND FUTURE NEEDS

Type of measure: Investment, training and skills

Duration: Medium to long-term

Challenge: The outbreak of the pandemic has highlighted the lack of workforce education and training in Martinique. The implementation of lockdown measures and the closure of businesses required a certain level of innovation, but not all managers possessed the necessary skills and knowledge to adapt to the 'new normal'. This is a challenge, as 90% of Martinique's businesses are micro-enterprises with only one employee. In addition, some of the upcoming economic activities in the region (e.g. renewable energy, digital services, agro-processing) and the lack of skilled employees to support them is a recognised problem. At the same time, the unemployment rate remains elevated. To reduce unemployment, it is important to equip the working population with appropriate skills. This will help to promote economic development while reducing unemployment levels. Training for the population, especially young people, in skills required in the current economy and especially in promising new sectors will be of particular importance to both expand the sectors and to make Martinique's workforce more resilient to future shocks.

Objective: Supporting future careers by training and upskilling the workforce (including active jobseekers).

Actions: Stakeholders identified future employment opportunities in the fields of clean energy infrastructure, digitalisation and internet infrastructure, and agro-transformation to more local production. An assessment of the required skills in these sectors could be made, and used to develop and implement appropriate vocational training offers. Such an assessment could then be considered by *Pôle emploi*, professional associations and the Chamber of Commerce and Industry to promote the design of new vocational training and the establishment of new apprenticeship schemes. The regional government could consider subsidising those apprenticeships and vocational training offers,

¹⁰⁷ For more information see: <https://www.cluster-maritime-martinique.org/>.

¹⁰⁸ See for references: http://www.ifmer.org/assets/documents/files/revues_maritime/491/7Formation-maritime-oultre-mer.pdf and <http://www.cluster-maritime-guadeloupe.fr/nos-actions/>.

¹⁰⁹ See for example: Grow RUP – Martinique Plan of Action 2020-2021, available at: https://www.interregeurope.eu/fileadmin/user_upload/tx_tevprojects/library/file_1586949849.pdf.

¹¹⁰ Available at: <https://us.martinique.org/>.

which in turn would better enable businesses to hire apprentices. The eventual impact would be reduced regional unemployment.

In addition, such an assessment might analyse the extent to which other types of support are needed. It could partially build on ongoing projects, such as high-speed internet connection projects.¹¹¹ Martinique's regional government has already prioritised digitalisation and career change support, which could be built on for a larger impact.

Martinique's regional government could explore the possibility of using funding from the European Social Fund (ESF) in support of this recommendation.

RECOMMENDATION 5: SUPPORTING THE DIGITAL MODERNISATION OF HOUSEHOLDS

Type of measure: Investment and access to digital tools

Duration: Medium to long-term

Challenge: Since 2015, access to digital services has been improving in Martinique. In 2019, 76% of households had access to broadband; 7 percentage points below the level of mainland France. Following the outbreak of the pandemic, the regional government set up emergency aid for businesses to support their digital transformation (see Section 4).

However, the COVID-19 pandemic caused educational disruption due to school closures and restrictive measures. Even after reopening, classes did not follow pre-pandemic teaching practices, and online classes became the norm. This left some students with limited (or no) access to digital equipment such as laptops, or to the internet. Local authorities distributed 800 tablets to households, but this was not enough to enable educational participation for all students.

Objective: Increase access to digital equipment for households by providing financial support.

Actions: To address present needs and mitigate the effects of any similar future crises, it is crucial to strengthen digitalisation efforts in Martinique. In parallel with the ongoing efforts to improve access to the internet, it would be beneficial to provide financial support to households, to enable families with school-age children to purchase the necessary digital equipment to continue their education remotely with no further disruptions. Similarly to the emergency aid set up by the regional authorities to help SMEs develop their online activity (as outlined above), grants to disadvantaged households might help to promote regional digital literacy and bridge the digital divide.

Martinique could explore funding from the national government sources, the European Regional Development Fund (ERDF) or the Digital Europe Programme's funding channels to support digitisation.

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¹¹¹ The Commission approved two major projects for high-speed broadband networks in Martinique in 2019, to be supported by the European Regional Development Fund.

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