

Outermost Region Fiche **MAYOTTE**

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

Region Mayotte

Country France

Size (2016) 367 Km²

Number of inhabitants (2020) 278 926

Population density (2019) 750.8 per Km²



EUROPEAN COMMISSION

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

Outermost Region Fiche Mayotte

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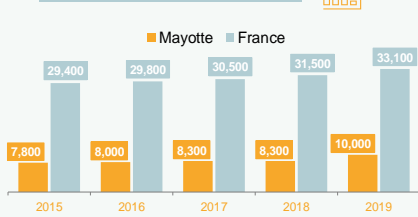
INTRODUCTION

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 Mayotte, 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 Mayotte, as well as the 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 examine future prospects for social and economic recovery 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 Mayotte

GDP/capita

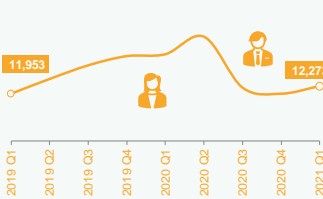


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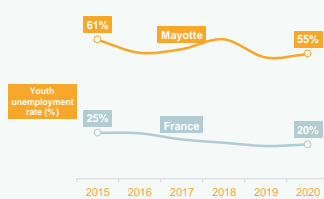


estimated drop in economic productivity in 2020

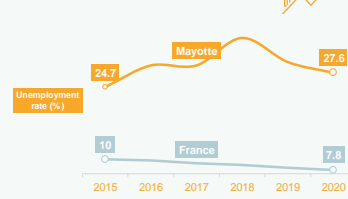
Number of jobseekers



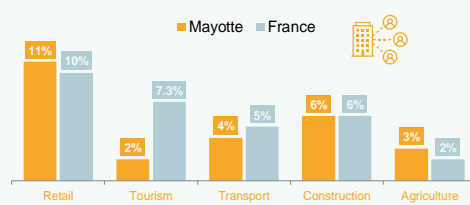
Youth unemployment rate



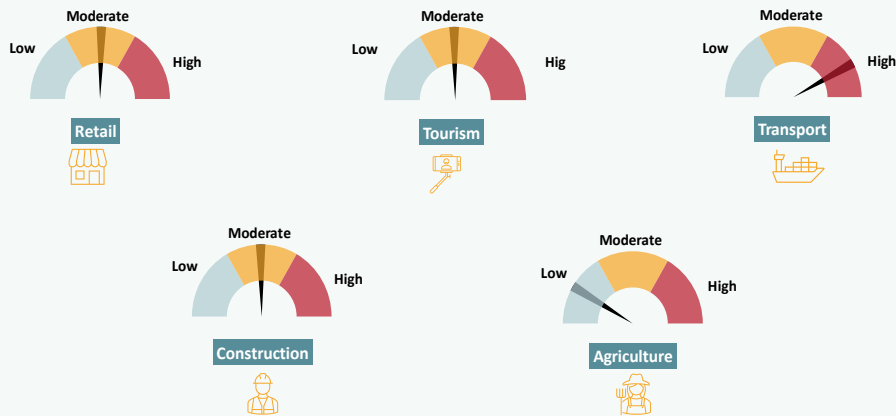
Unemployment rate



Share of key sectors within the economy as % of GDP - 2017



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



Recommendations



Extending formalisation support

Strengthening agricultural productivity through a strategic action plan for the sector



Supporting the digital modernisation of businesses

Increasing healthcare provision

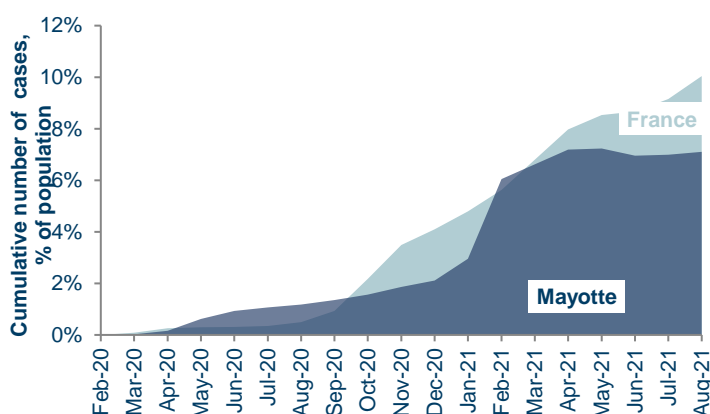


Enhancing educational capacity and skills

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

Overall, in terms of health-related statistics, Mayotte has recorded lower COVID-19 infection rates than mainland France. As of December 2020, cases made up 2.1% of the population in Mayotte, in comparison with 4.1% in France. The Mahoran situation significantly worsened from February 2021 (Figure 1). The incidence rate surged to more than 850 cases per 100,000 people in February 2021, and as of 21 March 2021, cumulative total recorded cases surged to 19,006 (approximately 6.8% of the official population, higher than mainland France). However, daily cases declined in March, and cases have remained low and stable since April 2021. At the end of August 2021, there were 19,804 cumulative recorded cases in the region, with 175 deaths. 27% of the population were fully vaccinated, compared to 59.9% in mainland France at the time.¹

Figure 1: Cumulative COVID-19 cases over total population, in percentages (Feb 2020 – Aug 2021)



Source: Ecorys, based on WHO data

2020. The first cases of COVID were detected at the same time (March 2020), hampering an effective medical response by overwhelming the medical capacity.² An initial lockdown was successful in suppressing new cases over the summer of 2020, though Mayotte was the last French overseas territory to see restrictions lifted. Following a new surge in cases in autumn 2020, partial restrictions (including a limit on the number of people permitted to socialise in groups) were introduced on 17 October 2020.

Responsibility for COVID-19 control measures in Mayotte ultimately lies with the (central) state government in Paris, but decisions are made in liaison with the *Préfet de Mayotte* (i.e. the representative of the government on the island), and the Regional Health Agency (ARS). Following a sharp increase in cases since December 2020 and a decision by the *Préfet* and the ARS, Mayotte was under 'general confinement' from 5 February to 15 March 2021.³ In practice, this second total lockdown meant that businesses and schools were closed, and travel (even locally) was subject to penalty for citizens lacking a certificate to travel.

Mayotte faces several challenges concerning COVID-19 suppression and population recovery. Firstly, a large proportion of the population of Mayotte is made up of irregular immigrants, and it is likely that many cases go unrecorded. Also, Mayotte suffers from limited healthcare capacity and hospital beds (see below). Furthermore, Mayotte was the last French overseas region to receive a COVID-19 vaccine shipment.

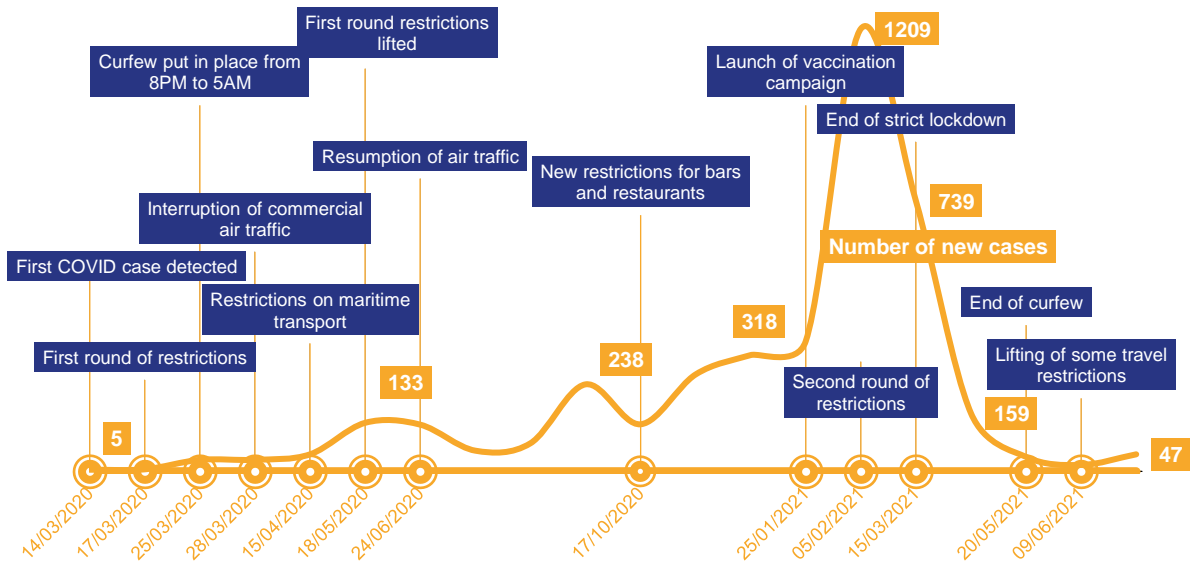
Figure 2 provides an overview of the COVID-19 timeline in Mayotte. The COVID-19 pandemic was exacerbated by a dengue epidemic that intensified in the spring of

¹ Our World in Data. Available at: <https://ourworldindata.org/covid-vaccinations?country=FRA>

² World Health Organization. 2020. Dengue fever – Mayotte, France. Available at: <https://www.who.int/csr/don/23-april-2020-dengue-mayotte-france/en/>

³ Préfet de Mayotte. 2021. Confinement généralisé : poursuivre nos efforts pour surmonter la troisième vague de l'épidémie de COVID 19. Available at: <https://www.mayotte.gouv.fr/content/download/21771/167497/file/20210225%20CP%20-%20prolongation%20du%20confinement.pdf>

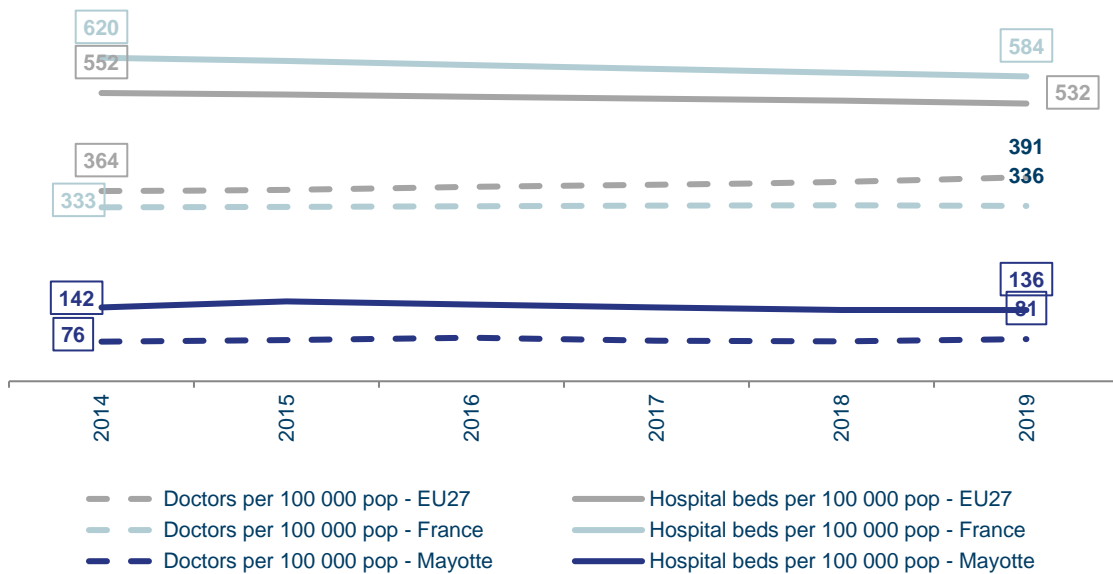
Figure 2: Timeline and number of new COVID-19 cases in Mayotte



Source: Ecorys, based on WHO data

Mayotte has limited medical facilities (Figure 3). It has a single hospital - the CHM (Mayotte Hospital Centre) in Mamoudzou – with 16 intensive care beds, approximately 2,250 staff, and 250 doctors to care for an official population of 279,000 (although irregular migration means that the true figure is likely much higher, with some estimates putting it at 450,000).⁴ This limited capacity exists in a wider context of limited public spending and social deprivation. Per capita, health expenditure is four times lower than in Réunion, and half that of French Guiana (Guyane). Life expectancy is lower than in mainland France by almost seven years.⁵

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



Source: Ecorys, based on Eurostat data

Because Mayotte lacks the medical facilities to treat all COVID-19 patients, approximately 80 ICU (intensive care unit) patients were transferred to Réunion (as of March 2021). The travel time between Mayotte and mainland France (10 hours from Paris) makes medical repatriation challenging because of the in-flight medical facilities required.

According to local stakeholders, Mayotte has struggled to source and import masks, alcohol gel, and other necessary supplies. This has necessitated a reliance on military logistics. The French state and the region have also been hard-pressed to avoid food stock shortages. In light of these issues, and following worsening case statistics and criticism of central government efforts by leaders and citizens in Mayotte, emergency support has been ramped up.⁶ For example, on 7 February 2021, soldiers from the French army medical regiment were sent to Mayotte to bolster support,⁷ and on 26 February 2021, a new emergency care unit was opened in Petite Terre (the smaller island to the east of the main island, Grande-Terre – see Figure 6).

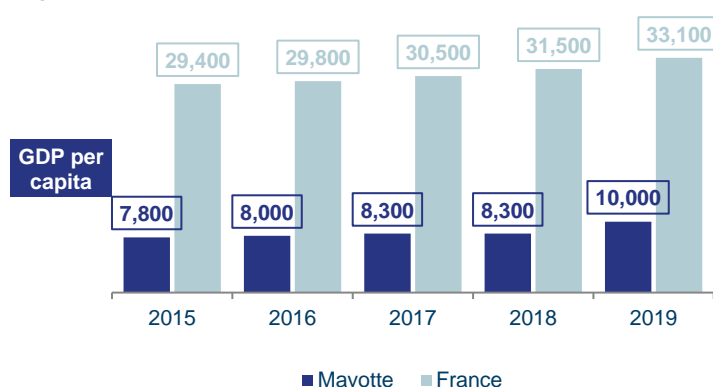
The effectiveness of regional control measures in Mayotte has been hampered by non-compliance and the contradictory health and economic pressures facing local inhabitants. On the one hand, reduced movement, social interactions, and business closures are necessary to suppress transmission. On the other hand, widespread poverty and the large informal economy in Mayotte mean that some inhabitants – especially irregular immigrants, who are not eligible for state welfare support – cannot afford to stop working. The economic and social implications of this contradiction are explored further in the following sections. Media reports (for example, in February 2021) have indicated that adherence to COVID-19 control measures has been lax, and that basic precautions such as mask-wearing were often disregarded.⁸

2. ECONOMIC IMPACT OF THE COVID-19 PANDEMIC

MACROECONOMIC OVERVIEW

Mayotte is the least economically prosperous French *département*. Its gross domestic product (GDP) per capita in 2019 was four times lower than that of mainland France, three times lower than that of Réunion, and 35% of the EU27 average (€31,200). There has been no discernible progress towards convergence since 2015 (Figure 4).

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



Source: Ecorys, based on Eurostat data

Mayotte is geographically isolated, situated approximately 8,000 km from mainland France, almost two hours by plane from the nearest French department (Réunion), and with non-daily direct flights to mainland France before the current flight restrictions were introduced. Its economy is based heavily on the tertiary sector – trade, retail, and basic services – with a lesser economic contribution through agriculture (cash crops), fishing, and the tourism sector. The latter is underdeveloped

⁴ Eurostat (2020) Population on 1 January by NUTS 2 region, online data code: TGS00096. Available at:

<https://ec.europa.eu/eurostat/databrowser/view/tgs00096/default/table?lang=en>

⁵ Cour des Comptes – Mayotte (2020) Centre hospitalier de Mayotte (CHM) - Exercices 2015 et suivants. Available at:

<https://www.ccomptes.fr/fr/publications/centre-hospitalier-de-mayotte-chm-exercices-2015-et-suivants>

⁶ Kizzi Asala and Euronews with AFP (2021) Mayotte Struggling Against COVID-19. Available at:

<https://www.africanews.com/2021/02/26/lockdown-in-mayotte-extended-as-coronavirus-cases-soar>

⁷ Ministère des Armées (2021) COVID-19 à Mayotte: l'armée de Terre en renfort. Available at:

<https://www.defense.gouv.fr/terre/actu-terre/covid-19-a-mayotte-l-armee-de-terre-en-renfort>

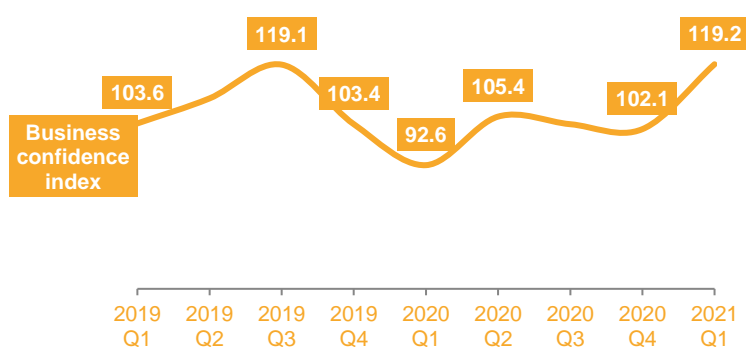
⁸ Chamsidine, S. and Charlton, A. (2021) Surging virus in French African outpost reveals inequalities. The Associated Press.

Available at: <https://apnews.com/article/travel-europe-africa-mayotte-oceans-1ead16632ac7f57cb1f38017845fe6a6>

compared to some other outermost regions, in 2019 Mayotte registered the lowest number of nights spent in tourist accommodation relative to the resident population, 373 per 1000 inhabitants⁹.

From an economic perspective, the first COVID-19 wave and lockdown in early 2020 had a relatively limited impact in Mayotte compared to mainland France. CEROM (*Comptes Économiques Rapides pour l'Outre-mer*) reported a rebound in the economy shortly thereafter, with economic activity estimated at 7% below normal (i.e. the non-COVID-19 counterfactual scenario) in June 2020, compared to a loss of 18% at its lowest point in March-April 2020.¹⁰ After a gradual resumption of formal economic activity, thanks to the progressive relaxation of measures from June 2020 onwards, the loss of economic productivity in the commercial sector was estimated at -12% against -14% in mainland France (again compared to the counterfactual non-COVID-19 scenario).¹¹ This recovery was reflected in Mayotte's business confidence index (Figure 5), which increased in Q2 2020 after a low of 92.6 in Q1 (where 100 = the average level of confidence in 2019).

Figure 5: Business confidence index, Mayotte*



*100 = the average level of confidence in 2019
Source: Ecorys based on CEROM data

Economic productivity statistics for the second COVID-19 wave in Mayotte (Q1 2021) are not yet available; therefore, the economic impact is not yet possible to quantify.

The economy of Mayotte is characterised by four key structural features, which have shaped both the economic impact of the COVID-19 pandemic and continue to influence recovery since the first lockdown in early 2020.

The first is the large size of the Mahoran informal economy. The 'informal economy' encompasses all unregistered and unregulated economic activities, from street services (e.g. food vendors, barber shops) to the use of undeclared employees in the construction sector to the operation of numerous unregistered small – often family – businesses. A 2018 study by the French statistical agency INSEE (*Institut national de la statistique et des études économiques*) based on 2015 data found that two-thirds of Mahoran enterprises were informal in nature. Unregistered businesses were estimated to account for a quarter of all retail businesses in Mayotte. However, informal businesses contributed only 9% of the economic value of all companies (excluding financial companies and agriculture).¹² This percentage varied between specific economic activities and also between communes in Mayotte. In general, the informal economy is more prominent in the peripheral north and south of the main island, away from the main economic centres of Mamoudzou and Dzaoudzi (Figure 6).

The consequence of this is that an understanding of Mayotte's economy based on official statistics should be seen as a partial picture, with a 'hidden' informal economy operating in parallel, albeit accounting for a much smaller proportion of total economic output.

⁹ Eurostat regional yearbook, 2021 edition. Available at: <https://ec.europa.eu/eurostat/documents/3217494/13389103/KS-HA-21%E2%80%91001-EN-N.pdf/1358b0d3-a9fe-2869-53a0-37b59b413ddd?t=1631182690503>

¹⁰ Comptes Économiques Rapides pour l'Outre-mer (CEROM). 2020. Nouvelle évaluation de l'impact économique de la crise sanitaire à Mayotte. Available at: https://www.cerom-outremer.fr/IMG/pdf/note_cerom_mayotte.pdf

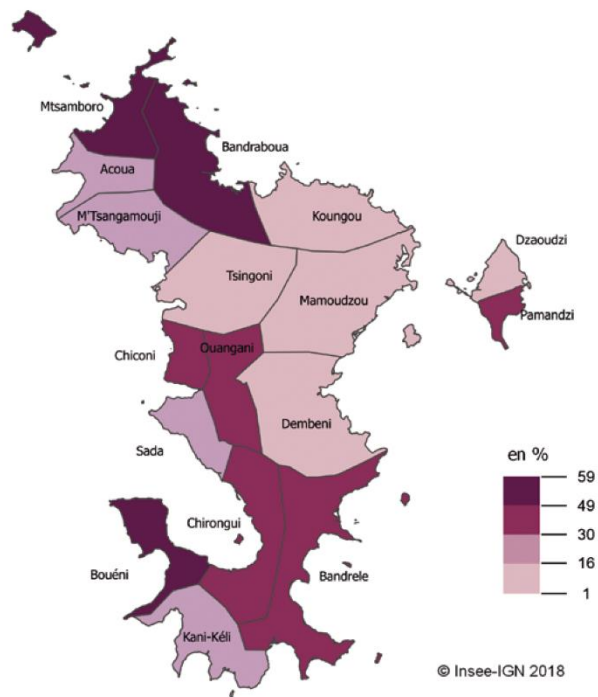
¹¹ *Ibid.*

¹² Daubrée, S. (2018) Enquête sur les entreprises mahoraises en 2015. De nombreuses entreprises informelles pour peu de richesse créée. Epsilon.insee.fr. Available at: <http://www.epsilon.insee.fr/jspui/handle/1/70854>

The second feature is Mayotte's dependence on the public sector, i.e. non-market services such as education, public administration, and healthcare. According to interviewees, the size of the public sector in the formal Mahoran economy partly explains its resilience to the first COVID-19 wave in March-June 2020. The public sector accounts for a significant proportion of economic activity, estimated at 51.4% of GVA (Gross Value Added) in 2017.¹³ This contribution partly cushioned the overall impact on the economy compared to metropolitan France, given that the salaries of public sector employees – and associated private sector contractors – were protected.¹⁴ In contrast, the pandemic affected the private sectors such as recreation, accommodation, tourism (hotels), and transport more significantly..

The third feature is the prominence of small- and micro-enterprises (employing fewer than 10 people) in Mayotte's economy, both formal and informal. 95% of companies have fewer than five employees.¹⁵ Whilst this is not a characteristic unique to Mayotte, micro-enterprises can be more vulnerable to shock events such as COVID-19 and the revenue disruption caused, due in part to their more limited stock and financial reserves compared to large firms. The BGE (*Boutique de Gestion*), which surveyed 132 Mahoran businesses in spring 2020, found that 68% of companies had to close doors since the introduction of lockdown restrictions (March 2020). At the time of the survey, 54% declared that they were in financial difficulties due to restrictions. These figures are similar to those of the survey conducted by the CCI (*Chambre de Commerce et d'Industrie de Mayotte - Chamber of Commerce and Industry of Mayotte*) in April 2020. Of the 621 companies that responded, 62% had had to close down because of the confinement. More than half had suffered a loss of turnover of more than 70%.¹⁶

Figure 6: Estimated economic contribution to GVA from the informal economy in Mayotte, by commune, 2018



Source: INSEE

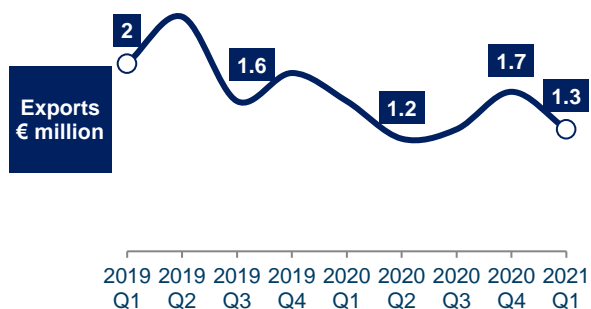
¹³ Institut d'Émission des Départements d'Outre-Mer (IEDOM) (2018) Rapport annuel 2017 de l'IEDOM - MAYOTTE. Available at: <https://www.iedom.fr/mayotte/publications/rapports-annuels/rapports-d-activite/article/rapport-annuel-2017-de-l-iedom-mayotte>

¹⁴ Association des CCI des Outre-Mer, 2020. Outre-Mer: l'Etat d'Urgence. Available at: <https://www.guyane.cci.fr/wp-content/uploads/2021/02/OUTRE-MER-L%C3%89TAT-DURGENCE.pdf>

¹⁵ Orange.re. 2018. Une convention pour promouvoir l'entrepreneuriat au féminin. [online] Available at: <https://mayotte.orange.fr/actu/mayotte/une-convention-pour-promouvoir-l-entrepreneuriat-au-feminin.html>

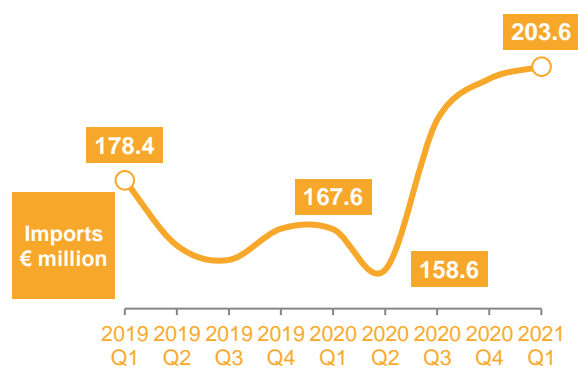
¹⁶ Institut d'Émission des Départements d'Outre-Mer (IEDOM), 2020. L'impact économique immédiat de la crise sanitaire liée au COVID-19 à Mayotte. [online] IEDOM. Available at: <https://www.iedom.fr/mayotte/actualites/la-lettre-de-l-iedom/juillet-2020/actualites-economiques-locales/article/l-impact-economique-immediat-de-la-crise-sanitaire-liee-au-covid-19-a-mayotte>

Figure 7: Exports (€ million), 2019-2021



Source: Ecorys based on CEROM data

Figure 8: Imports (€ million) 2019-2021



Source: Ecorys based on CEROM data

The fourth defining feature is Mayotte's low endogenous productivity in terms of goods and commodities. The agricultural and industrial production base is relatively small and generally subsistence-oriented, meaning that revenue generation from exports is modest. In 2020, Mayotte's main exports by value were tobacco products and maritime vessels. However, export revenue is small compared to expenditure on imports. As a result, the trade deficit was €73 million in Q4 2020 (Figures 7 and 8). Exports decreased by 43% in Q2 2020, in comparison with Q2 2019.

This dynamic is not unusual for small island economies. Mayotte's main imports are fuels and food, cooking and refining products, and meat products, followed by grain processing products and starch products.¹⁷ According to local stakeholders, long supply chains, Mayotte's relative geographical isolation, and the suppression of imports in Q1-Q2 2020 led to disruption in the supply of basic necessities such as bottled water and food. As air and maritime transport were disrupted by COVID-19, imports fell during the first two quarters of 2020. During the first lockdown, an aerial bridge was put in place with Réunion using military aircraft. The economy of Mayotte is heavily dependent on financial support from mainland France. However, Mayotte's trade deficit – and associated fiscal deficit – is further entrenched by the absence of a highly skilled workforce, which might otherwise generate economic value through high value-added professional services such as finance, legal, or IT services.

SECTORAL ANALYSIS

The sectors most affected by the first wave of the COVID-19 pandemic (March to May 2020) in terms of impact on economic productivity were construction, accommodation, and catering (including restaurants and tourism-oriented businesses), air and maritime transport, retail, and business services. Table 1 shows the results of a CEROM study estimating the impact of the COVID-19 pandemic on Mayotte until June 2020. The table presents economic losses for nine key economic sectors in Mayotte, as well as the percentage point contribution to GDP. This information is presented for two periods: from March to May 2020, including the most restrictive measures, and in June 2020, after the relaxation of restrictions. This underlines how these measures impacted the economic activity of Mayotte.

¹⁷ Direction Générale des Douanes et des Droits Indirects. 2021. Le Chiffre du commerce extérieur - Données Régionales. Available at: https://lekiosque.finances.gouv.fr/site_fr/regions/data_region_special.asp?lreq=249E

Table 1: Estimated economic loss for key economic sectors in Mayotte, 2020

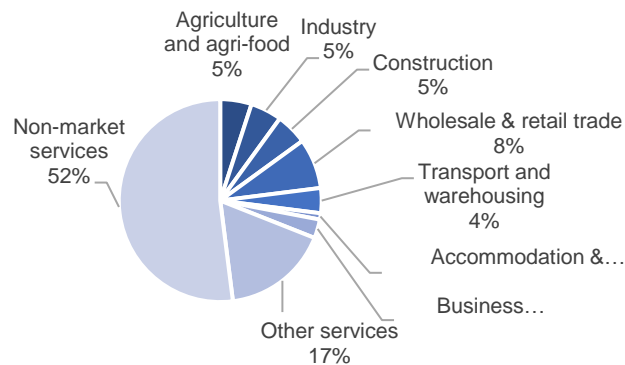
| Sector | During lockdown (March-May 2020) | | June 2020 | |
|-------------------------------|----------------------------------|----------------------------------|-------------------|----------------------------------|
| | Economic loss (%) | Contribution to GDP (GDP points) | Economic loss (%) | Contribution to GDP (GDP points) |
| Agriculture and agri-food | -18 | -1 | -3 | 0 |
| Industry | -37 | -2 | -8 | 0 |
| Construction | -90 | -4 | -31 | -1 |
| Wholesale and retail | -54 | -4 | -16 | -1 |
| Transport | -59 | -2 | -27 | -1 |
| Accommodation and restaurants | -90 | -2 | -60 | 0 |
| Business services | -51 | -2 | -14 | 0 |
| Other services | -3 | -1 | -2 | 0 |
| Non-market services | -14 | -1 | -2 | -1 |
| Total | -18 | -18 | -7 | -7 |

Source: Ecorys based on CEROM data

Note: Economic loss is calculated as the change of Gross Value Added of the nine sectors. The change in GVA was multiplied by the share of GDP to estimate the sectoral contribution to the GDP loss.

As noted, the substantial contribution of non-market services (i.e. the public sector) to Mayotte's economy acts as a 'buffer' against the overall negative economic impacts of COVID-19. Following the public sector, 'other services' contribute 17% of GVA, wholesale and retail contribute 8%, and construction and agriculture 5% each (Figure 9). An April 2020 survey of 621 Mahoran businesses by the Chamber of Commerce and Industry (CCI) found that 96% of businesses were adversely affected by COVID-19 restrictions, with the effects most widely felt in the accommodation and catering industries (100%).

Figure 9: GVA contribution by sector, Mayotte, 2018



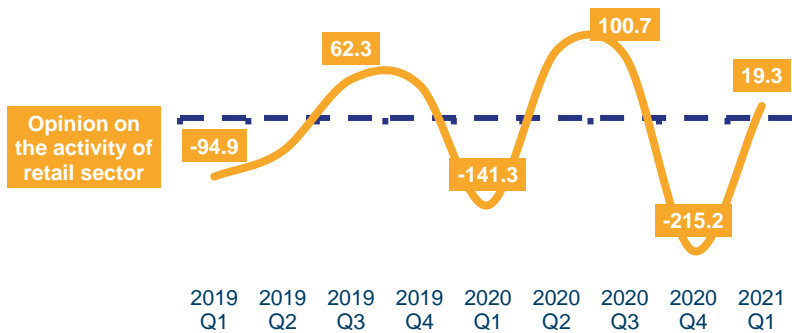
Source: Ecorys based on INSEE data

Retail

The formal economy retail sector was hard-hit by the first COVID-19 wave, experiencing a 54% drop in activity during the first lockdown period (March-May 2020) compared to the counterfactual no-COVID-19 (i.e. 'business as usual') scenario, which contributed almost a quarter of the total economic downturn. Confidence recovered quickly after the relaxation of first wave measures, exhibiting a strong degree of economic resilience (i.e. the ability to return to stability) in 2020 (Figure 10).¹⁸ Many Mahoran retail businesses operate in the informal economy and thus are not reflected in the data.

¹⁸ Cherchem, O. and Rageot, F., 2020. L'impact économique immédiat de la crise sanitaire liée au COVID-19 à Mayotte. Available at: <http://www.epsilon.insee.fr:80/jspui/handle/1/129606>

Figure 10: Opinion on retail sector activity, Mayotte*



* The measure shows the difference between the positive and negative opinions. A negative value indicates that sentiment is generally negative. The dotted blue line indicates no net positive/negative opinion (i.e. a neutral opinion)

Source: Ecorys based on CEROM data

may be more substantial than in 2020, and are yet to become fully evident.

Food retailers were not reported to have experienced significant financial difficulties. However, interview evidence indicates that 'non-essential' retailers (e.g. shops selling luxury goods) were more negatively affected, as were shops with food sales as a secondary income. During the second COVID-19 lockdown (February to March 2021), to prevent additional delays to the construction sector, some construction sector suppliers such as hardware stores were permitted to remain partially open. The impacts of the early 2021 COVID-19 wave

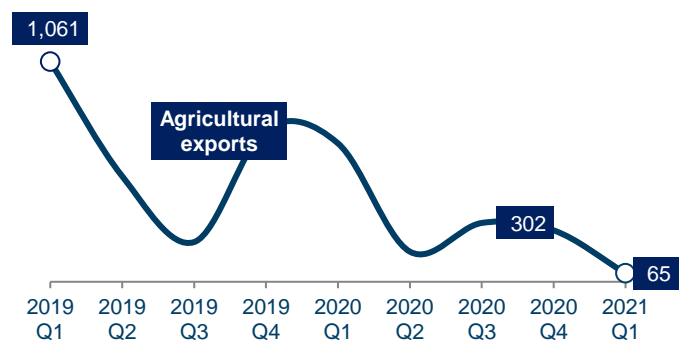
Construction

Subjected to a complete halt on construction activity, the Mahoran construction sector experienced a 90% drop in economic productivity from March-May 2020 compared to the counterfactual no-COVID-19 (i.e. 'business as usual') scenario, contributing almost a quarter to the economy-wide drop of 18%.¹⁹ However, by June 2020, activity had picked up sharply (though still 31% below usual).²⁰ The rebound in construction activity, despite long contractual lead-in times in the sector, may be explained by the fact that ongoing projects were able to quickly resume from where they had suspended work, after restrictions were lifted.

Agriculture (including fishing)

The impact of the crisis on the productivity of the agriculture and fishing sectors was more limited than retail or construction, suffering a reduction of 18% GDP from 2019 to 2020.²¹ Primary – often subsistence – industries, terrestrial agriculture and fishing do not rely as heavily on upstream supply chains, meaning that production was able to resume. Conversely, the challenge for agricultural enterprises in Mayotte lay in the downstream disruption caused by COVID-19, i.e. shipping to overseas markets. Agricultural exports from Mayotte dropped sharply in Q2 2020, but it is of note that the same was true in 2019, and

Figure 11: Agricultural exports (€ thousands), 2019-2021



Source: Ecorys based on CEROM data

¹⁹ Cherchem, O. and Rageot, F., 2020. L'impact économique immédiat de la crise sanitaire liée au COVID-19 à Mayotte. Available at: <http://www.epsilon.insee.fr:80/jspui/handle/1/129606>

²⁰ Ibid.

²¹ CEROM (September 2020) Nouvelle évaluation de l'impact économique de la crise sanitaire à Mayotte. Available at: https://www.cerom-outremer.fr/IMG/pdf/note_cerom_mayotte.pdf

this is largely due to seasonal variation (Figure 11). Island businesses proved to be adaptive. For instance, local farmers redirected their production towards school meals.²²

Accommodation and restaurants

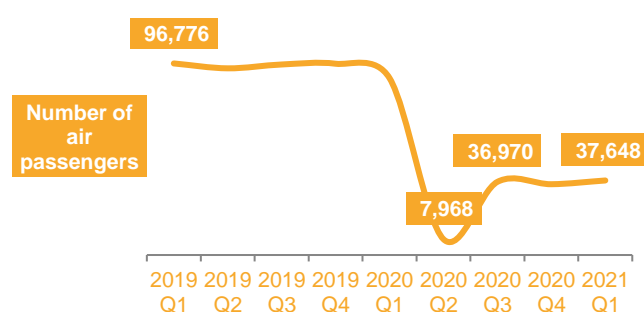
Along with transport, accommodation (hotels) and restaurants are Mayotte's main tourism-oriented sectors. Historically, Mayotte's tourism industry has been underdeveloped. Hotels and restaurants employ relatively few people and are estimated to only contribute 1% of the GVA. 61,800 tourists visited Mayotte in 2017, compared to more than 500,000 tourists visiting Réunion the same year.²³ However, visitor numbers had been steadily increasing in the five years prior to the COVID-19 pandemic, and niche tourism is seen as an important strategic future growth sector.²⁴

The relatively small size of the hotel sector meant that, due to the high number of civil servants and police officers deployed on the island/in mission, hotels coped well with the COVID-19 crisis. However, bed and breakfast establishments, holiday rental businesses, and restaurants were forced to close entirely to respect the measures. The accommodation and catering sector experienced a 90% loss in economic productivity during the first COVID-19 lockdown due to the cessation of activity and air transport and a 60% loss in June 2020 (Table 2).

Transport

Mayotte's transport sector – both aviation and maritime transport – was significantly affected during the first lockdown period (March-May 2020). Transport sector productivity fell by 59% in Mayotte over the March-May 2020 containment period.²⁵ Air passenger numbers dropped sharply from 89,330 in Q1 to 7,968 in Q2 2020 (Figure 12). Six flight operators fly to Mayotte's Dzaoudzi–Pamandzi International Airport, with two – Air Austral and Corsair International – operating connections to Paris. One airline is based in Mayotte: EWA Air, a subsidiary of Air Austral Group. All airlines had to reduce their frequency of flights or cancel flights, which has depressed turnover. For example, Air Austral, which had about 1,100 employees, had to reduce its staff by 15-20% based on voluntary leave plans.

Figure 12: Air passengers, Mayotte, 2019-2021



Source: Ecorys based on CEROM data

Similarly, the volume of maritime transport (shipping) was reduced. This was partly due to disruption in overseas supply chains but affected both passengers and freight. The day-to-day operation of the commercial port of Longoni was disrupted, which had a domino effect on the maritime transport sector in Mayotte. Indeed, the Ida Nel company, which manages the port, had to adapt its opening hours during the period of confinement (operating only for half days). As a result, it became increasingly difficult for customers and forwarders to complete the administrative formalities required get ship containers on time. Furthermore, staffing levels were reduced.²⁶

²² Information from stakeholder interviews

²³ Institut d'Émission des Départements d'Outre-Mer (IEDOM) (2018) Rapport annuel 2017 de l'IEDOM - MAYOTTE. Available at: <https://www.iedom.fr/mayotte/publications/rapports-annuels/rapports-d-activite/article/rapport-annuel-2017-de-l-iedom-mayotte>

²⁴ Institut d'Émission des Départements d'Outre-Mer (IEDOM) (2018) Rapport annuel 2017 de l'IEDOM - MAYOTTE. Available at: <https://www.iedom.fr/mayotte/publications/rapports-annuels/rapports-d-activite/article/rapport-annuel-2017-de-l-iedom-mayotte>

²⁵ Observatoire économique de Mayotte (2020) Plan de relance économique pour Mayotte - Plan de continuité et de reprises des activités économiques. Available at: <https://www.adim-mayotte.fr/uploads//ADIM-Plan-Relance2020-OK%20A4.pdf>

²⁶ Mayotte Hebdo (2020) La crise du Covid n'a pas arrangé les affaires du port de Mayotte. Available at: <https://www.mayottehebdo.com/actualite/economie/la-crise-du-covid-n-a-pas-arrange-les-affaires-du-port-de-mayotte>

3. SOCIAL IMPACT OF THE COVID-19 CRISIS

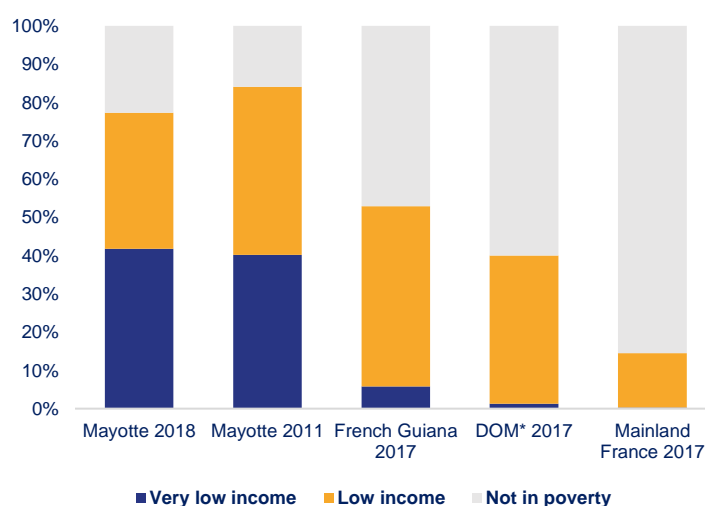
The COVID-19 pandemic has had a significant social impact in Mayotte, acting to widen entrenched social inequality and to broaden the disparities between unregistered migrants and registered citizens. It has also indirectly exacerbated irregular migration and disrupted education.

As with the economic impact, Mayotte's pre-existing social characteristics have both shaped and been shaped by the COVID-19 pandemic. Mayotte has a number of ongoing social challenges relating to migration, poverty, income disparity, unemployment, and education. These characteristics are intrinsically linked to the geography and infrastructure of Mayotte.

Migration, poverty, and income disparity

As France's least prosperous *département*, 77% of the Mahoran population lived below the national poverty line in 2018 (Figure 13).²⁷ In comparison, the poverty rate was 53% in French Guiana, the least prosperous French outermost region after Mayotte (2017). Poverty and social deprivation in Mayotte are related to determinants such as high epidemiological risks in unsanitary conditions in tropical weather and the quality of infrastructure. Issues relating to the latter include the inefficient collection and treatment of waste, and poor quality housing infrastructure. Social deprivation makes the suppression of COVID-19 more challenging in Mayotte.

Figure 13: Poverty incidence; Mayotte and other territories



*DOM = *département d'outre-mer*
Source: Ecorvs based on INSEE data

The fact that it is a French *département* in the Mozambique Channel - wealthy in comparison to some surrounding African states – makes Mayotte an attractive destination for many citizens of the Union of the Comoros, who make up a sizeable proportion of Mayotte's undeclared population. Mayotte is seen as a potential entry point to the EU, both for asylum seekers and economic migrants, many of whom do not speak French.²⁸ This has elicited protests by residents over the years. The arrival of many pregnant women has also led to a dramatically higher birth rate of 40 births per 1,000 people, compared to 12.5 per 1,000 in mainland France.²⁹ This means that the demography of Mayotte is also heavily skewed towards young people; half of the inhabitants are under 18 years of age (and are more likely to be asymptomatic COVID-19 carriers). Since the onset of the COVID-19 pandemic, migration has risen

²⁷ Merceron, S. (2018) Les inégalités de niveau de vie se sont creusées - Insee Analyses Mayotte - 25. Available at: <https://www.insee.fr/fr/statistiques/4622454>

²⁸ France 24. 2019. Focus - Europe via the Indian Ocean? New wave of illegal immigration hits France's Mayotte. [online] Available at: <<https://www.france24.com/en/20191022-europe-via-the-indian-ocean-new-wave-of-illegal-immigration-hits-france-s-mayotte>>.

²⁹ Cour des comptes. 2020. Centre hospitalier de Mayotte (CHM) - Exercices 2015 et suivants. Available at: <https://www.ccomptes.fr/fr/publications/centre-hospitalier-de-mayotte-chm-exercices-2015-et-suivants>

further. On 11 February 2021, the French government announced that it also deployed three patrol boats to combat irregular migration.³⁰

The distribution of wealth within Mahoran society is polarised. The COVID-19 pandemic has further widened Mayotte's income disparity between those in the informal economy – often irregular or unregistered migrants – and the formal parts of the economy, who are more often registered citizens. As noted by one interviewee, Mayotte can be seen to have two separate societies; one formal, overseen by France via the regional administration; and another informal.

The registered population of Mayotte, often employed in the public sector, had generally continued to receive income as from March 2020, when COVID-19 measures were first introduced, either through daily work (for the regional administration) or welfare payments from the State. The unregistered population – often operating in the informal economy – has been more exposed to the economic impacts of COVID. Local interview evidence indicates that this hardship has led to rising crime. Local interviewees indicate that individuals have been forced to commit theft in order to be able to eat, despite associations and volunteers mobilising to distribute food aid and food vouchers. Limited access to clean drinking water has also made it more difficult for residents to adhere to social distancing protocols, as they have sometimes found it necessary to travel further for clean drinking water (e.g. where local shops have run out of water to sell).

Therefore, due to a variety of interconnected factors, COVID-19 has deepened social divisions and economic polarisation in Mayotte. On 25 January 2021, the French Minister of Overseas Territories deployed two additional platoons of *gendarmes* in response to heightened crime in late January 2021. Social divisions were reportedly made worse by tensions with immigrants from Anjouan, an island in the Comoros.³¹ Additional police officers were dispatched in March.³² Recorded crime in Mayotte increased by 5.6% from 2019 to 2020, and was particularly driven by robbery-related physical violence, which increased by approximately 50%.³³ There were 10 reported murders in 2020, compared to 8 in 2019.

Unemployment and education

Mayotte struggles with long-term structural unemployment, with an official unemployment level of 27.6% (in 2020), as shown in the infographic at the beginning of this fiche, compared to 7.8% in France.³⁴ This represents overall improvement since 2019, when the unemployment rate in Mayotte was 29.8%. However, when factoring in the number of undocumented residents working in the informal economy, the official percentages for all years are likely to be underestimates. The primary cause for regional unemployment is a long-term lack of employment opportunities in Mayotte. Evidence from local stakeholders interviewed indicates that each year up to 5,000 (mostly young) people are in search of employment in Mayotte, but the entire economy can only offer approximately 1,500 job vacancies (i.e. advertised jobs) annually.³⁵ The 2020 youth unemployment rate was 55.4%, compared to 20.2% in mainland France and an EU average of 16.8%. The long-term unemployment rates have likely³⁶ decreased as compared to

³⁰ interieur.gouv.fr (2021) Gérald Darmanin et Sébastien Lecornu annoncent le renforcement du dispositif sécuritaire à Mayotte et au large de ses frontières. Available at: <https://www.interieur.gouv.fr/Le-ministre/Communiqués-du-ministre/Gerald-Darmanin-et-Sebastien-Lecornu-annoncent-le-renforcement-du-dispositif-securitaire-a-Mayotte-et-au-large-de-ses-frontieres>

³¹ The Limited Times (25 January 2021) Mayotte: three people killed with knives, including two teenagers. Available at: https://newsrmd.com/tech/2021-01-25-%0A---mayotte--three-people-killed-with-knives--including-two-teenagers%0A--S1eTvD_31u.html

³² Imazpress (February 2021) Mayotte : 20 nouveaux policiers déployés d'ici à mars, 11 February 2021. Available at: <https://www.ipreunion.com/outr-mer/reportage/2021/02/11/dispositif-securitaire-a-mayotte-20-nouveaux-policiers-deployes-d-ici-a-mars.130909.html>

³³ franceinfo (2021) Délinquance: les vols avec violence explosent, 26/02/2021. Available at: <https://la1ere.francetvinfo.fr/mayotte/delinquance-les-vols-avec-violence-explosent-945130.html>

³⁴ Eurostat (2019) Working age (15-74 years) population employment statistics; LFST_R_LFU3RT.

³⁵ Interview with the Chambre de Commerce et d'Industrie de Mayotte (CCI)

³⁶ Eurostat marks these numbers as “low reliability” for Mayotte.

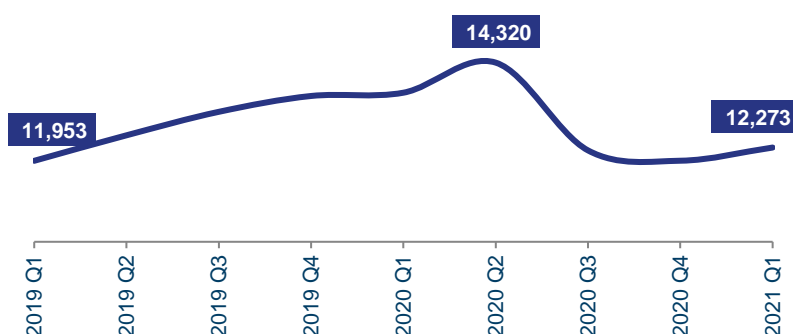
2019, reaching 23.4% in 2020, which is however consistently higher than the national average (3%) and the EU27 average (2.5%).³⁷

This scarcity is further exacerbated by a skills mismatch and the low educational attainment of many residents, which has a direct correlation with poverty. The poverty rate is 92% for households where the main earner is not qualified to secondary (diploma) level.³⁸ This makes it more challenging for individuals to afford enrolment fees for tertiary education, even though Mayotte has a university; the *Centre universitaire de Mayotte* (the University Centre of Mayotte). Mahoran employers can struggle to fill intermediate and highly skilled job vacancies, such as in the engineering or maritime industry, where secondary diploma-level qualifications (or higher) are necessary. At the same time, many younger people choose to leave Mayotte to move to mainland France in search of employment.³⁹ Job vacancies can often be advertised for 2-3 months in a row without being suitably filled, a clear indication of an under-skilled labour market. The onset of the first COVID-19 wave in early 2020 meant that some employees were laid off, particularly in the accommodation and catering sector. 29% of businesses surveyed by the Mayotte Chamber of Commerce and Industry in March-April 2020 indicated that employees had been made redundant or had reduced working hours.

The number of end-of-the-month registered jobseekers in Mayotte increased steadily over 2019, but peaked at 14,320 in Q2 2020. In Q3 2020, with the resumption of some economic activity, the number of registered jobseekers decreased somewhat, but this positive trend did not continue over the rest of the year, as economic performance remained limited (Figure 14).

The State has introduced various measures to support businesses to cope with this crisis, such as 'short-time working', state-guaranteed loans, a solidarity fund for small businesses, etc. For the private sector, these state measures have been of some help in buffering against unemployment. Employers have used the short-time working scheme to reduce their workforce; 9,900 employees belonging to 1,100 companies were affected in

Figure 14: Jobseekers registered at the end of each month at Pôle emploi, Mayotte, Q1 2019 – Q1 2021



Source: Ecorys based on Pôle emploi

Mayotte on 28 April 2020. The short-time working scheme aims to keep redundancies to a minimum. However, as previously noted, such support schemes are of no assistance to unregistered informal economy businesses.

By sector, unemployment welfare claims were the highest in construction and retail during the first COVID-19 wave (March-May 2020) lockdown (Table 2). Following the relaxation of strict measures, claims persisted in the transport and accommodation sectors. This was most likely because of ongoing social distancing measures in restaurants, coupled with the ongoing reduction in tourists and travellers (transport and accommodation).

³⁷ 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.

³⁸ Merceron, S. (2018) Les inégalités de niveau de vie se sont creusées - Insee Analyses Mayotte - 25. Available at: <https://www.insee.fr/fr/statistiques/4622454>

³⁹ INSEE (2021) People from the Antilles, French Guiana and Mayotte commonly leave the region of their birth, unlike those from Réunion. Available at: <https://www.insee.fr/en/statistiques/5412233>

Table 2: Partial unemployment welfare claims by sector (March 2020-April 2021)

| | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Apr |
|---------------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|------------|------------|------------|------------|--------------|--------------|------------|
| Agriculture and agri-food | 210 | 355 | 330 | 230 | 150 | 130 | 45 | 25 | 15 | 15 | 25 | 65 | 35 | 0 |
| Industry | 385 | 380 | 250 | 60 | 40 | 20 | 15 | 10 | 0 | 0 | 0 | 40 | 30 | 0 |
| Construction | 1900 | 2400 | 1405 | 545 | 330 | 235 | 210 | 115 | 70 | 35 | 50 | 120 | 110 | 20 |
| Wholesale and retail | 995 | 1385 | 1040 | 260 | 125 | 70 | 40 | 25 | 20 | 20 | 35 | 350 | 295 | 0 |
| Transport | 560 | 825 | 810 | 510 | 425 | 365 | 330 | 315 | 300 | 255 | 165 | 405 | 355 | 0 |
| Accommodation and food | 660 | 790 | 800 | 600 | 430 | 335 | 335 | 235 | 225 | 215 | 315 | 515 | 440 | 120 |
| Services to enterprises | 815 | 1140 | 990 | 540 | 270 | 225 | 160 | 130 | 115 | 80 | 80 | 425 | 285 | 15 |
| Other services | 385 | 490 | 385 | 120 | 65 | 30 | 75 | 0 | 0 | 0 | 0 | 50 | 40 | 0 |
| Non-market services | 725 | 1250 | 990 | 390 | 275 | 135 | 80 | 35 | 25 | 20 | 25 | 465 | 325 | 10 |
| Total | 6,635 | 9,015 | 7,000 | 3,255 | 2,110 | 1,545 | 1,290 | 890 | 770 | 640 | 695 | 2,435 | 1,915 | 165 |

Source: Ecorys, based on Dares data

COVID-19 has also had a disruptive effect on school-age education in Mayotte, through school closures. Schools in Mayotte were closed from March-May 2020, and again on 6 February 2021 for a period of 5 weeks. This poses a potential long-term risk in Mayotte, given that school dropout rates are high – reportedly between 15-25%.^{40 41} The challenge remains to ensure that young people re-engage with full-time education when restrictions are lifted.

4. POLICY RESPONSES TO TACKLE THE EFFECTS OF THE CRISIS

OVERVIEW

As already described, Mayotte is France's least prosperous outermost region, with a substantially low GDP per capita and significantly high levels of poverty and unemployment.⁴² Although the first wave of the pandemic did not hit Mayotte as hard as mainland France, the second wave – abating as of July 2021 – is expected to result in a significantly larger and longer-term economic and social impact. The region is already facing major challenges caused by COVID-19. Consequently, EU, national and regional funds were mobilised to help the local situation.

The EU has mobilised a number of tools and funding sources to help Mayotte 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 unused existing resources, and their redirection to where they were most needed. Furthermore, the Recovery Assistance for Cohesion and the Territories of Europe (REACT-EU) package allocated over €105 million to Mayotte - €85 million from the European Regional Development Fund and €20 million from the European Social Fund - to repair the damage caused by the pandemic in the region and to initiate a digital and resilient economic and ecological recovery.

The EU Recovery and Resilience Facility (RRF) is a key tool to support recovery. In this context, France developed the RRP (*Plan National de Relance et de Résilience* - the National Recovery and Resilience Plan 2021-2026), which lays out nine investment priorities intended to guide recovery over the medium term.⁴³ In June 2021 the European

⁴⁰ Statistical data on the impacts of COVID-19 on education in Mayotte are not available.

⁴¹ L'Express (22 April 2020) COVID-19: in Overseas France, a much higher school dropout rate than in metropolitan France. Available at: https://www.lexpress.fr/actualite/societe/covid-19-en-outre-mer-un-taux-de-decrochage-scolaire-bien-plus-eleve-que-en-metropole_2124338.html

⁴² In 2019, Mayotte ranked near the bottom on the list of NUTS-2 regions with a regional GDP (in million PPS) of 2,426, below all other ORs.

⁴³ 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

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, at the national level, the *France Relance* plan, worth €100 billion, includes €1.5 billion for overseas territories. It is the largest national plan in the European Union in proportion to national GDP. As of May 2021, €269 million has been sent to Mayotte as part of the France Relance plan to support both economic and social measures against the unprecedented health ordeal.

MEASURES IN SUPPORT OF THE ECONOMY

The EU has supported Mayotte through the Coronavirus Response Investment Initiative (CRII) and Coronavirus Response Investment Initiative Plus (CRII+) initiatives by increasing fund allocations through the European Regional Development Fund (ERDF) and the European Social Fund (ESF) to support enterprises, mostly in the domain of energy efficiency.⁴⁴ Several economic measures were also introduced at the national and regional levels. At the national level, the following measures were implemented:

- **Fonds National de Solidarité:** This fund has provided financial support for France's (including Mayotte) SMEs, self-employed workers and micro-entrepreneurs from all sectors that have been particularly affected by the economic consequences of the COVID-19 crisis. This aid is given out as a direct monthly payment of €1,500 per firm. Businesses which have experienced a reduction in turnover of more than 80% between 15 March and 15 April compared to the same period in 2019 are eligible for support under this first component. As of November 2020, 20,132 applicants in Mayotte benefitted from the fund, totalling €32.4 million.⁴⁵ The second component of the fund targets hotels, cafes, and companies involved in catering, tourism, events, sport, culture, and related activities. Businesses that have suffered a very sharp drop in activity could receive increased support from the government. Those with up to 20 employees and with a turnover of up to €2 million are eligible. The financial support paid under the second phase can be up to €15,000. In total, the two phases have paid out around €103.6 million to 6,198 companies in Mayotte under the Fonds National de Solidarité.⁴⁶
- **Deferral of tax and social contribution payments:** The French government has given companies the possibility to defer tax and other social charges. Businesses can ask for a discount or deferral of their tax payments without a penalty on the settlement of their next direct tax deadline. Companies could also postpone employee contributions partially or entirely without a penalty. In total, €35.9 million worth of social contribution deferrals benefitted 579 companies, while 36 businesses have been granted tax payment deferrals, worth €1.7 million in Mayotte.⁴⁷
- The French government has also supported **vocational training** for 72 companies, benefiting 518 employees placed in partial activity to invest in skills and prepare for the recovery, an investment worth €342,600.

Meanwhile, the regional government also introduced Mayotte-specific measures to similarly support the economy. These included:

- **La Cellule d'Urgence:** In cooperation with the national government, the Chamber of Commerce and Industry (CCI) created an emergency unit initially in 2018 following a local social crisis. The unit was activated on the day of the first lockdown in 2020 with the aim to inform companies in difficulty about aid measures in place by the State, banks, and the region in the face of the pandemic, as well as to measure

⁴⁴ 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/>

⁴⁵ Plan de Relance Économique pour Mayotte. Available at: <https://www.adim-mayotte.fr/uploads//ADIM-Plan-Relance2020-OK%20A4.pdf>

⁴⁶ Mesures de soutien aux entreprises. Available at: <https://www.mayotte.gouv.fr/Politiques-publiques/Sante/CORONAVIRUS-COVID-19/Mesures-de-soutien-aux-entreprises/Mesures-de-soutien-aux-entreprises>

⁴⁷ L'État soutient les entreprises mahoraises. Available at: <https://www.mayotte.gouv.fr/Politiques-publiques/Sante/CORONAVIRUS-COVID-19/Mesures-de-soutien-aux-entreprises/L-Etat-soutient-les-entreprises-mahoraises>

the impact of the crisis on the local entrepreneurial setting. It consists of 10 advisers from the Mahoran CCI who were mobilised on a full-time basis. The unit will be in place until June 2021.⁴⁸ The unit supports companies mainly by granting *Prêt d'honneur* (see next point).

- **Prêt d'honneur:** The regional government also created loans granted mainly by the *Cellule d'Urgence*. This loan scheme aims to financially support local SMEs and micro-enterprises struggling with liquidity issues due to the measures used to combat the COVID-19 pandemic. This support measure consists of zero-interest loans, with a maximum value of €50,000 and a maximum payback period of 10 years.⁴⁹ In total, 113 loans have been granted, amounting to €3.1 million.
- **Fonds de Soutien Régional:** A regional support fund was also put in place for micro-enterprises, self-employed individuals, and microentrepreneurs with an annual turnover of less than €1 million. Businesses with a maximum of 10 employees whose activity was directly impacted by the pandemic could benefit from the aid of €1,000. As part of this regional fund, 1,767 payments have been made to companies.⁵⁰
- **Douka 2.0:** The Douka 2.0 project was launched by the CCI to stimulate consumption and maintain economic activity for 250 'doukas' (the name for very small local businesses/grocery shops) by supporting their modernisation and digitalisation.⁵¹

LABOUR/SOCIAL SECTOR MEASURES

As described in the previous section, the impact of the pandemic on Mayotte's social structure has been dramatic. The numerous challenges it was already facing pre-pandemic, related to its high unemployment, skills mismatch, and overall poverty, were only exacerbated in 2020.

At the EU level, the REACT-EU package includes €20 million from the European Social Fund (ESF). Its actions will focus on individualised or intensive support actions for vulnerable groups towards employment, setting up or taking over a business, and on the development of human skills. In particular, the actions will focus on accompanying the investment efforts made in the context of the recovery and the ecological and digital transitions and on identifying and setting up a pathway for those most vulnerable to the impact of the health crisis.

At the national level, the following measures have been provided to tackle youth unemployment and provide community support:

- The national incentive scheme **1 Jeune 1 Solution** was established to support youth employment. This measure provides private-sector incentives in the form of €4,000 grants to companies hiring young people, or offering apprenticeships. This measure also delivers training courses for young people. More than 426 young Mahorans have benefitted from the *1 Jeune, 1 Solution* plan. In 2020, 68 hiring bonuses worth €4,000 were paid out, there were 100 apprenticeship contracts, and 258 subsidised jobs were financed by the France Relance plan.
- The **Activité Partielle** measure was launched at a national level and allowed companies, which were faced with a lasting reduction in their economic activities, to temporarily reduce the working hours of their employees. Whilst working hours are reduced, employers will receive an allowance for the hours not worked. This allowance equals to at most 70% of the wages paid to the employees placed under long-term partial employment. As of March 2021, three million hours were compensated for through the scheme, for a total amount of €25 million, benefitting 17,406 employees in Mayotte.⁵²
- €12 million for community support, including €6.1 million to fund investments by local municipalities.

⁴⁸ PLAN DE RELANCE ÉCONOMIQUE POUR MAYOTTE. Available at: <https://www.adim-mayotte.fr/uploads//ADIM-Plan-Relance2020-OK%20A4.pdf>

⁴⁹ Règlement Prêt d'Honneur d'Urgence Covid-19. Available at: <https://www.mayotte.cci.fr/content/uploads/2020/04/R%C3%A8glement-Pr%C3%AAt-dhonneur-durgence-Covid-19.pdf>

⁵⁰ PLAN DE RELANCE ÉCONOMIQUE POUR MAYOTTE. Available at: <https://www.adim-mayotte.fr/uploads//ADIM-Plan-Relance2020-OK%20A4.pdf>

⁵¹ Interview with CCI of Mayotte

⁵² Mesures de soutien aux entreprises. Available at: <https://www.mayotte.gouv.fr/Politiques-publiques/Sante/CORONAVIRUS-COVID-19/Mesures-de-soutien-aux-entreprises>

- **Auto entrepreneur status:** This national scheme allows self-employed entrepreneurs to benefit from social rights, access to state aid during crises and contributions for retirement. The scheme was adopted in Mayotte in May 2021, and it is estimated to benefit 10,000 self-employed individuals and 6,000 informal businesses.⁵³ In addition, the micro-social regime of workers will be adapted to the specificities of Mayotte. The rates of social contributions applied to these micro-enterprises will be different from those applicable in metropolitan France. The measure concerns very small enterprises without employees, which were created as of April 1 2020, and whose revenue thresholds are not higher than €176,200 for the sale of goods and €72,500 for service provision activities under industrial and commercial profits, and liberal professionals under non-commercial profits.⁵⁴

Furthermore, the French ministers of Overseas Territories and Solidarity and Health announced additional measures to specifically target the food crisis. As previously indicated, widespread poverty led to a hunger crisis, for which specific measures were implemented to provide food. These included:

- The establishment of emergency support for food aid to help people in need in Mayotte. An amount of €1.6 million was deployed for three months, starting in February 2021, in the form of emergency food checks for approximately 13,300 families in Mayotte. The distribution of these emergency food vouchers is entrusted to Mayotte's region in coordination with local communities and associations present in the territory. On average, families will receive support in the form of €40 per month for these three months.⁵⁵
- More specifically, the French government and the municipality of M'tsamboro signed a partnership agreement relating to the distribution of exceptional food vouchers. The agreement signed with the town halls raised the vouchers' value to €500, allowing the most disadvantaged to benefit from this aid exclusively during the period of confinement.⁵⁶ A similar agreement was also signed for the municipality of Dzaoudzi-Labattoir.⁵⁷

REFLECTIONS ON MEASURES⁵⁸

Similarly to other ORs, it is still difficult to fully assess the effectiveness of the measures. Based on available information and interviews, the majority of the measures were relevant in the context of the challenges that the region faced. The quick mobilisation of the measures in response to the pandemic was appreciated by stakeholders at large. The Partial Activity Scheme particularly helped in minimising redundancies in the region. Generally, measures implemented on the regional, national and EU levels, such as the 'Honour Loans', the PGE loans and the National Solidarity Fund, and REACT-EU were all described as effective in helping many eligible businesses to avoid bankruptcy, and to survive through the crisis.

Given the region's large informal sector, many businesses have been unable to benefit from the support mechanisms implemented by the national and regional governments. Interviewee evidence indicates that beneficiaries of support schemes have not always had the training or the capacity to apply for aid. As a result, unregistered companies and beneficiaries have been left unassisted because they were unable to apply, and some funds have not been fully utilised. Interviewees also mentioned that the formalities associated with the deployment of measures were overly complex in some instances, making them time-consuming for applicants and beneficiaries.

⁵³ Caisse de sécurité sociale de Mayotte (estimation INSEE 2017). Available at : <https://www.cssm.fr/page/auto-entrepreneur>

⁵⁴ Mise en place du statut auto-entrepreneur à Mayotte. Available at: <https://www.mayotte.gouv.fr/Actualites/Actualites/Mise-en-place-du-statut-auto-entrepreneur-a-Mayotte>

⁵⁵ Sébastien Lecornu et Olivier Véran annoncent un soutien de 1,6 million d'euros pour l'aide alimentaire à Mayotte. Available at: <https://outre-mer.gouv.fr/sebastien-lecornu-et-olivier-veran-annoncent-un-soutien-de-1-6-million-deuros-pour-laide-alimentaire>

⁵⁶ Distribution de bons alimentaires | Signature de la convention de partenariat avec M'tsamboro. [online] Available at: <https://www.mayotte.gouv.fr/Politiques-publiques/Sante/CORONAVIRUS-COVID-19/Dispositif-mis-en-place/Distribution-de-bons-alimentaires-Signature-de-la-convention-de-partenariat-avec-M-tsamboro>

⁵⁷ Distribution de bons alimentaires | Signature de la convention de partenariat avec Dzaoudzi-Labattoir. Available at: <https://www.mayotte.gouv.fr/Politiques-publiques/Sante/CORONAVIRUS-COVID-19/Dispositif-mis-en-place/Distribution-de-bons-alimentaires-Signature-de-la-convention-de-partenariat-avec-Dzaoudzi-Labattoir>

⁵⁸ 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.

5. FUTURE PROSPECTS

Mayotte's immediate future prospects for economic and social recovery remain somewhat limited. Longer-term prospects are more positive. The IEDOM Q1 2021 report, published in June 2021, noted renewed optimism among business leaders in Mayotte. In this quarter, the business confidence index increased by 15.9 points to 119.2 points.⁵⁹ In addition, some interviewees consulted for this study expressed optimism regarding the pace of change in late 2021 and beyond. Employment demand also increased in Q1 2021, with a 2.7% increase in registered jobseekers from Q4 2020; though concurrent supply-side figures regarding the numbers of jobs on offer are not available.

Part of this anticipated economic resurgence can be attributed to strong ongoing household consumption and spending. Globally, many countries have seen an accumulation of household savings, which are now driving a resumption in economic activity, and are placing an accompanying strain on supply chains. As noted in Figure 8 of this factsheet, imports to Mayotte grew sharply in Q1 2021. Consumer loans have also grown by +7.4% on a year-on-year basis.⁶⁰

This generally positive outlook is characterised by an uneven situation across industry sectors. The tertiary (services) sector continues to face restrictions as of mid-2021, with measures affecting 'non-essential' businesses. Thus, their ability to 'bounce back' remains somewhat limited. Tourism sector businesses in Mayotte continue to face hardship (despite policy support measures) and will likely continue to do so until tourism to Mayotte resumes. Therefore, recovery in late 2021 and early 2022 is being driven by the construction sector and 'essential' businesses, as well as the public sector. Construction business leaders in Mayotte anticipate a reduction in costs and improved cash flow, though this is tempered somewhat by caution regarding slower payment terms.⁶¹

Mayotte's economic development, whilst currently on a positive trajectory, will depend on a number of conditionalities. These include the continued suppression of COVID-19 infection rates through mass vaccination and limited ongoing control measures, continued support to citizens and businesses in terms of limiting the ongoing negative impacts of the pandemic and promoting recovery, and 'opening up' the terms of resuming commercial flights and tourism, to restart the economy. The latter may be supported by the EU COVID-19 Vaccine Passport, which has been available since 1 July 2021.

Immigration to this outermost region is also an ongoing destabilising factor. Interview evidence indicates that ongoing migration to the region continually expands the informal economy, and undermines attempts by regional and national authorities to stabilise the situation.

Another key variable in Mayotte's future prospects will be the French government's commitment to supporting the region. There have been indications that Mayotte's ongoing socio-economic problems have attracted new political attention; in March 2021, 54 French parliamentarians signed an open letter to the French government calling for action to address severe poverty and irregular immigration.⁶² Attention has also been focused on Mayotte because of the tenth anniversary of its becoming an overseas department of France (since March 2011).

In the medium and long term, the prospects for Mayotte will depend largely on the ability of the regional (and national) administrations to effect lasting and stable economic reforms across key sectors. Interview evidence indicates that it would be helpful to 'formalise' economic activities, by registering inhabitants where possible, and encouraging

⁵⁹ IEDOM (2021) Tendances Conjoncturelles; Mayotte. N° 665 / Juin 2021. Available at:

https://www.iedom.fr/IMG/pdf/tendances_conjoncturelles_1t21_vf.pdf

⁶⁰ *Ibid.*

⁶¹ *Ibid.*

⁶² RFI (2021) MPs warn of impending social chaos in French Indian Ocean island of Mayotte. Available at:

<https://www.rfi.fr/en/france/20210401-mps-warn-of-impending-social-chaos-in-french-indian-ocean-island-of-mayotte-poverty-violence-illegal-immigration-health-covid>

businesses to register. Poor infrastructure development also remains an impediment to long term economic recovery, given Mayotte's limited transport (road and port), water and internet infrastructure⁶³.

6. SUGGESTIONS FOR RECOVERY AND RESILIENCE MEASURES

RECOMMENDATION 1: EXTENDING FORMALISATION SUPPORT

Type of measure: Informal sector support, awareness and investment

Duration: Medium to long-term

Challenge: Mayotte is characterised by the large size of its informal economy, which is mainly comprised of irregular and unregistered migrants. Unregistered businesses, most of them SMEs, have suffered from the impacts of the COVID-19 crisis but could not benefit from the various support schemes and state aid. Recovery-related measures to support enterprises and the employed, such as welfare payments and partial-activity schemes during lockdown, have only been open to registered companies, leaving informal businesses vulnerable and unsupported. Meanwhile, an estimated two-thirds of Mahoran businesses are currently part of the informal economy of the region, especially in the northern and southernmost communes.⁶⁴ The outbreak of the pandemic exacerbated the challenge for the informal sector, and many entrepreneurs had to cease operations. This further widened the income gap between the formal and the informal sector employees and business owners, because employees in the informal sector have no access to welfare payments from the State if they become unemployed. This increased inequality in the region, which was already high before the start of the COVID-19 pandemic.

Objective: Stimulate large scale registration and provide advisory support to encourage formalisation, increasing the number of companies in the formal economy and eligible for post-COVID-19 aid.

Actions: The aim is to increase the number of companies registered in Mayotte's formal economy to make them eligible for post-COVID-19 aid. In the short term, information campaigns could be developed through the government's website, for instance, to advertise the benefits of being registered, and to motivate unregistered companies to move to the formal economy. This, in turn, would allow them to make use of available funds developed to support struggling microenterprises. In addition, the awareness campaign could be accompanied by measures to lower the threshold or burden for registration. This requires an assessment of the current procedures, which aims to identify if these can be simplified (e.g. reduce requirements or waiting time, etc.). Setting up helpdesk facilities to provide information and hands-on support to companies would also facilitate the registration process.

In the medium to long-term, it would be key to ensure that such formalisation efforts are more integrated within the region's economic development and poverty reduction strategy to address the needs of the vulnerable groups. In a more integrated framework, the regional government could then explore possible options with associations and third-party private sector support organisations to provide business support services to strengthen the capacity of vulnerable groups. This could be coupled with business enabling environment measures such as the 'self-employed status' scheme (see Section 4) as well as reducing the regulatory burden on small businesses, subsidising costs for a specific duration and creating incentive structures to formalise, amongst others.

Mayotte could explore EU sources such as the Technical Support Instrument (TSI) and the European Regional Development Fund (ERDF) as well as the Single Market Programme (SMP).

⁶³ The French government already plans to lengthen the runway at Dzaoudzi international airport and to further develop the port of Longoni.

⁶⁴ Based on interview findings

RECOMMENDATION 2: STRENGTHENING AGRICULTURAL PRODUCTIVITY THROUGH A STRATEGIC ACTION PLAN FOR THE SECTOR

Type of measure: Sectoral support and strategy/policy

Duration: Medium to long-term

Challenge: Mayotte's economy is heavily reliant on the tertiary sector, while agriculture has limited economic contribution to the region. This is largely due to a mainly subsistence-oriented agricultural and industrial production base, which does not allow for large quantities of products. Subsequently, the volume of exports is low while the level of imports remains significantly high. As a result, the region is often faced with a trade deficit due to the large difference between export revenue and import expenditure; in the last quarter of 2020, the trade deficit was € 73 million.

Although the sharp drop in exports in 2020 was partly due to the pandemic, trade in agricultural products in Mayotte generally suffers from seasonal variation and low productivity. Its geographical isolation and the long supply chains lead to disruptions in the supply of goods, especially necessities such as food. Consequently, the region would benefit from a lower dependency on imports. Resilience to similar future shocks can be increased by enabling local production to sufficiently cover local demand.

Objective: Achieve lower agricultural import dependency by exploiting the potential of local farms.

Actions: Given Mayotte's dependence on food import and low levels of agricultural productivity, it would be useful to assess possible interventions to strengthen the regions agricultural strategy and action plan with a focus on improving the sector's long-term productivity and sustainability. The Ministry of Agriculture and Food has been engaged in taking forward important steps. Strengthening the current framework with a clear action plan could assist the region in improving its productivity. This means to assess the feasibility of actions towards (i) investments in human capital through extension service training to farmers on farming techniques and productivity increase, (ii) agricultural infrastructure (access to land and resources, which is a key challenge) and finally (iii) the value chain linkages to facilitate farmers' connections to markets. Important to note that long-term agricultural productivity cannot be achieved in isolation. Therefore, it will be key to ensure such a framework and strategy integrates a robust agricultural innovation system, i.e. one that is driven by stakeholder consultation, collaborative farming approaches and strong ownership of the associations.

Mayotte could explore EU funding possibilities under the European Agricultural Fund for Rural Development (EAFRD) and the Programme of Options Specifically Relating to Remoteness and Insularity (POSEI). Meanwhile, the Agrisud International NGO and its partners also provide local communities in Mayotte with support in the implementation of good practices and the economic management of their production⁶⁵, and further projects could be explored.

RECOMMENDATION 3: SUPPORTING THE DIGITAL MODERNISATION OF BUSINESSES

Type of measure: Investment and infrastructure

Duration: Medium to long-term

⁶⁵ The project "Strengthening ecologically and economically the activities of Tanafou Yhazi — M'Tsahara" aims to to professionalize an association of women producers through internal governance, agroecological production and agroforestry as well as by improving the value-added processing and the marketing.

Challenge: The COVID-19 crisis has highlighted the lack of digital literacy and modernisation among business owners in Mayotte. The pandemic and accompanying measures led to a significant reduction in business activities. This has emphasised the need to accelerate digitalisation, which can help in the adaptation of business models and contribute to the recovery of the economy. However, Mayotte is one of the outermost regions (together with French Guiana) which does not yet have a digital transition plan.

Objective: Support the digital transition of businesses through a staged approach.

Actions: While an overall digital transition plan involving all stakeholders could be developed, in light of the COVID-19 pandemic, supporting the digital transition of companies could also take place. This requires a staged approach, guided by a Regional Digitalisation Plan. Such a plan could be developed involving relevant stakeholders (which could include the Chamber of Commerce at a regional level and the French Digital Agency at national level). As the level of digitalisation is low in Mayotte, the region first requires particular support to improve access to both hardware and software digital tools. In parallel, it will be critical to promote the adoption, diffusion and effective use of advanced digital tools amongst companies, particularly SMEs and microenterprises. This requires awareness campaigns on the benefits of digital transformation, but also support to investment in ICTs (hardware and software) and training to develop the relevant skills. The Digital Unit within the Chamber of Commerce already provides digital training to SMEs⁶⁶ on a small scale. Their efforts could be built on further to reach larger groups. The combination of these measures will stimulate the adoption and diffusion of digital technologies.

Mayotte could explore national and EU sources of support. EU sources could include European Bank for Reconstruction and Development (EBRD) financing channels to support SMEs, the European Regional Development Fund (ERDF), and the Digital Europe programme. At the national level, the French government has allocated €7 billion to digital investments for the next two years as part of a stimulus package to help the country economically recover. Mayotte could explore the possibility of accessing this fund to support its digital transformation.

RECOMMENDATION 4: INCREASING HEALTHCARE PROVISION

Type of measure: Infrastructure, investment and training

Duration: Long-term

Challenge: Mayotte currently has only one hospital in Mamoudzou to serve the region's population of 279,000, excluding the irregular, unregistered inhabitants. Life expectancy is nearly seven years lower than mainland France while health expenditure per capita remains low. The number of available hospital beds per 100,000 people in 2019 in Mayotte was 136 compared to 584 in France, although a new emergency care unit was opened in Petite Terre in February 2021. The number of doctors in Mayotte is substantially lower than France's, with 81 compared to 336 doctors per 100,000 people in 2019, respectively. The pandemic has shown that the current capacity poses serious constraints, as a large number of intensive care unit (ICU) patients had to be transferred to Réunion.

The region has set up a networking workshop for professionals in the health and social sectors, thus facilitating and encouraging professionals to apply to work in Mayotte. The idea is to put Mayotte's social sector agencies in touch with future graduates and/or professionals. They offer various applications for students at the end of their studies, both in the paramedical field (nurses, pharmacists, etc.) as well as in the field of social action (social service assistant, educators of young children, etc.).

Objective: Increase healthcare capacity by improving medical facilities and attracting human capital.

⁶⁶ More information available at: <https://www.mayotte.cci.fr/developpement-economique/accompagnementdentreprise/cellule-numerique/>.

Actions: Increase the healthcare capacity in the region will require investment in medical facilities, to expand the capacity of the current hospital or to build an additional hospital, based on an up-to-date health needs assessment.

In addition, to make use of these facilities, it will also be necessary to expand the number of health professionals and supporting staff. In the short term, this could be done by motivating medical staff currently employed elsewhere to work in Mayotte, e.g. by offering attractive reward packages. In the longer term, the network workshop set up by the region would help to increase the availability of medical staff, e.g. by offering specific scholarships to students following the completion of their medical training.

Mayotte could explore national and EU sources of support. EU sources could include the European Regional Development Fund (ERDF) for investment in healthcare infrastructure, the European Social Fund (ESF) to support the labour market in the healthcare sector. National sources could include the *Agence Francaise de Developpement*, which also works in Mayotte and aims to improve healthcare and social-medical services in the region.

RECOMMENDATION 5: ENHANCING EDUCATIONAL CAPACITY AND SKILLS

Type of measure: Investment, education, training and skills

Duration: Long-term

Challenge: Mayotte has a high unemployment rate, especially among its younger population. Mayotte's population is young, with around 70% under the age of 30. The region also faces challenges around education. Its infrastructure for education is insufficient. Currently, there is a rotational system of teaching in which half of the students take classes in the morning while the other half attends classes in the afternoon. Investment in classroom and building facilities is low. In addition, school dropout rates are high. As a result, youth educational attainment levels are low, leading to a lack of skilled staff in the region.

The outbreak of the pandemic has exacerbated the challenges related to education, as following the COVID-19 school closures and the lack of digital tools to facilitate distance learning, fewer classes could be provided. Moreover, there is a risk of students not returning to full-time education after the restrictions are lifted. It is important to address the challenges related to education, as improving education will upgrade the knowledge and skills of students, and therefore help reduce youth unemployment.

Objective: Improve the skill level of Mahorans through capacity development and skills training.

Actions: Given the lack of resources and the inherent challenge presented by educational dropout rates, a twofold approach is possible. The first step would be to increase infrastructure capacity by expanding classroom facilities, and to expand the number of teachers. Meanwhile, since dropout rates are at least partially related to poverty and the need to find employment, we suggest developing possibilities to combine work and education, in order for students to continue their education while gaining professional experience as well as income through a job. This could be achieved through collaboration with enterprises to offer paid vocational apprenticeships to students. Combined work-education programmes have also been identified by interviewed stakeholders as a possible mechanism to create jobs and improve skills in the region.

Mayotte could explore EU funding sources, including the European Social Fund (ESF) and the Youth Employment Initiative (YEI), Erasmus+, the EU Solidarity Corps.

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