



Telecommunications

Media & IT

Cluster performance,
Outlook and Strategies



What we do

From the first cellular telephony operator in the Southern Hemisphere in 1989, Eritel has grown into one of the most technologically advanced operators in Africa. A one-stop ICT solutions provider, its mission is to improve lives by providing the latest telecommunications technologies to meet the needs of individuals, households and businesses of all sizes.

Eritel continuously invests in and upgrades its network infrastructure to stay ahead of the technological curve. It is the only operator in Mauritius that delivers international connectivity solutions via the 3 submarine cable systems that connect Mauritius to the world: SAFE, LION and METISS. While Eritel owns capacity on SAFE, it is a consortium member on LION and a founder member of METISS. Eritel's communications services include mobile and fixed telephony, high-speed internet, cloud services, connectivity, network and security solutions that are backed by 24/7 customer support and a state-of-the-art TIA-942 Tier 3-rated Data Centre to ensure business continuity for enterprises.

Driven by its innovative spirit, it continues to bring telecommunications to new heights, from being the first 3G network in Africa, the first 4G network in Mauritius and developing products such as the plug-and-play Airbox, high-speed wireless home Internet and Eritel Cash. Now, it is laying the foundations for the island's next-generation applications that will change the game for individuals, households, businesses and smart cities.

Our brands



“The challenging conditions over the last two years have been an opportunity to reflect upon and accelerate our ambitions in various avenues, including 5G, Fintech and the space economy, and in doing so, diversifying our revenue streams. All of this is underpinned by a strong culture of excellence and high-performing teams.”

Kresh Goomany,
CEO

MUR 3,125M

1.2% ↑

MUR 663M

Operating profit
14.9% ↓

Performance highlights in 2021

In 2021, Covid-19 continued to dictate behaviours and spending patterns. Sanitary restrictions were maintained across the country, with some regions clustered as red zones. The population remained prudent, avoiding entering stores or crowded places. This was exacerbated by Mauritius being placed on France's Scarlet Red list and the FATF's grey list, severely affecting tourist inflows, and by extension, our business. Our sim card sales and roaming revenues both declined. Our costs, for their part, increased by MUR 18M in the second quarter compared to the corresponding period in 2020, as a result of a weakened currency, investments in private transportation and other sanitary measures to protect our employees.

Schools in Mauritius were closed for most of the year, with students and families spending an increasing amount of time at home. Data volume ramped up as people stayed home browsing social media, using video conferencing apps and consuming content more than ever before on their already unlimited home Internet offer, hence impacting our data pack sales, as well as voice revenues. At the same time, inflation is influencing purchasing decisions towards essential products and services. While there is no doubt that the pandemic has strengthened the value and importance of telecommunications, this awareness has not translated into increased revenues.

All of this resulted in a lower operating profit compared to 2020.

Despite facing a difficult sanitary situation and closed borders for nine months, turnover increased by 1.2% year-on-year.

Investing in a robust network

The METISS cable became operational in March 2021, only a few days before Mauritius went into lockdown. The timing was fortunate, as the submarine cable's capacity, coupled with the robustness and reliability of our network, catered for the upsurge in traffic. Alongside this, the role of our data centre has crucially expanded: as businesses shift their model towards the cloud and business continuity plans, our data centre is providing them with the ability to store vast amounts of data and maintain their day-to-day operations seamlessly, even when working remotely. This gives us the impetus to continue investing in our existing data centre, and explore the creation of another one.

Venturing into the space economy

This year saw the first step towards venturing into a new area: the space economy. Emtel won the international tender for OneWeb, a London-based company with a mission to bridge the connectivity gap across the world through a global constellation of low-orbit satellites. As a result, we are building a ground station in the South of Mauritius, the first of its kind on the island and the region. Once operational, the ground station will provide gateway services to the entire Indian Ocean and to maritime and airborne communications, and provide the ground support necessary to reach even the most remote parts of the region. While Emtel is lending its on-the-ground expertise and resilient infrastructure to the project, we are collaborating with the Real Estate cluster on the development and management of the ground station.

Creating tailored packages for customer segments

Our strategy to offset our losses was centred on launching promotional campaigns for mobile data, unlimited data plans, Airbox to enable working from home, and a broadband package especially designed for students to have a separate Internet access at home for remote learning. To ensure the widespread adoption of these new packages, we increased our communication on social media channels to educate our customers and engage with them more frequently. Overall mobile data revenue grew by 7.2% YoY.

Accelerating our digital initiatives

Last year saw the development and implementation of digital offerings, including digital payments, digital customer service and digital recharges. We are now incentivising customers to use those channels to increase the adoption rate.

Laying the foundation for next-generation solutions

2021 was the year where we reviewed our strategy and way forward for 5G. We embarked on an RFP and evaluation of 5G offers during the year and will be ready to formally deploy it in 2022, along with a complete network modernisation. With the METISS cable in place, coupled with our fibre reach around the island, the foundations are in place to accelerate innovation in every field, enhance productivity and collaboration, and bring significant benefits to our society.

Leveraging Group synergies

We opened six new showrooms with MC Vision, where we have introduced bundled products that combine broadband, data and content. This convergence is even more critical as we roll out 5G to support an ecosystem of next-gen media entertainment solutions.

These synergies also involve our teams, who have benefitted from cross-training and the transfer of knowledge between businesses. The convergence of our teams is a work in progress whose success is dependent on the day-to-day interactions between our teams, not just one-off training sessions.

Strengthening employee engagement

We launched the Living The Brand (LTB) initiative, led by our CEO. By instilling the right behaviours, attitudes, discipline and a strong sense of team spirit across the business, the goal is to ensure that all employees become avid ambassadors of the company and its products and services, and in turn, deliver an excellent customer experience. We have embarked on a series of initiatives to disseminate the concept.

Improving our odds at Positive Disruption

Innovation

Diversification into 5G, Fintech and the Space economy; launch of METISS cable; ramped up capacity in data centre to better service the population; synergies with MCV and the Real Estate cluster.

People-centred culture

Launch of 'Living the Brand' initiative; appointment of 'champions' to ensure the success of the convergence of Emtel and MCV teams.

We Care

Focus on environment-related initiatives: tree-planting, reduction of plastic, recycling of e-waste; ran a blood bank for Emtel employees.

Contribution to CJ's strategy



Priorities for 2022

There is a strong sense of optimism for the forthcoming months as Mauritius progressively eases sanitary protocols, borders have reopened and the island as a destination is being promoted internationally by authorities.

Considering the limited and competitive local market we operate in, our strategy is to continue diversifying our revenue streams:

we aim to offer more relevant mobile packages to customers;

we intend to further expand our footprint of converged showrooms with MCV across the island;

we are in the process of creating a second data centre to cater to the needs of the country;

we intend to continue developing our 5G strategy to the first of its kind in the country;

we have also developed a Fintech strategy, which will be launched with a state-of-the-art platform in 2022. Emtel will be the first mobile operator to offer a service that all customers will be able to experience, irrespective of which bank they are subscribed to.

Our ambitions are to support Mauritius in its vision to exploit the space and satellite economy. We aim to complete the civil works for the ground station in 2022. As we collaborate with OneWeb, a major international expert, we believe this will lead to the development of other related sectors and place Mauritius on the map as an innovation centre. With this in mind, we obtained the Premium Investor Certificate (PIC) from the Economic Development Board (EDB) to pursue the creation of Emtel Technopolis, an integrated technology park that will provide a conducive environment for R&D and innovation and facilitate our transition towards a knowledge-based economy.

Employee engagement will continue to remain one of our priority areas, on an ongoing basis. We aim to further strengthen the team spirit by nurturing LTB and inspiring employees to live the concept in their day-to-day activities.

“**Innovation has always driven our strategy: this means not just bringing fresh and exclusive content to Mauritians, but also offering multi-screen options, aggregating the best content on one single platform, and delivering a truly personalised viewing experience.**”

Ghislaine Tchibozo,
CEO

MC Vision

What we do

Since its creation 20 years ago, MC Vision has consolidated its position as the undisputed leader in the Digital Pay TV market in Mauritius. The company is driven by its ability to constantly deliver the newest products and services in line with market evolutions, and continuously enhance the viewing experience of its subscribers.

From pioneering Digital Satellite Television in 1999, MC Vision has evolved into a sophisticated provider of premium and exclusive content, available in linear and non-linear forms across platforms and devices. Thanks to strong strategic partnerships, it has acquired exclusive rights over channels like CANAL+ and Disney, and broadcasts the latest movies, series, sporting events and documentaries across 100 channels and a library of 60,000 on-demand titles.

As a major content aggregator, it has also introduced streaming services such as Netflix and Disney+ to Mauritian viewers. To support its strategy of making content available anytime, anywhere and on any device, MC Vision has its own application, myCANAL, accessible on PC, tablets and smartphones, and Airbox+, an integrated television and internet offer.

Our brands

CANAL+

my**CANAL**

Disney+

MC Vision

MUR 1,278M

Turnover
6% ↘

MUR 60M

Operating profit
52% ↘

Performance highlights in 2021

MCV operated in an unsettling environment: the lockdown in March, and subsequent set-up of red zones around the island, hindered our teams from carrying out technical installations and interventions for three months. The devaluing Mauritian Rupee continued to have an impact on our costs. In parallel, waves of Covid-19 infections across Mauritius and among our teams led to major operating disruptions and the intermittent closure of our showrooms. Despite these challenges and customers' hesitance to visit physical showrooms, sales were up compared to the same period in 2020.

Our subscriber base shrank by 3,6%, impacting our financial performance.

Our performance took a turn for the better as from September, thanks to the undermentioned points. The reopening of the borders in October also allowed for the generation of hotel turnover, which had been non-existent for almost two years.

Innovating fiercely to adapt to new realities

MCV operates in a competitive environment, where we face the pressure of retaining subscribers who have more options, have grown savvier and are more cost-conscious. Our value proposition was reviewed with these realities in mind. We also believe that good content should be within everyone's reach. In August 2021, we reassessed our packages in a way that takes into account the declining spending power of customers, leading us to reduce our basic Canal+ package from Rs 800 to Rs 410 to enable all Mauritians to continue enjoying content without breaking the bank. Our various packages are now suited to every customer segment and every budget.

We introduced new features to the MyCANAL app, in line with our journey of continuous improvement. We simplified the customer journey and introduced individual user profiles to enable multiple members of a household to have personalised accounts and a tailored selection of viewing options, based on their unique preferences.

Another one of our achievements this year was the availability of MyCANAL and the 4K decoder on all networks, which were previously accessible to subscribers of Emtel only.

As from August 2021, we were able to announce the securing rights for the UEFA Champions League and the English Premier League. We are proud of this achievement, particularly as football plays a vital role in the lives of Mauritians. Subscribers are also able to watch these matches on MyCANAL. The response was extremely positive, with sales increasing by 100%. On the downside, as from December 2021, our competitors also obtained the rights to these sporting events.

To respond to consumer demand and increase our subscriber loyalty, we expanded our content library from 20,000 to 60,000 on-demand titles. We also fast-tracked the process of replacing our customers' decoders with the latest one, aiming to have 80% of our subscriber base equipped with the upgraded decoder by the end of 2022.

All of the above led to our activities picking up in the last quarter of the year, with 60% of our sales being realised during that period.

Realising synergies with Emtel

Our shared showrooms with Emtel have contributed to driving down our costs, while increasing the visibility of both brands. We opened six new shared showrooms during the year in strategic locations around the island. Our Finance and Human Resource teams have merged, while our Customer Service and Sales teams work in close collaboration. This has enabled us to offer a consistent level of customer service across both entities, and also optimise the costs of training.

Staying on top of technological trends

We completed a number of major digitisation projects during the year to enhance our efficiency. We automated several Accounting processes, upgraded our online payment gateway system, and automated internal processes.

Providing high image quality is essential for MCV. To achieve this, we started working on the replacement of our headend, which receives incoming programming. This headend has the latest technologies in terms of content encoding and security management, and provides a superior viewing experience to subscribers with better image quality. Moreover, this headend is future-proof and provides the flexibility needed to deploy new offers and features, such as live stream backups via OTT during cyclones.

Improving employee engagement to drive customer satisfaction

Employee engagement levels are key to creating a compelling customer experience. We relocated our headquarters to Les Arcades Currimjee in February 2022 and worked on fostering a more collaborative environment: our teams work in an open space to encourage the cross-fertilisation of ideas and knowledge.

We also hired key personnel in Sales and Marketing, two of our growth drivers, to boost our sales.

After bringing our social media operations in-house, we have observed a significant improvement in customer service. As we gain feedback and insights directly from our subscribers, our response rate has dropped to less than two hours.

Recycling and upcycling

Recycling and the responsible disposal of waste is part of our DNA. For now, e-waste is sent to Reunion for recycling but we are exploring local options, as much as possible, to carry out these actions.

This year, we took our actions a step further by partnering with Plastic Industries Mauritius to transform the plastic covers of our decoders into pen holders.

Improving our odds at Positive Disruption

Innovation

Obtained broadcasting rights for football seasons; proposed myCanal on all Internet Service Providers; replaced decoders of all subscribers; reviewed product positioning and pricing; expansion of content library to over 60,000 titles.

People-centred culture

New headquarters for MCV with collaborative open spaces; addition of key personnel to strengthen the team; synergies with Emtel to boost the team spirit and cross-fertilisation of knowledge.

We Care

Reused all equipment from old offices when we relocated our headquarters; disposal of decoders and other e-waste to recycling plant in Reunion island; upcycling of plastic waste into new products; use of solar panels to reduce energy consumption.

Contribution to CJ's strategy



Priorities for 2022

Our biggest priority is to reinforce our position as a premium content aggregator. At the same time, we are focusing on optimising costs through the digitalisation of subscriber-facing processes and internal processes.

A diversification strategy is key to our growth. We aim to expand our distribution network by opening three new merged showrooms, recruiting new retailers and exploring different distribution channels.

Equally important is the replacement of all decoders by 2022 to ensure maximum service usage and adoption. We also aim to complete the replacement of the headend this year.

We expect inflation to accelerate, particularly with the war in Ukraine upon us. Entertainment is expected to take a direct hit as consumers prioritise essential products and services. Knowing this, we aim to maintain our services at an affordable rate. Having spent the last few years introducing innovative products, we will now focus on ensuring their widespread adoption by our subscribers. 2022 will see renewed efforts in creating an exceptional customer experience around our existing products and services. This cannot be achieved without high employee engagement and effective talent management.

Over the medium term, we are aware of our unique position to leverage CJ Group's various entities to strengthen our value proposition. Content and connectivity go hand-in-hand, and we have major projects planned with Emtel to ensure that the back-end technology delivered by Emtel supports the high-resolution content offered by MC Vision.



“ Our intrinsic organisational agility has helped us come out safely from the Covid-19 turmoil. Combined with our people’s expertise and passion, we swiftly responded to new market needs with smart technologies and expanded into non-hospitality verticals. ”

Rouben Soobrayen,
General Manager



What we do

Screenage provides the next-generation IT technologies and managed services that businesses need to embrace their digital vision. While the focus remains on hospitality, Screenage’s solutions can be used across multiple verticals, including Healthcare, PDS, Smart-City, Retail and Corporate.

Thanks to its exclusive privileged partnerships with world-leading technology vendors like Fortinet, HPE Aruba and Hoist, it offers clients a range of solutions in the realms of:

- Content Management: IPTV system, Digital TV, Guest Engagement App
- Network: LAN & Wi-Fi, Presence Wi-Fi Analytics, Structured Cabling System
- Cybersecurity: Perimeter firewall, threat analytics-driven security management
- Video Surveillance: CCTV with automated video Management system

Screenage’s ability to manage complexity, deliver a consistent level of reliability, and offer round-the-clock B2B support has made it the Managed Services Provider of choice for businesses across Mauritius and the Indian Ocean.

Our brands



MUR 34.7M
Turnover
-0.5% ↓

MUR 1.7M
Operating profit
2020: Operating Loss:
MUR8.7M

Performance highlights in 2021

In 2021, Screenage performed well, recording a 20% gross profit growth over 2020 in spite of a challenging operating context due to Covid-19-related challenges::

- Mauritius went into an unexpected lockdown in March, delaying the reopening of borders from June to October. While they continued benefiting from the government's Wage Assistance Scheme, most hotels remained shut during, and after, the lockdown. Having seen their maintenance expenses skyrocket in 2020, even with no guests, most hotels rethought their strategies in 2021. In contrast to 2020, where they opened to the local market, hotels now chose to stop operating entirely, rather than operate with minimal revenue while continuing to incur exorbitant maintenance costs.
- France placed Mauritius on its Scarlet Red list of countries in October 2021. Flights to Mauritius were suspended due to concerns about the Omicron variant, leading to mass cancellations of reservations. Hotel occupancies, which were faring well at 70% after borders reopened, dropped to nil following the announcement. Though Mauritius was removed from the Scarlet Red list a few days later, it affected the island's reputation and hotel bookings did not pick up until December. Fears about the widespread Delta variant continued to deter tourists from travelling to long-haul destinations such as Mauritius.
- Since 2020, the world has been experiencing a massive shortage of semiconductors, which power all electronics. At the same time, demand for consumer electronics is spiking. This has left many businesses, including ours, without the inputs and supplies necessary to carry out their activities. Not only are we suffering from a significant backlog of orders, preventing us from receiving equipment on time, but our costs have also increased tenfold as a direct result of higher freight rates.

Pursuing our diversification strategy

We pursued our strategy to expand into non-hospitality businesses and onboarded two major clients for Wi-Fi deployment: Mahogany Shopping Centre and Victoria Urban Terminal.

In parallel, we welcomed a new hotel, LUX* Grand Baie, where we deployed IPTV services.

Launch of new solutions

Through Wi-Fi analytics, we have been providing Mahogany Shopping Centre with valuable data on their customer demographics, frequency of visits and traffic, among others, all of which can be used to develop more targeted marketing activities and transform the visitor experience.

We deployed an AI-powered Smart Perimeter Surveillance system at Anantara iko Mauritius Resort & Villas, whose goal is to increase security within and around the hotel through automated intrusion detection and sophisticated video analytics.

We enhanced our guest engagement app to elevate the guest digital experience, and deployed the latest version at Preskil Resort. Our app offers guests a digital self-service utility at their fingertips before, during and post their stay. The centralised dashboard manages all guests' requests in real time, allowing the hotel to streamline its operations. Our app also provides live guest experience analytics to hotel management, enabling it to quickly adjust the customer service strategy.

Improving operational efficiency

We progressed on our digital transformation roadmap, which aims to streamline our processes and increase efficiency. We digitalised our sales and project management, giving us deeper insights and allowing us to carry out more meaningful and targeted actions.

Upskilling our team

During and after the lockdown period, we remained committed to upskilling our team and providing training in areas that are critical to our business. Our efforts culminated in Screenage being upgraded to a Platinum Partner level at Fortinet, which confirms our expertise in cyber security and our ability to deliver exceptional service. This would not have been possible without the motivation of our teams.

Our employees are committed to giving back to society and are equally committed to Screenage's CSR projects: they contributed funds and their time to help students in a low-income school in Albion, as well as children who needed specialised medical treatment.

Improving our odds at Positive Disruption

Innovation

Launch of innovative products (Wifi analytics, Smart Perimeter Surveillance), expansion of non-hotel client portfolio

People-centred culture

High employee engagement levels and upgrade of skills through continuous training, leading to the upgrade to Fortinet Engaged Advanced (platinum) Partner.

We Care

Voluntary participation of staff in social endeavours; through Trampoline, lending of support to Everbloom, an organisation engaged in sustainable agriculture.

Contribution to CJ's strategy



Priorities for 2022

We believe we will continue operating in a VUCA (Volatile, Uncertain, Complex and Ambiguous) environment in 2022. The semiconductor shortage is likely to heighten due to the war in Ukraine. Both Ukraine and Russia are important suppliers of the key raw materials required to manufacture semiconductors, such as copper and minerals. The impact will be felt across industries, and we expect supply shortages and price hikes to worsen. Depending on how the war evolves, it may also exacerbate the challenges facing the tourism industry and impact some of Mauritius' main markets in Europe.

Keeping these risks in mind, we intend to advance on our current strategy, which so far has given us a competitive advantage and proven successful:

- continue enhancing our existing products with new features, while also rolling out new products;
- focus on cybersecurity solutions, which will form part of the value proposition we offer all clients;
- the continuation of our internal digital transformation efforts, as well as our expansion strategy regionally and internationally, starting with Seychelles.

We also aim to work on repositioning Screenage as more than just another system integrator; rather, Screenage seeks to establish itself as a managed services provider that is a vital part of any business' value chain.



OPERATIONAL EFFICIENCY



BUSINESS PORTFOLIO MANAGEMENT



FINANCIAL RISK MANAGEMENT



SUSTAINABILITY FOCUS

“ We have embraced disruption with agility and positivity. This enables us to listen to our customers and build up the technological competencies that are relevant to their business growth. ”

Anousha Mahadea,
General Manager



Currimjee informatics Ltd

What we do

CINF is an established player in the IT landscape in Mauritius, with a footprint across the UK, Morocco, Dubai, Zanzibar, Reunion Island, Madagascar and Seychelles. A pioneer in the Business Intelligence space in Mauritius, CINF has also developed expertise in areas such as Business Application, Advanced Data Analytics, Digitisation Data Security, IT Consulting, Cloud Infrastructure and System Integrator and a 24/7 Technical Service Desk. It helps businesses embark and progress on their data and digital transformation journey.

Underpinning its world-class products and solutions are a team of certified employees and an ecosystem of reputed international partners like HP, Oracle, IBM, Microsoft and Digital Guardian, among others.

Our brands



MUR 110.3M

Turnover
56% ↑

MUR 2.7M

Operating profit
134% ↑