



QUANTUM LEAP

ZEE LEARN LIMITED | ANNUAL REPORT 2017-18

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QUANTUM LEAP

If there is one thing that can be isolated as an element that has helped progress or bring paradigm changes in human evolution, it has to be Knowledge. And the key to absorbing the ever changing knowledge is education. Quality education is not only the key to a better future, but also a success mantra for civilised and prosperous society. It helps a nation to take a quantum leap in terms of economy and transformation of its society.

We, at Zee learn, are an advocate of this belief and have continuously endeavoured to bring a positive change in the Indian education sector through our innovative educational tools. We have been leading from the front and providing quality and world class education, starting from the Early Childhood Care and Education (ECCE) to K-12 school education to shape the individual's skills and make them future ready. We are spreading the light of education through our Kidzees, where our focus is to bring the curiosity and love of learning as the first stepping stone of a child's lifelong education process; and Mount Litera Zee Schools that is empowering the youth. We have stepped beyond the realm of K-12 to vocational and professional training through Zee Institute of Media Arts (ZIMA), Zee Institute of Creative Art (ZICA) and Zee Institute of Teaching Arts (ZITA). Looking at continuing our philosophy of providing world class and quality education beyond the schools, we took another quantum leap in the corporate world where we have introduced our Liberium division. The division's aim is to support corporate to focus on their core business and offer them the entire gamut of the HR responsibility, including payroll processing, recruitment, training, etc.

We have also acquired MT Educare Ltd., a coveted name in the education sector, to add to our existing educational offering. This is indeed an ideal marriage of two players who have revolutionised the education domain.

Some of our progressive approaches towards education including ImaGenie+, ImaGenie, Kidzee Learning Tablet that touches all age groups, right from preschoolers to adolescents and youth. Our offerings are not only helping students but also increasing parent's awareness about the nature of quality education.

Importantly, we continue to take our latest education tools to the Tier II and Tier III cities, a quantum leap in propagating education in areas which remained untouched before.

Education is the
passport to the
future; for tomorrow
belongs to those
who prepare for it
today
- Malcolm X



QUANTUM LEAP... IN TECHNOLOGY

In our endeavour to provide high quality education to students in Preschools, K-12 schools and beyond, we envision a key role played by technology to transform education. Over the past many years, we have continued to build on our education knowledge base and added a layer of technology to effectively address learning needs at all levels. This has often brought a disruption in the areas where we operate and helped us race ahead of competition. The Company is the first in the Indian preschool segment to integrate Augmented Reality in learning with our ImaGenie offering for preschoolers and helping

the young learners to progress quickly and yet at their own pace along with higher engagement levels. Again, leveraging technology, our new product, 'Spell-English', under the ImaGenie+ umbrella provides an immersive language learning experience for the child. Importantly, our investment in technology has helped us to make the experience a holistic one as the programme encourages higher involvement of the parent, which ensures higher quality time for the child and fostering a positive experience around learning. With the acquisition of MT Educare, its technology offering, Robomate+, will improve face-to-face classroom training courses and provide online methodology for reaching students across geographies, not restricted to Indian boundaries.

Slowly and steadily, technology is taking over the entire education domain and we are confident that with our quantum leap in technology, as we become a torch-bearer in the high growth edutech market in India and beyond and offer the best engaging content to our students.





QUANTUM LEAP... FOR THE FUTURE

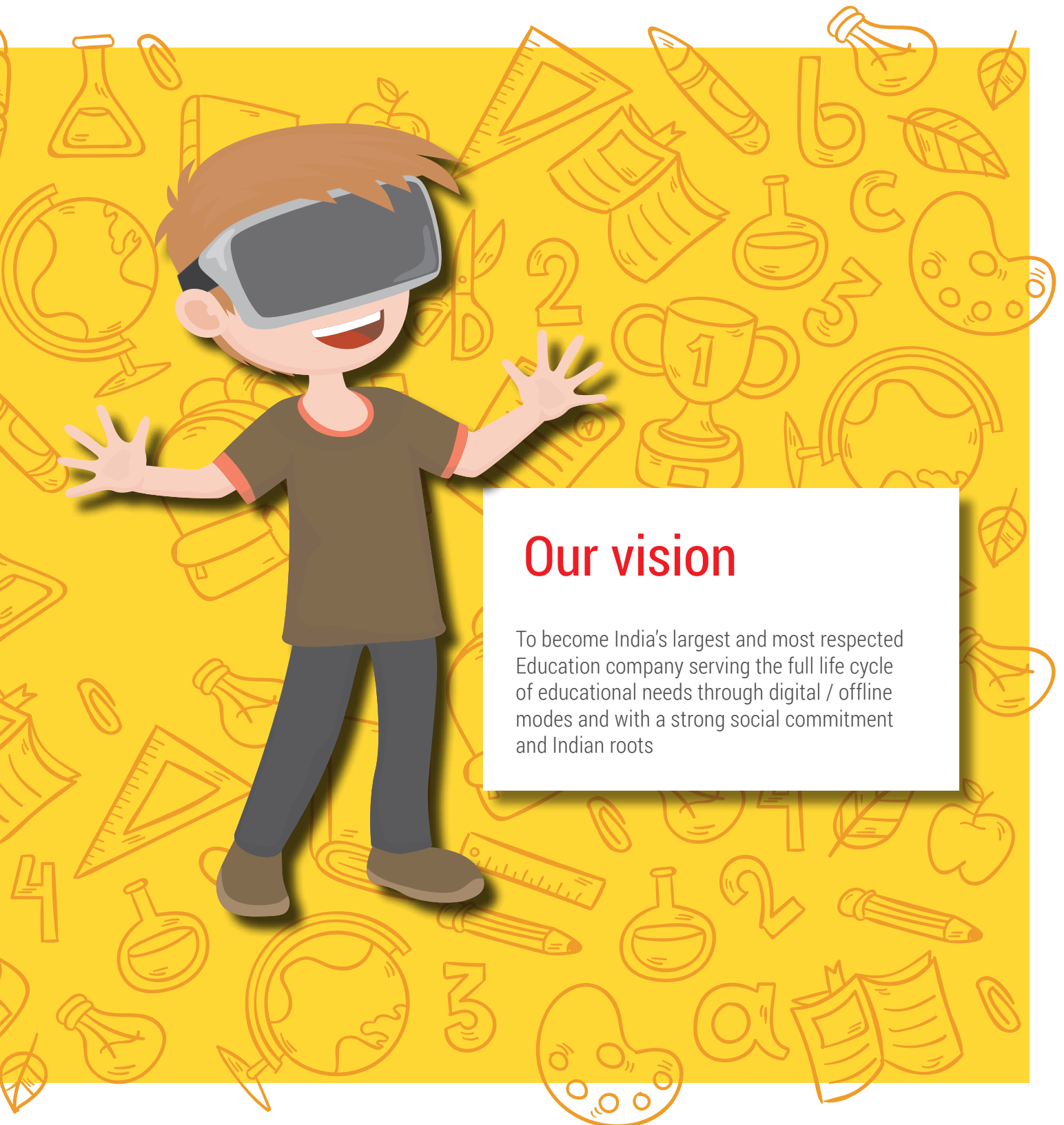
The Company has a strong presence in the Preschools and K-12 offerings through Kidzee and Mount Litera Zee Schools. For an above average growth, it is important for us to increase our footprint across the other segments in the education sector. While ZIMA and ZICA have helped us, the Company has been conspicuous by its absence in the high growth tutorial & test preparation and the government supported skill & vocational training segments.

Our acquisition of MT Educare Ltd. is in line with our vision to expand in these fast growing areas. MT Educare Ltd. has built a solid reputation in the education sector over the past 3 decades and will open doors for the Company in the test preparation/tutorials segment through MT Educare's other brands like Mahesh Tutorials, Lakshya and Chitale classes. MT Educare's significant presence in government supported skill and vocational training segment will help the Company to make rapid inroads in this segment. More importantly, we will cross pollinate technology and high quality teaching resources to the students of Mount Litera who will have access to very high-end content, curriculum, tutorials and test preparation opportunities giving a significant boost to the academic achievements of the schools in our network.

With the acquisition, we have taken a quantum leap towards a fast paced future as our combined education offerings would reach around 3.50 lakhs students, making the Company one of the biggest education companies globally in terms of number of students served.

With acquisition of MT Educare Ltd., the Company will further build on MT Educare's repository of knowledge, Digital content and platform (Robomate) for enhancing its offerings to Mount Litera Zee Schools and will also significantly strengthen MT Educare's presence in the informal education sector through Zee Learn's partner network spread across India. The Company through MT Educare will offer Mount Litera Zee School students, coaching / test preparation for courses like IIT / Engineering, MBA, MBBS, CA, etc. at Pan India level.





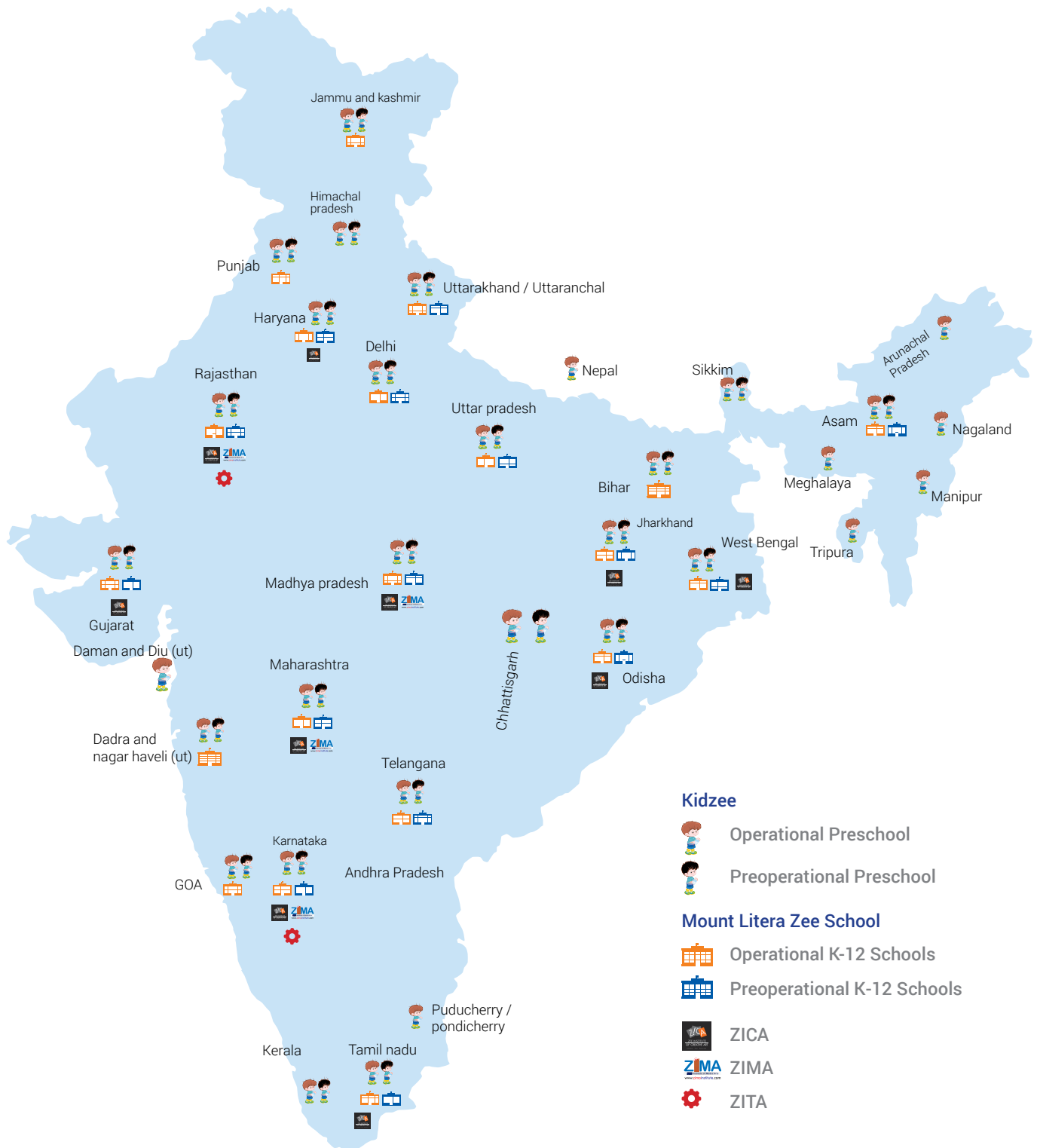
Our vision

To become India's largest and most respected Education company serving the full life cycle of educational needs through digital / offline modes and with a strong social commitment and Indian roots

GEOGRAPHICAL FOOTPRINT

Zee Learn ended the year with 2,014 centers located across India and Nepal

State	Kidzee		Mount Litera Zee School		ZICA	ZIMA	ZITA
	Operational Preschools	Preoperational Preschools	Operational K-12 Schools	Preoperational K-12 Schools	Operating Centres	Operating Centres	Operating Centres
Andhra Pradesh	80	3					
Arunachal Pradesh	8						
Assam	63	2			1		1
Bihar	125	19	11				
Chhattisgarh	27		1				
Dadra and Nagar Haveli (UT)	1	2	1				
Daman and Diu (UT)	1						
Delhi	36	7				1	2
Goa	11	1	1				
Gujarat	101	10	4		2		3
Haryana	63	7	7	1			2
Himachal Pradesh	10	1					
Jammu and Kashmir	29	6	3				
Jharkhand	30	5	5		1		1
Karnataka	164	24	7	1	2		4
Kerala	19	2					
Madhya Pradesh	101	13	10	4	1		
Maharashtra	210	47	7	1	3	1	9
Manipur	2						
Meghalaya	3						
Nagaland	1						
Odisha	37	2	4		1		1
Puducherry / Pondicherry	3						
Punjab	53	7	10				
Rajasthan	89	8	3	2	1	1	1
Sikkim	3	1					
Tamil Nadu	180	20	12		1		2
Telangana	16	14	4				2
Tripura	5						
Uttar Pradesh	177	39	21				2
Uttarakhand / Uttaranchal	19	4	5		1		
West Bengal	158	17	6	1			12
India Total	1,825	261	122	10	14	3	42
Nepal	8						
Grand Total	1,833		122		14	3	42



OUR MARKET-LEADING BRANDS



Kidzee is a market-leader in the preschool division of the Company which brings a structured and research based curriculum to help preschoolers discover their potential. The Company's proprietary pedagogy, Interactive Illume, has become a clear differentiator and with the launch of ImaGenie, it has become India's first preschool to integrate Augmented Reality in Learning. The division has over 1825 centres running across 750+ cities across India and Nepal.

**Mount Litera
Zee School**

Great School. Great Future

The Mount Litera Zee Schools is a leader in the field of providing holistic, quality and state-of-art education and covers the entire spectrum of education from kindergarten to K-12. It is the second largest network of schools in the private-aided category in India with over 122 schools across 100+ cities in India. A proprietary K-12 education model, Litera Octave, gives every student an opportunity to achieve his/her true, unique potential.



The ZIMA division is the creative and training academy for the film making and media industry. It has the best in class and international standard curriculum for its courses coupled with cutting-edge technology and infrastructure and highly experienced faculty from the Film, TV and Journalism industry. Currently, the courses in ZIMA are available in Mumbai, Noida and Jaipur.



ZICA is India's first full-fledged Classical and Digital Animation training academy offering training in 3D Animation, Visual Effects, Graphic Design and Web Design. Courses in ZICA are available in 14 centers across the countries and include major cities like Mumbai, Pune, Noida, Bengaluru, Chennai, Kolkata, Mangalore, Ranchi, Bhubaneswar, Guwahati, etc.



The division offers corporate the entire gamut of HR services including Remuneration Management & Solutions, Talent Management, Skill Development and HR Business Process Outsourcing.



The division fulfils the educational and aspirational needs of a diverse range of students from Class V to students appearing for Engineering and Medical entrance exams, exams for CA and MBA aspirants.