



# NIIT Limited: Company Overview

June 2021



**Company Overview**

**Corporate Learning**

**Skills & Careers**



# NIIT: At a Glance



**4**

DECADES OF  
EXPERIENCE IN L&D

**30+**

COUNTRIES  
WORLDWIDE

**2531**

NIITIANS

**2**

KEY LINES OF  
BUSINESS

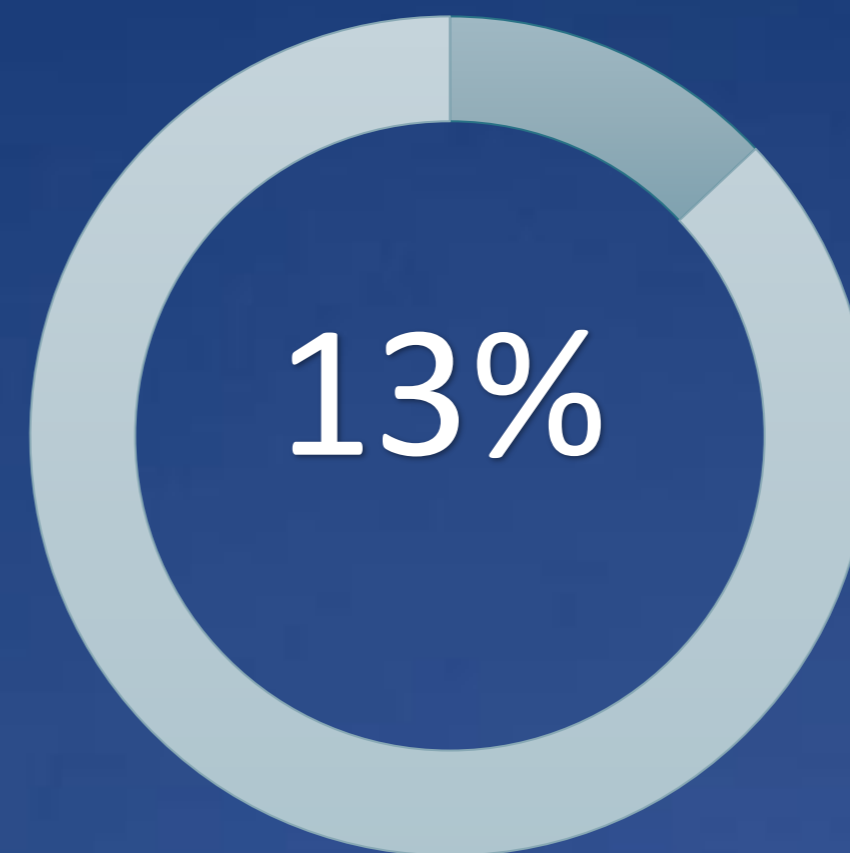
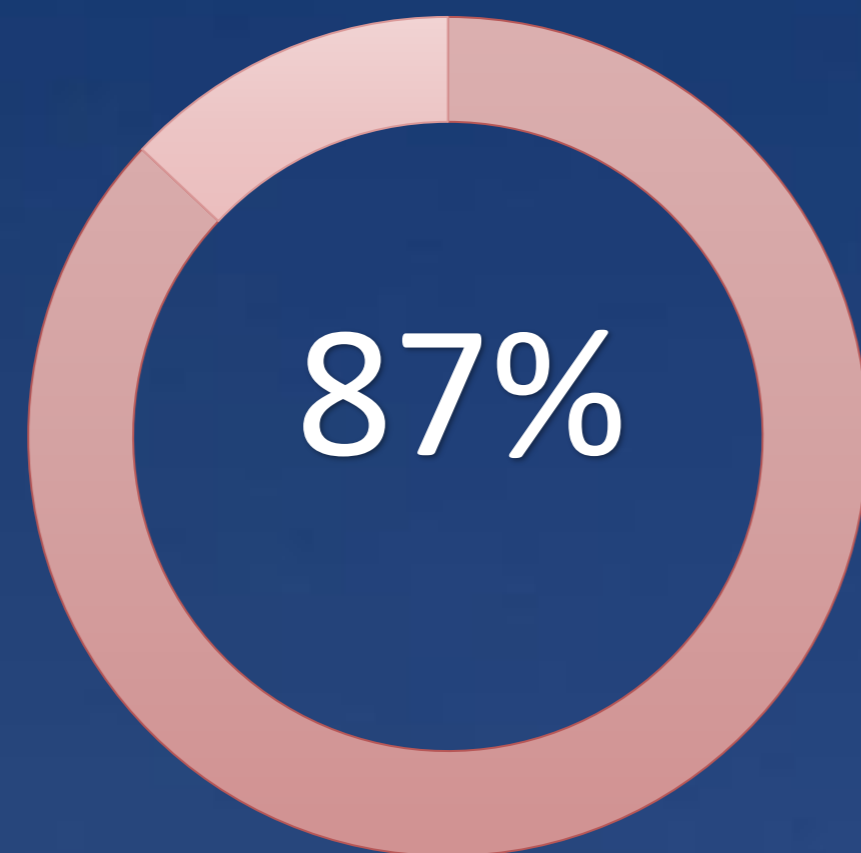
**38+**

MILLION  
LEARNERS  
TRAINED



HQ IN GURGAON,  
INDIA

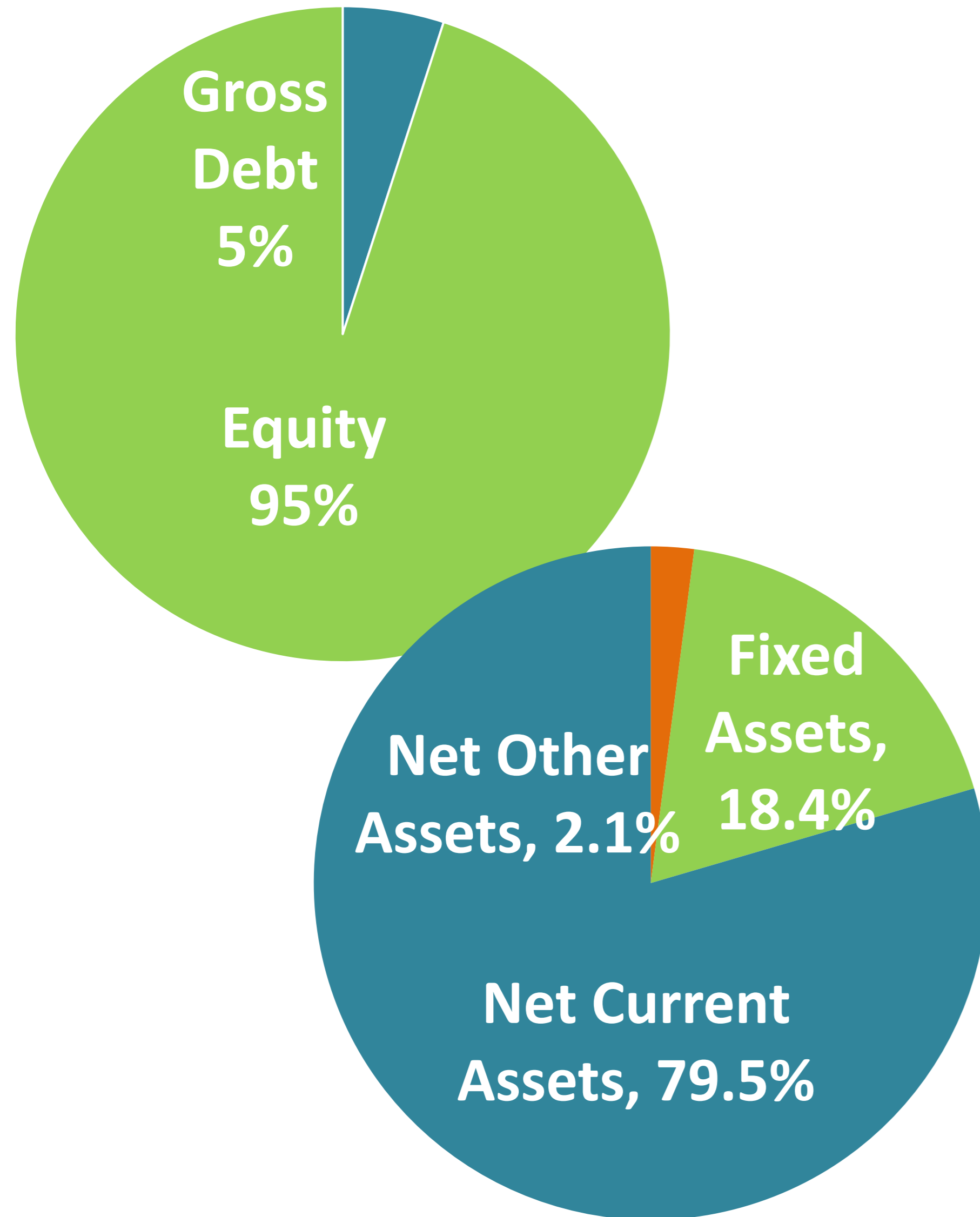




<b>CORPORATE LEARNING GROUP (CLG)</b>	<b>SKILLS &amp; CAREERS GROUP (SNC)</b>
INR 8,254 MILLION	INR 1,241 MILLION
Productivity	Employability
North America, Europe, Oceania	India, China, Africa
Managed Training Services Application Rollout Training Learning Advisory Custom Projects	Deep Skilling in IT, BFSI, and Others Service Sector Skills Talent Pipeline as a Service Professional Life Skills



## Total Capital : Rs 16,362 million



## Strong Balance Sheet and Liquidity

### Cash and Bank Balances

Rs 13,894 million

## High Capital Efficiency

**DSO**

54 Days

**ROCE\***

38.4%

\*Excluding Cash

# NIIT: Awards and Recognitions



**77 BRANDON HALL AWARDS**  
28 GOLD | 25 SILVER | 25 BRONZE



**8 CHIEF LEARNING OFFICER LEARNING IN PRACTICE AWARDS**



**3 LEARNING TECHNOLOGIES UK AWARD**



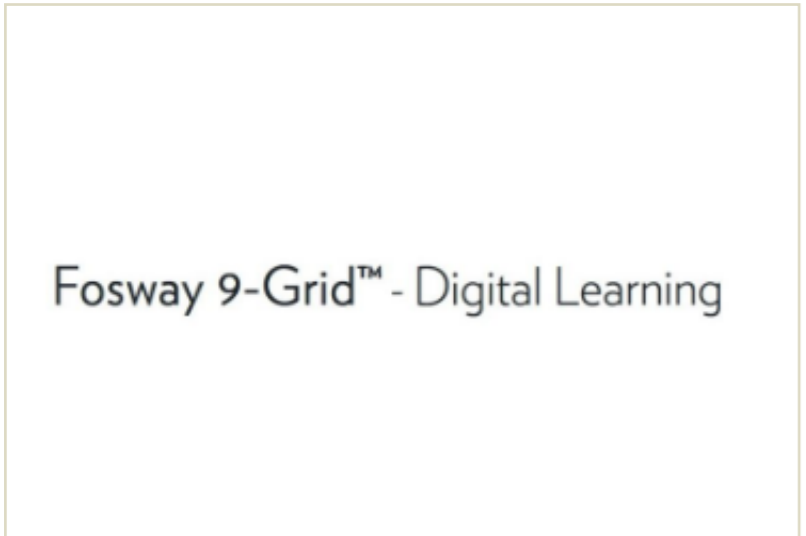
**2 ATD EXCELLENCE IN PRACTICE AWARDS**



**LPI ACCREDITED LEARNING PROVIDER GOLD STANDARD - 2016-2018**



**LEADER IN NELSON HALL LEARNING BPS NEAT EVALUATION**



**FOSWAY 9-GRID DIGITAL LEARNING STRATEGIC CHALLENGER 2019**



**TOP 20 COMPANIES IN TRAINING OUTSOURCING 2008-2019**



**TOP 20 COMPANIES IN CONTENT DEVELOPMENT 2011-2018**



**TOP 20 COMPANIES IN GAMIFICATION 2014-2018**



**TOP 20 COMPANIES IN IT TRAINING 2008-2010, 2013-2018**



**CLO LEARNING ELITE 2014-2018**



**DATAQUEST 'TOP IT TRAINING COMPANY' AWARD FOR THE 20TH CONSECUTIVE YEAR**



**NIIT NGURU AWARDED AS "BEST INTERACTIVE SOLUTION PROVIDER" BY ASSOCHAM**



**RANKED 4TH BEST COMPANY TO WORK FOR IN INDIA. NO 1 IN EDUCATION AND TRAINING**



**HIGHEST RATED TRAINING BRAND IN THE BRAND TRUST REPORT**



**TIMES ASCENT T&D AWARD FOR THE MOST INNOVATIVE LEARNING PARTNER FOR ENTERPRISES.**



**MOST INNOVATIVE LEARNING PARTNER FOR ENTERPRISES AT "EDUMEET 2018 & EDUCATION EXCELLENCE AWARDS" ASSOCHAM, INDIA**



# Corporate Learning:





NIIT CORPORATE LEARNING  
GROUP

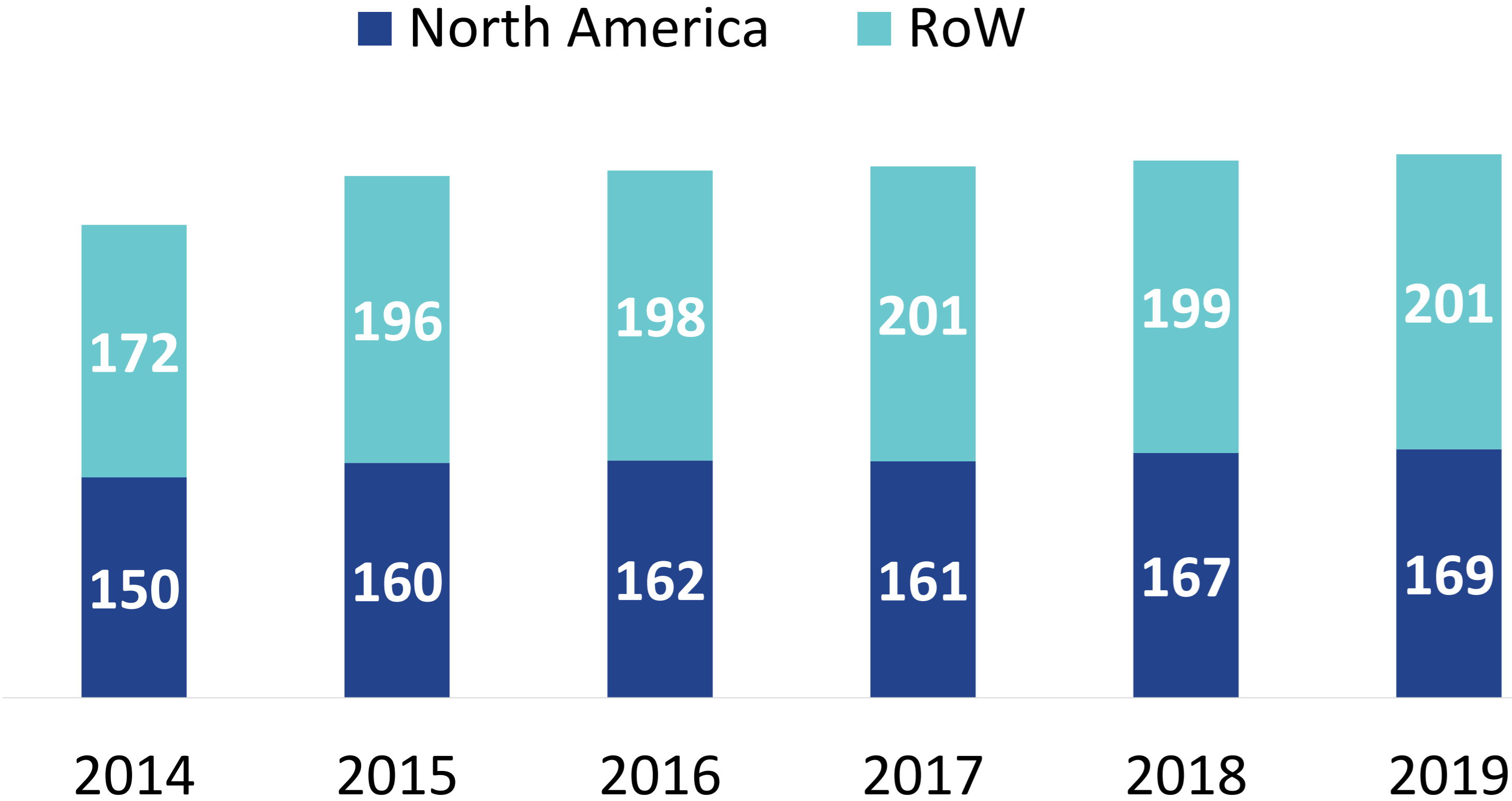
We help clients  
run training  
like a business.

A Vision for Transforming L&D





# Global Spending on Corporate Training: USD 370 Billion Opportunity



Direct Expenditure As Percentage of Revenue

**1.16%**

Direct Expenditure As Percentage of Payroll

**3.3%**

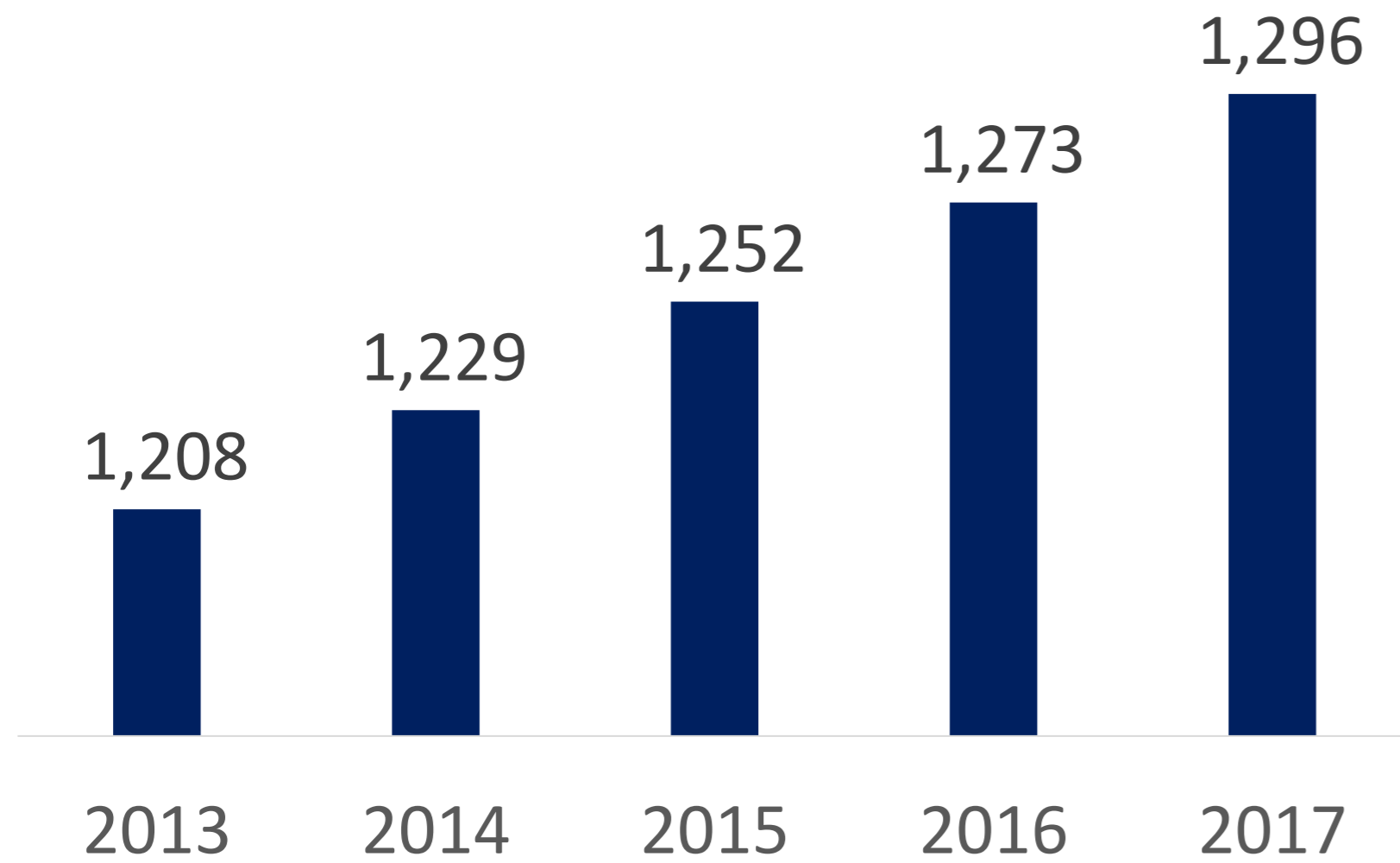
Spend on Customized Training

**~70%**

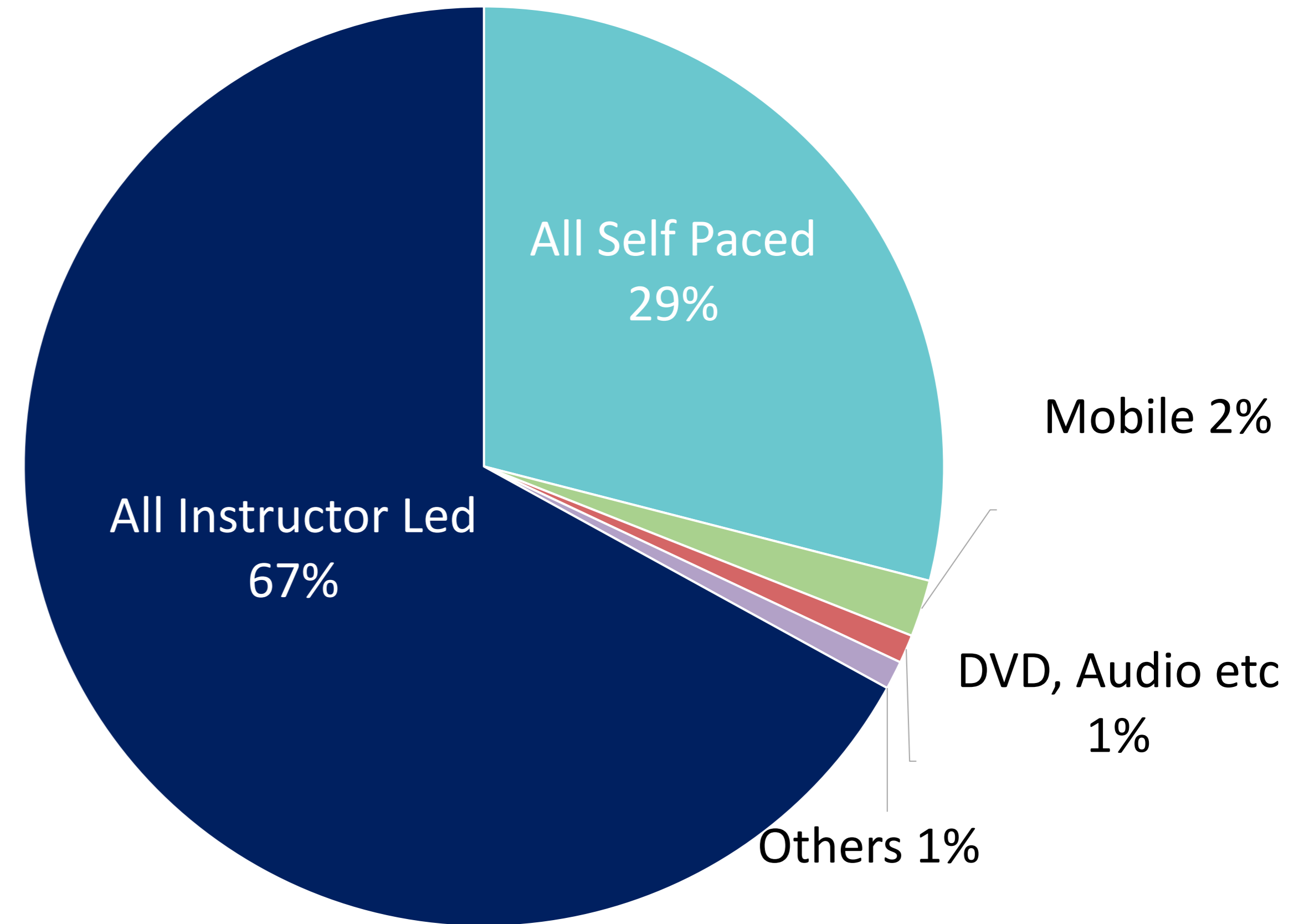
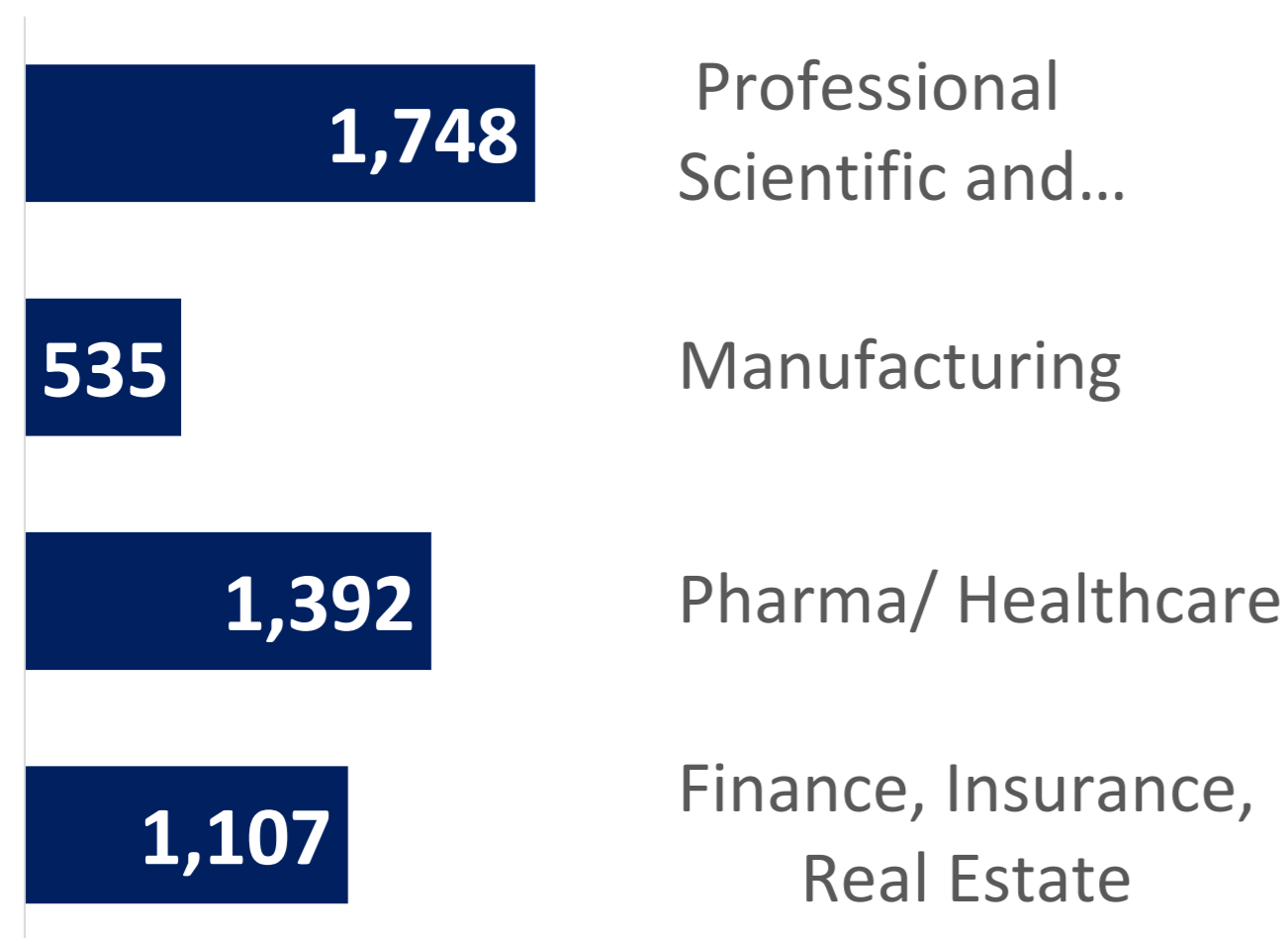
Source: ATD, TrainingIndustry.com



**Average Annual Spending Per Employee (USD)**



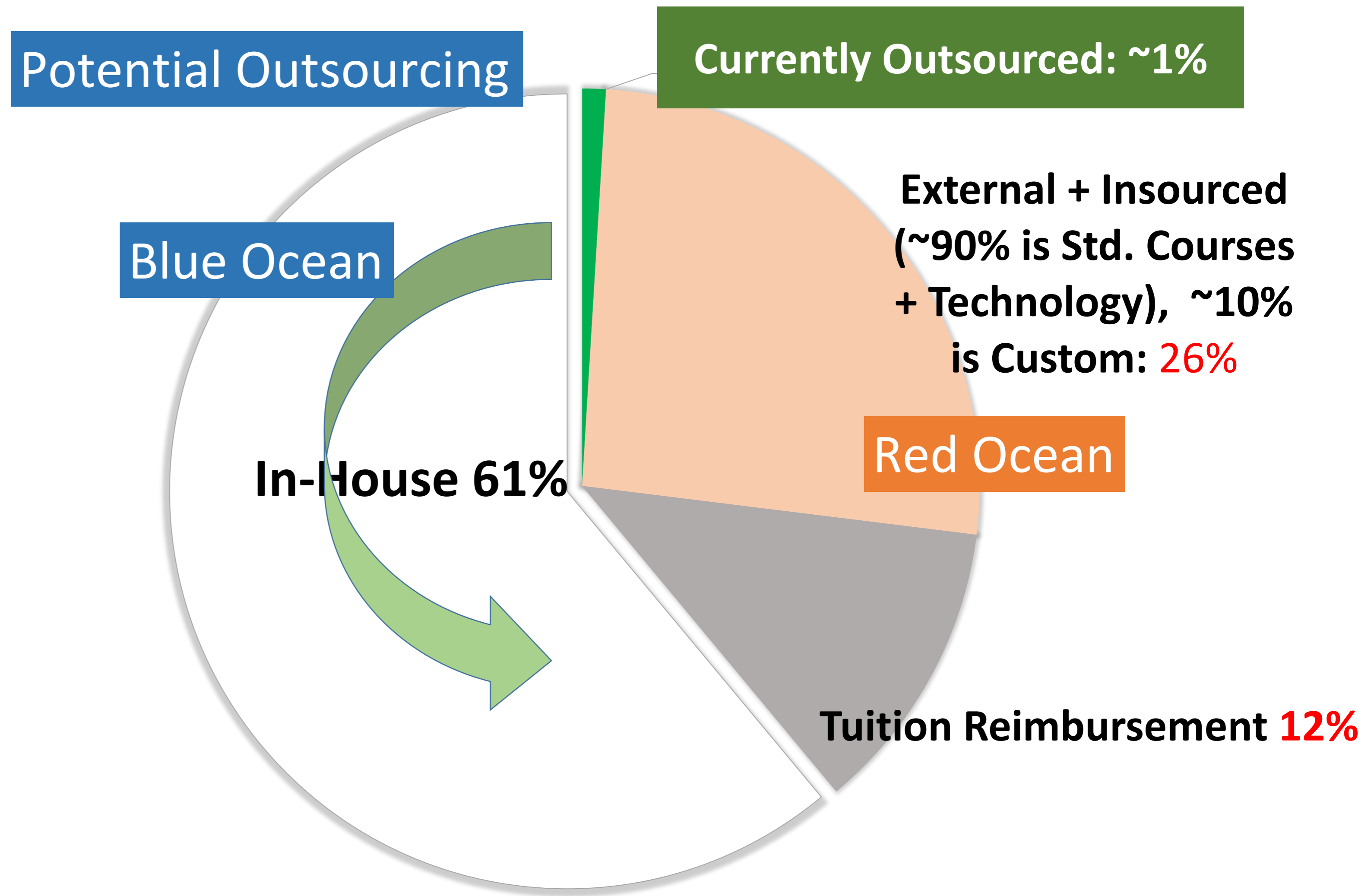
**Average Spend Per Employee by Industry (USD)**





# Training Outsourcing: Poised For Growth

- Less than a fifth of Fortune 1,000 Companies have outsourced training (Early Adopters)
- USD 370 Billion annual spends with **61% of the spending on in-house resources**
- **This is NIIT's Target Market**
- Increasing trend of Outsourcing to training specialists
- Large headroom available in existing customers





# CLG: Managed Training Services with Long Term Annuity Contracts



**21K**  
Hours of custom programs developed and delivered annually

**500**  
Full time instructional designers

**25**  
Localization Services in 25 Languages

**9M**  
Administrative Transactions Processed Annually

**150K**  
Training Days delivered annually

**30+**  
Global training delivery in 34 countries in 15 languages

**2500**  
Global Network of 2500 instructors

**150+**  
Industry Honors and Awards



# CLG: Marquee Customers



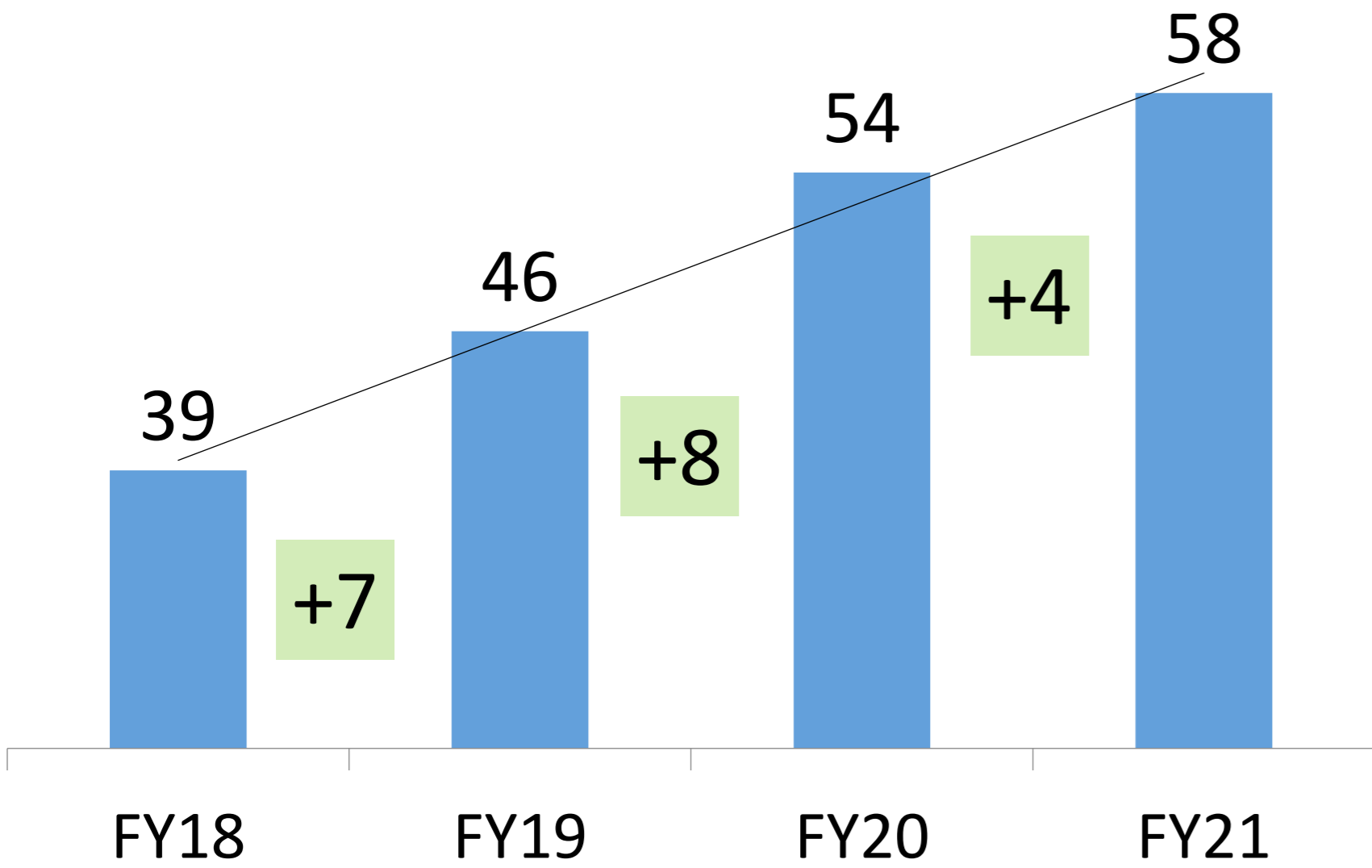
\*Selected customers



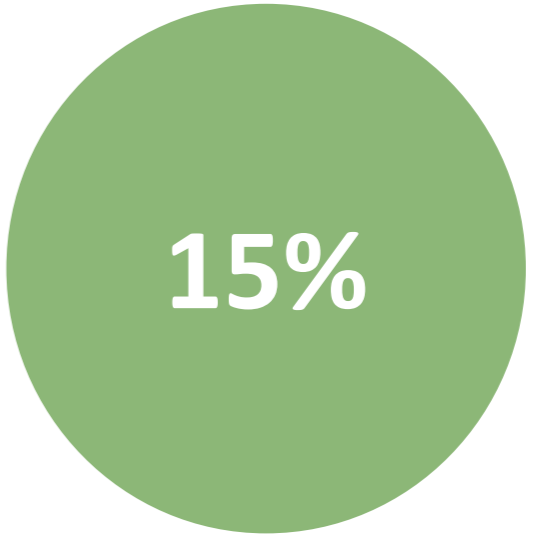
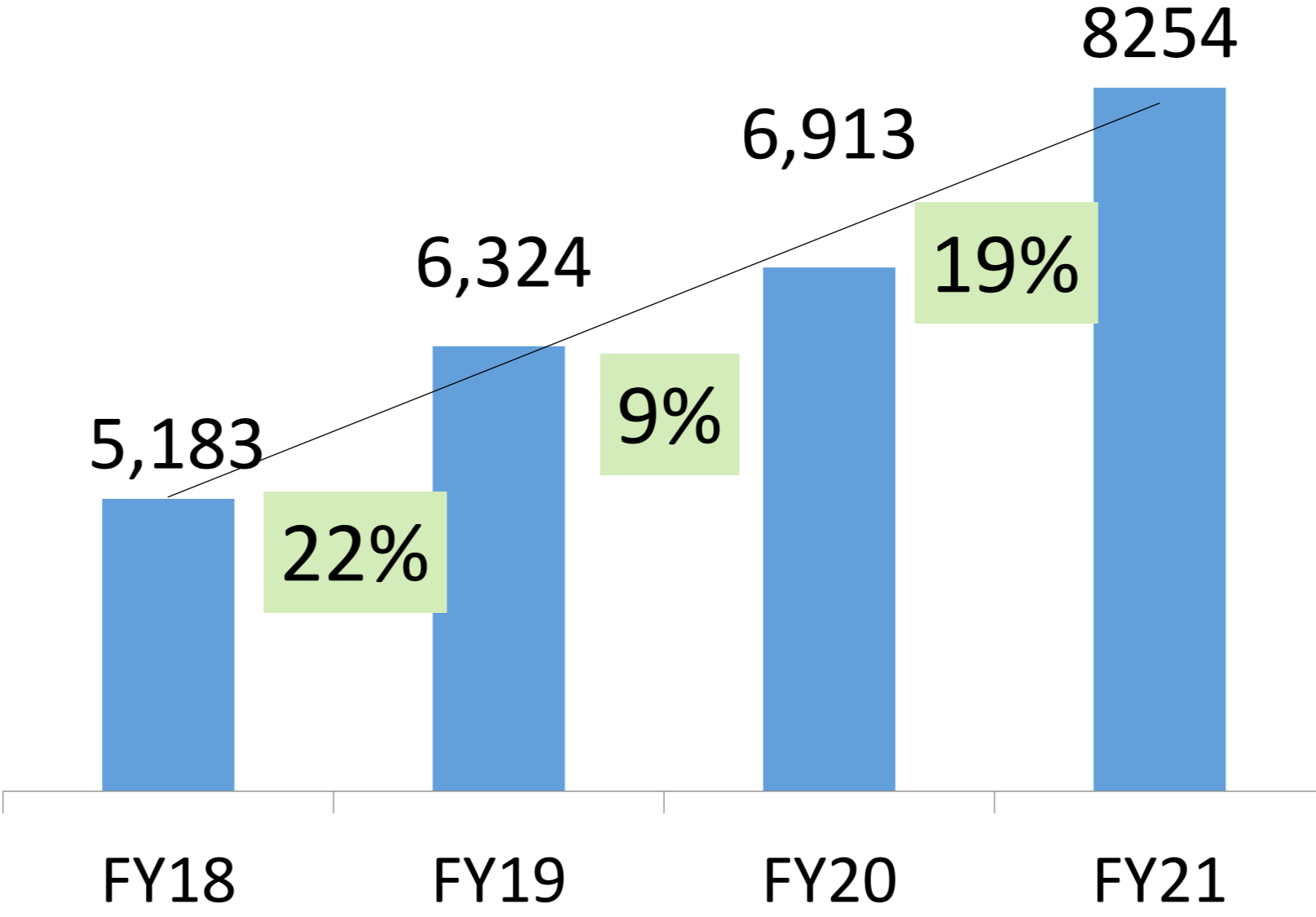
# CLG: Consistent Track Record



### No of MTS Customers



### CLG Revenue (Rs Mn)



**10 Year CAGR**



**EBITDA Margin**

Strong Deal Flow:  
14 New Logos FY20, 9 in FY21

Strong Revenue Visibility:  
\$287 Mn from Existing Contracts

Strong Balance Sheet and High ROCE

Uniquely positioned to benefit from Current Environment



# NIIT: Proven Learning Outcomes



30%

NIIT's application rollout training for Shell Primavera has helped reduce time to proficiency in application training for planners by 30% in 22 locations worldwide.



20%

20% increase in average productivity and ticket size of business sold across 30 countries with 10% higher retention over 1 year for Sales Associates supported by the NIIT enabled Global Partner Learning Solutions program.



15M

29.4% reduction in course length with a 16 Day reduction in time to proficiency for NIIT's Auto New-Hire Pipeline Reinvention course. The cost of labor redirected to productivity gains is \$4.3 million in total to date with projected savings of \$15 million over 12 months.



24%

24% reduction in time to competency and 48% reduction in the direct cost to company on compensation because of NIIT's onboarding program for IQVIA.



4M+

NIIT's Rails blended learning program for mine train drivers in Australia has returned over 4 million dollars in reduced training costs.



NIIT SKILLS AND CAREERS

# Shaping Future Skills And Careers

Transforming the Workforce of Tomorrow





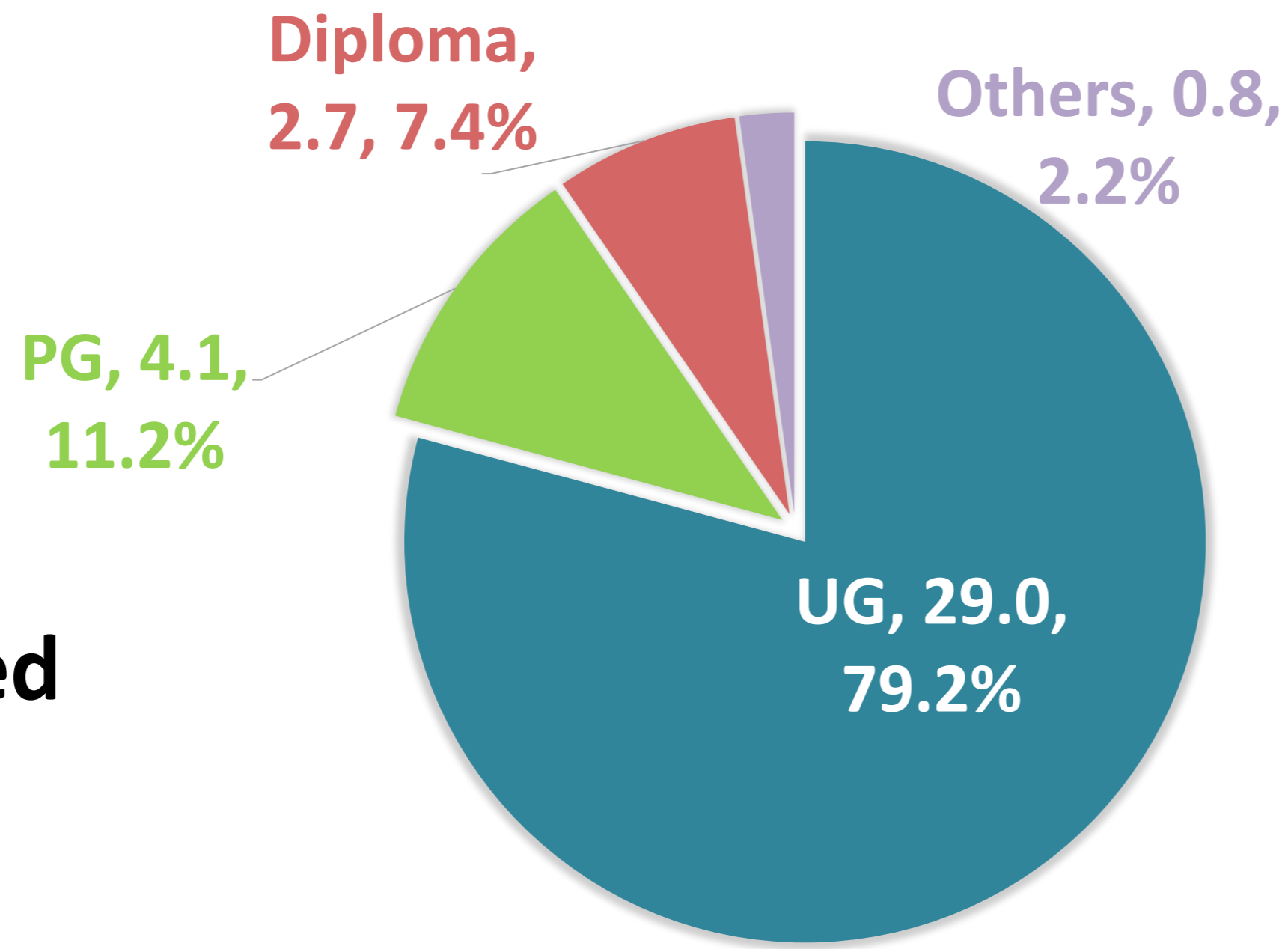
**39,050**  
Colleges

**903**  
Universities

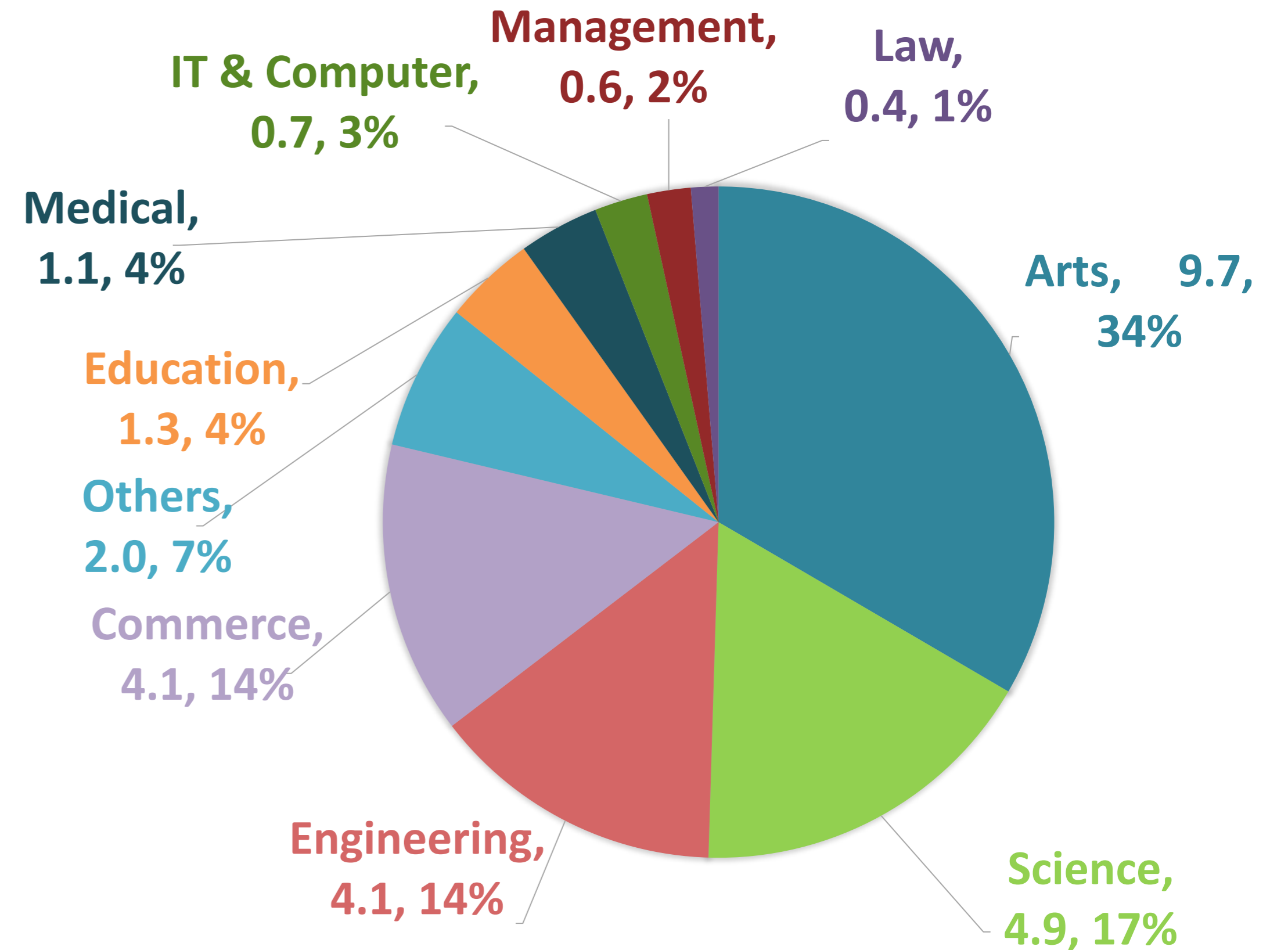
**36.6 million**  
Students Enrolled

**25.8%**  
GER

## Enrollment by Level



## UG Enrollments by Stream



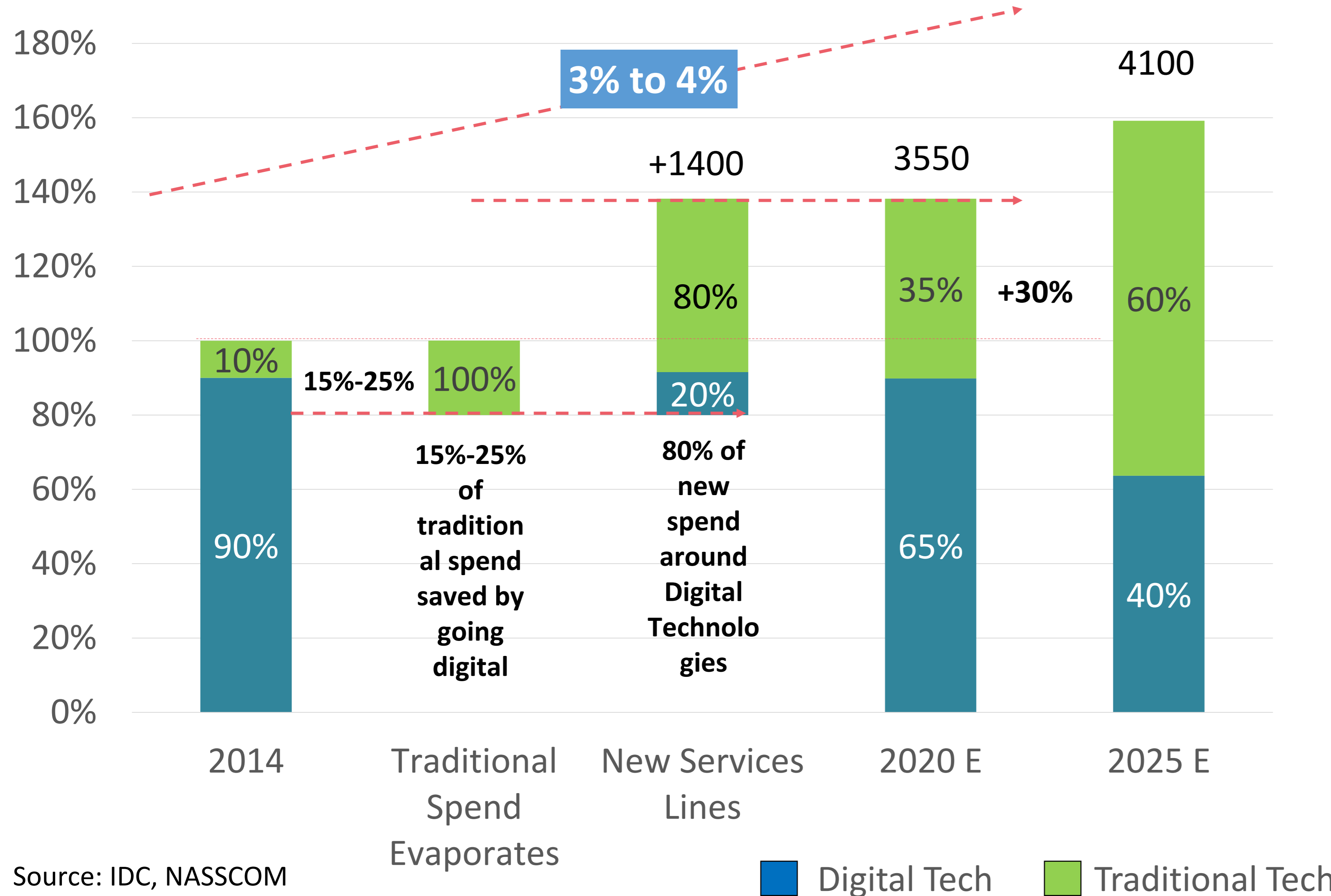
Source: AISHE 2017-18



# SNC: Digital Transformation – IT Sector



Global Technology and Business Services Spend



Digital growing at 30% (1.5x faster than global digital growth rates) and now ~20% of Industry Exports.

Global Technology and Business Services to Touch USD 4 Trillion by 2025

Share of Digital Technologies to increase to 60%

50% - 60% of today's workforce needs to be reskilled to be relevant by 2020

Source: IDC, NASSCOM



# SNC: Digital Opportunity Landscape



Future is “Digital@Scale

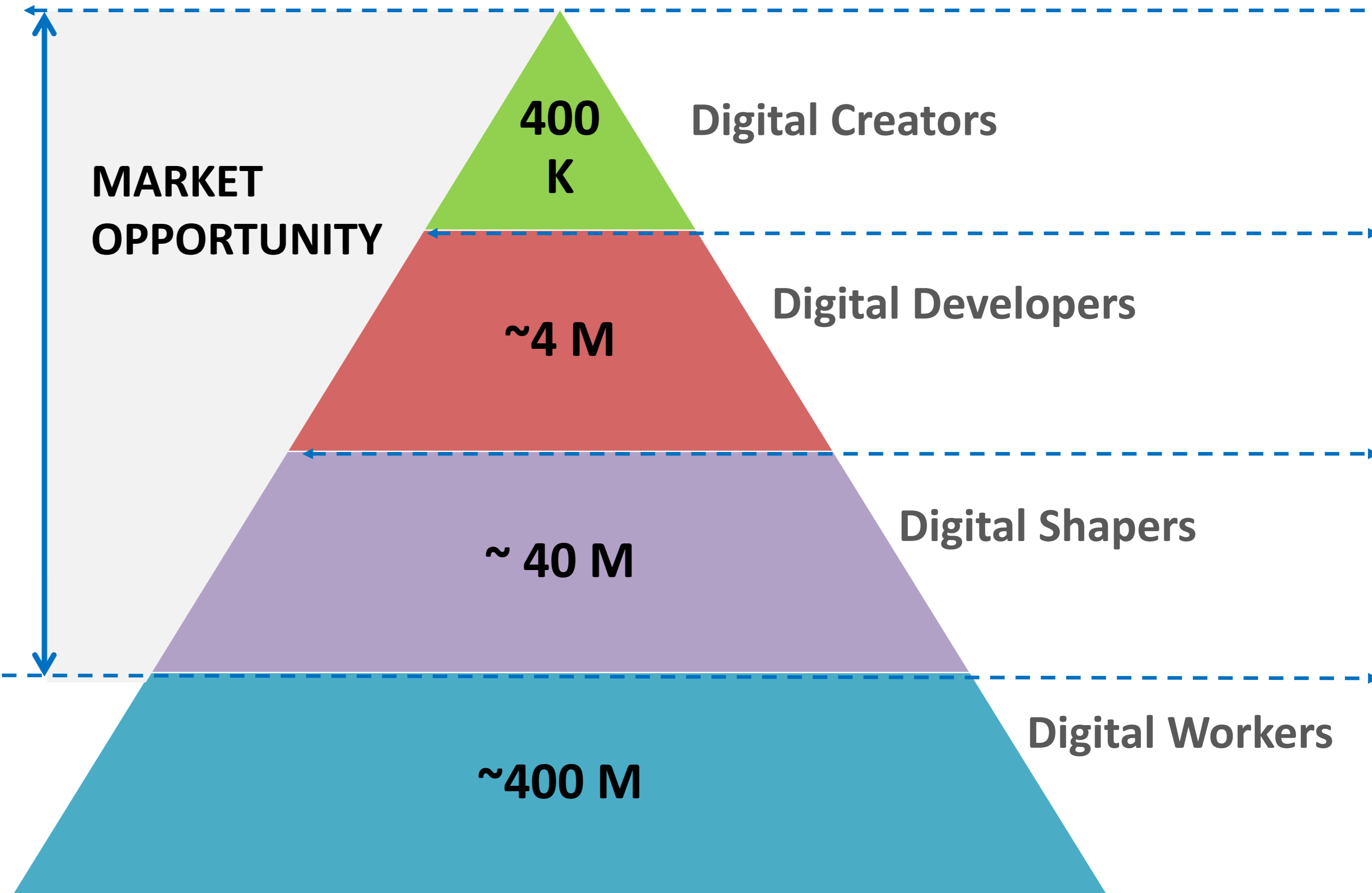
Digital becoming all pervasive, blurring IT industry sector boundaries

Digital projects more skill intensive than people intensive

People need continuous reskilling with consulting and design capabilities

Accelerating influx of new GICs; 1140+ nos.

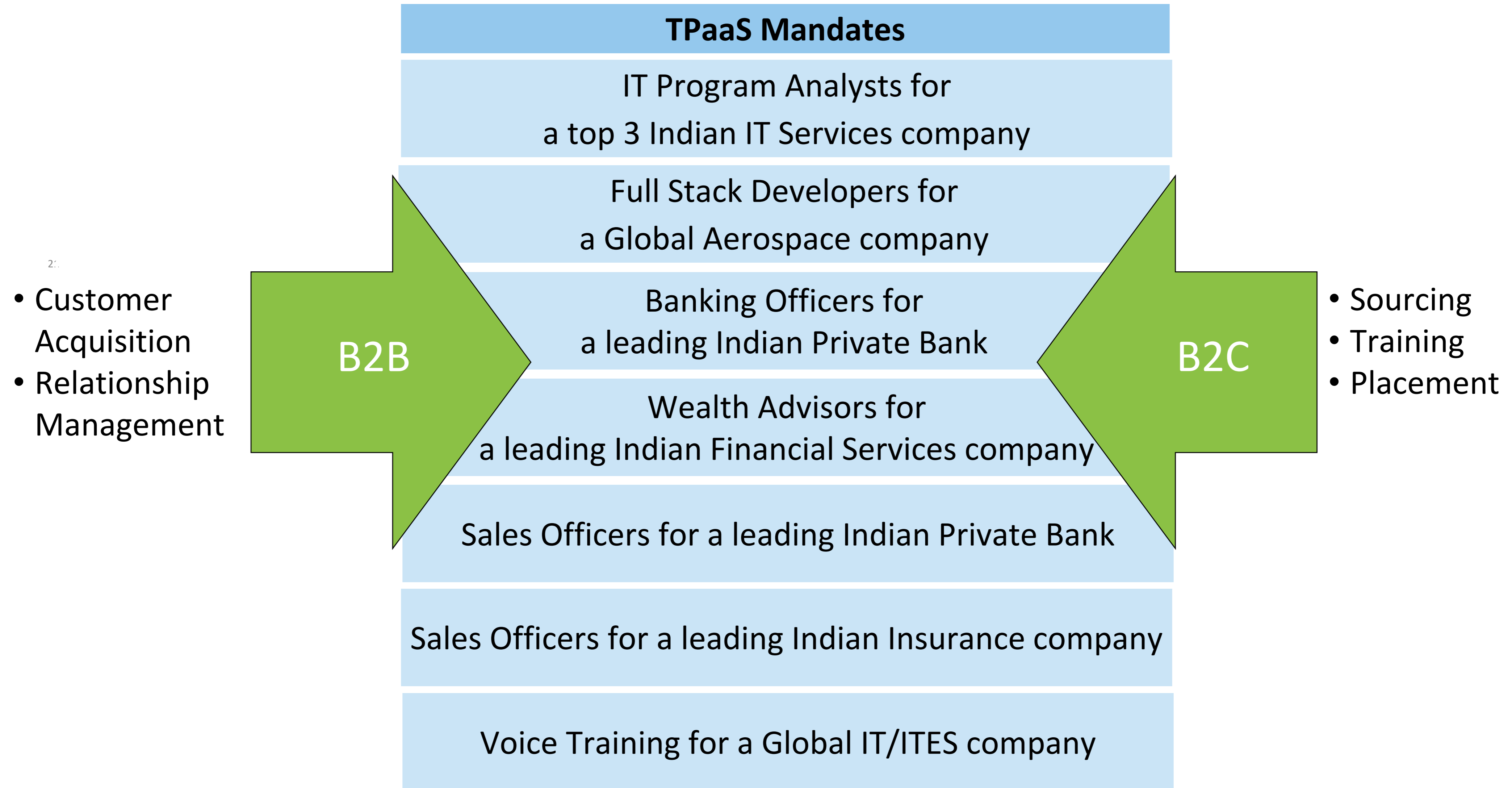
India emerging as key hub for Digital@scale













The NIIT logo consists of the letters "NIIT" in a bold, white, sans-serif font, centered within a dark blue circular background. The background of the entire slide is a blue-tinted cityscape at night, featuring a prominent skyscraper with a golden spire and a complex highway interchange with light trails from traffic.

**NIIT**

You can't spell TRAINING without NIIT.