



# NIIT Limited: Company Overview

September 2020



**Company Overview**

**Future Direction**



# NIIT: At a Glance



**38**

YEARS OF  
EXPERIENCE

**30+**

COUNTRIES  
WORLDWIDE

**2533**

NIITIANS

**2**

LINES OF BUSINESS

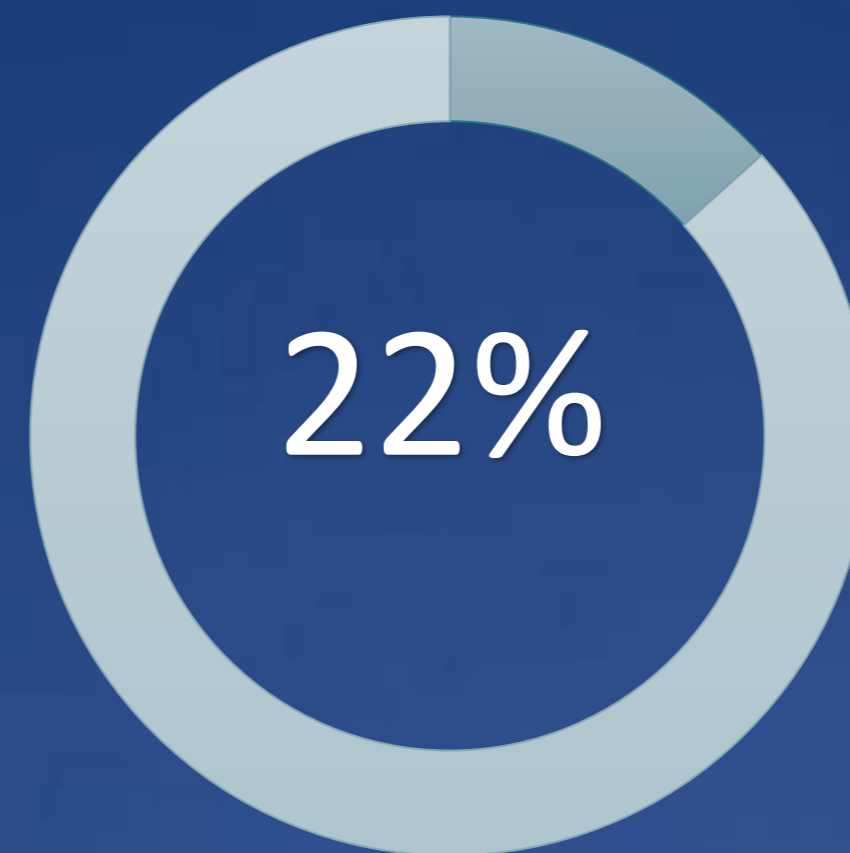
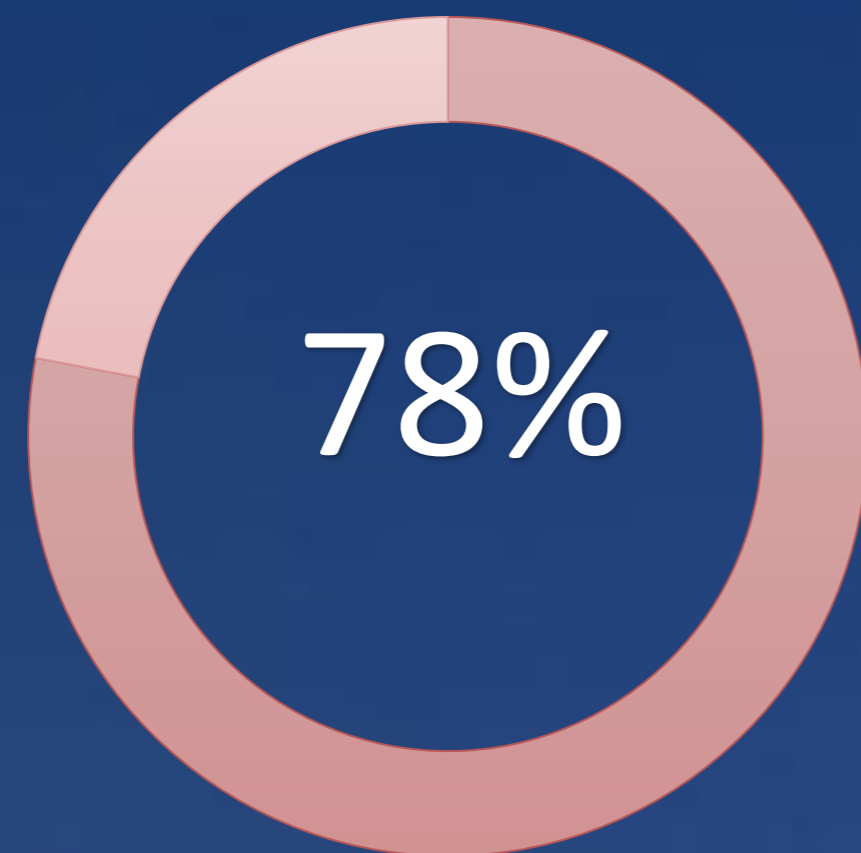
**38+**

MILLION  
LEARNERS  
TRAINED



HQ IN GURGAON,  
INDIA

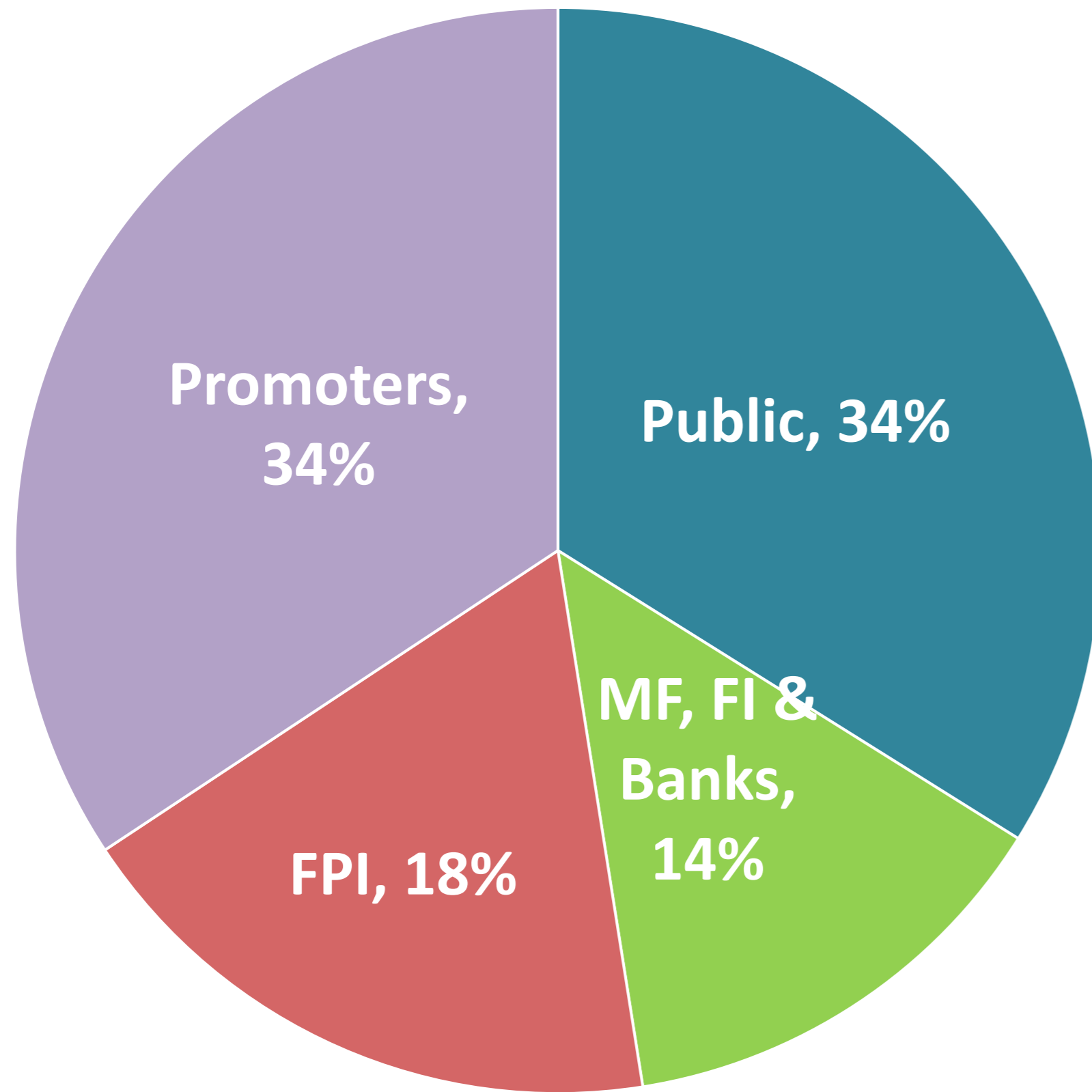




<b>CORPORATE LEARNING GROUP (CLG)</b>	<b>SKILLS &amp; CAREERS GROUP (SNC)</b>
INR 6,913 MILLION	INR 1,979 MILLION
Productivity	Employability
North America, Europe, Oceania	India, China, Africa
Managed Training Services Application Rollout Training Learning Advisory Custom Projects	Deep Skilling in IT, BFSI, and Others Service Sector Skills Talent Pipeline as a Service Professional Life Skills

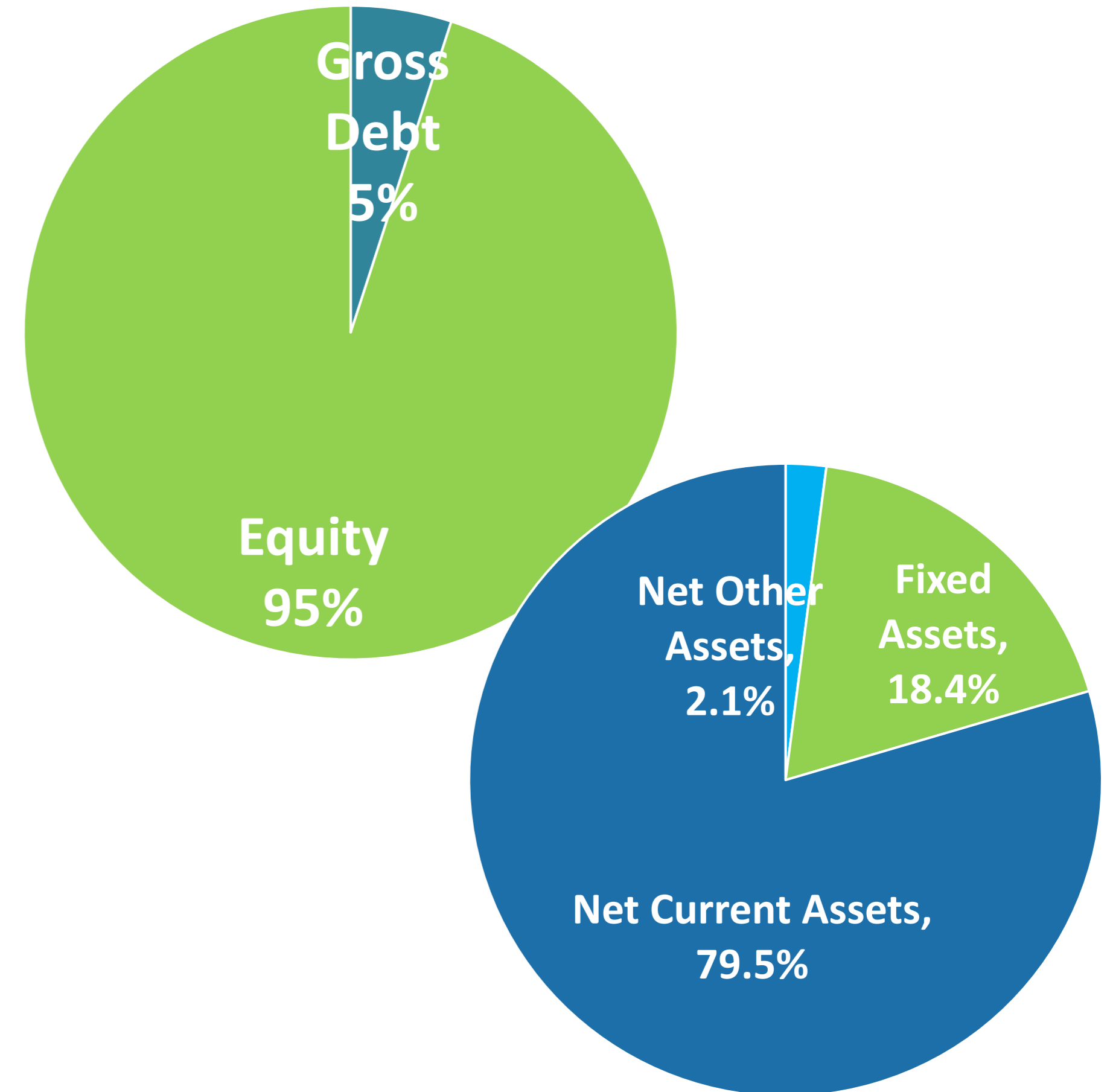


## SHAREHOLDING



No of Shares: 141.5 million

## TOTAL CAPITAL 16,362 MILLION



Net Current Assets include Cash and Bank Balances of Rs 12,876 million

# NIIT: Awards and Recognition



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



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



**3 LEARNING TECHNOLOGIES UK AWARD**



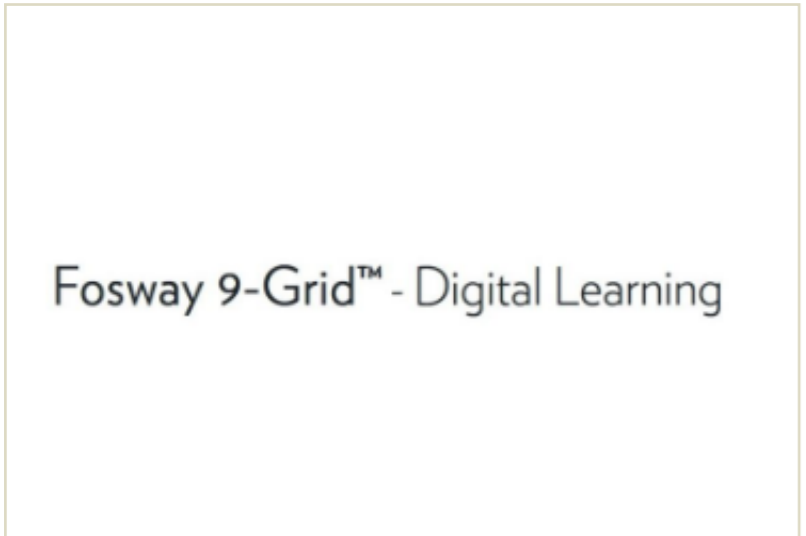
**2 ATD EXCELLENCE IN PRACTICE AWARDS**



**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**



# CLG: Managed Training Services with Long Term Annuity Contracts



**CUSTOM CONTENT  
AND CURRICULUM  
DESIGN**

**LEARNING  
DELIVERY**

**LEARNING  
ADMINISTRATION**

**STRATEGIC  
SOURCING**

**LEARNING  
TECHNOLOGY**

**ADVISORY  
SERVICES**

**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





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.



# Corporate Learning: Future Direction





NIIT CORPORATE LEARNING  
GROUP

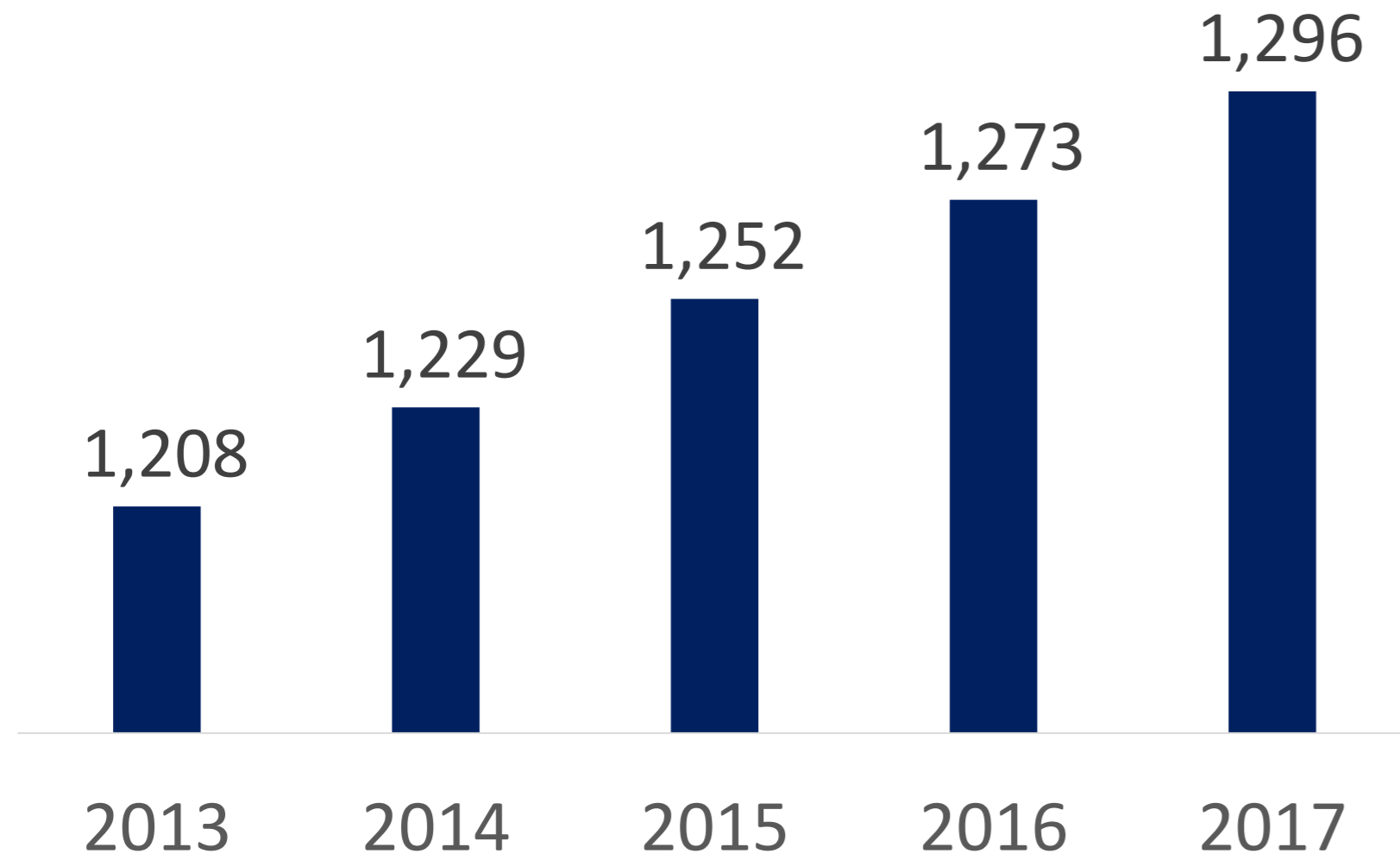
We help clients  
run training  
like a business.

A Vision for Transforming L&D





### Average Annual Spending Per Employee (USD)



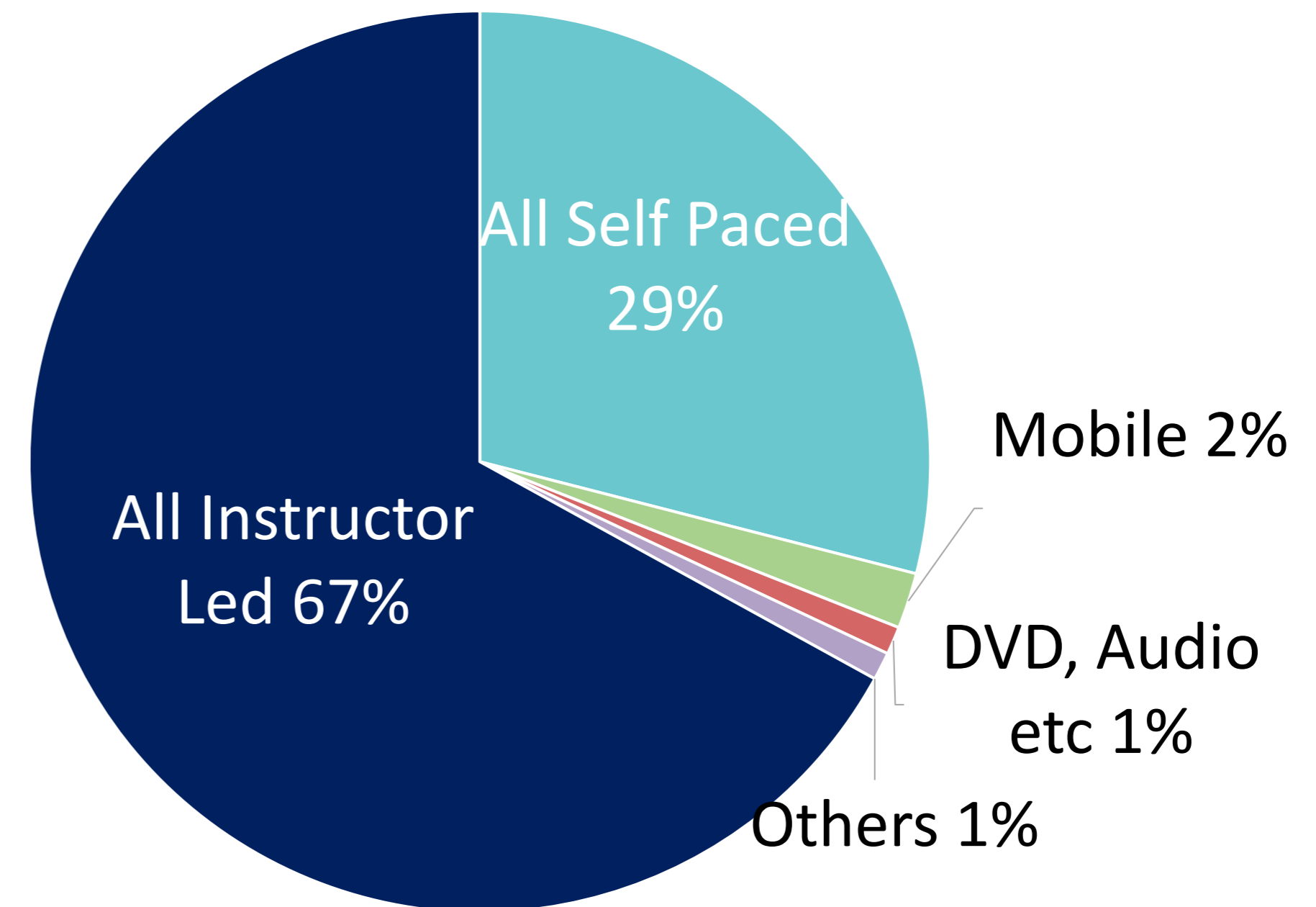
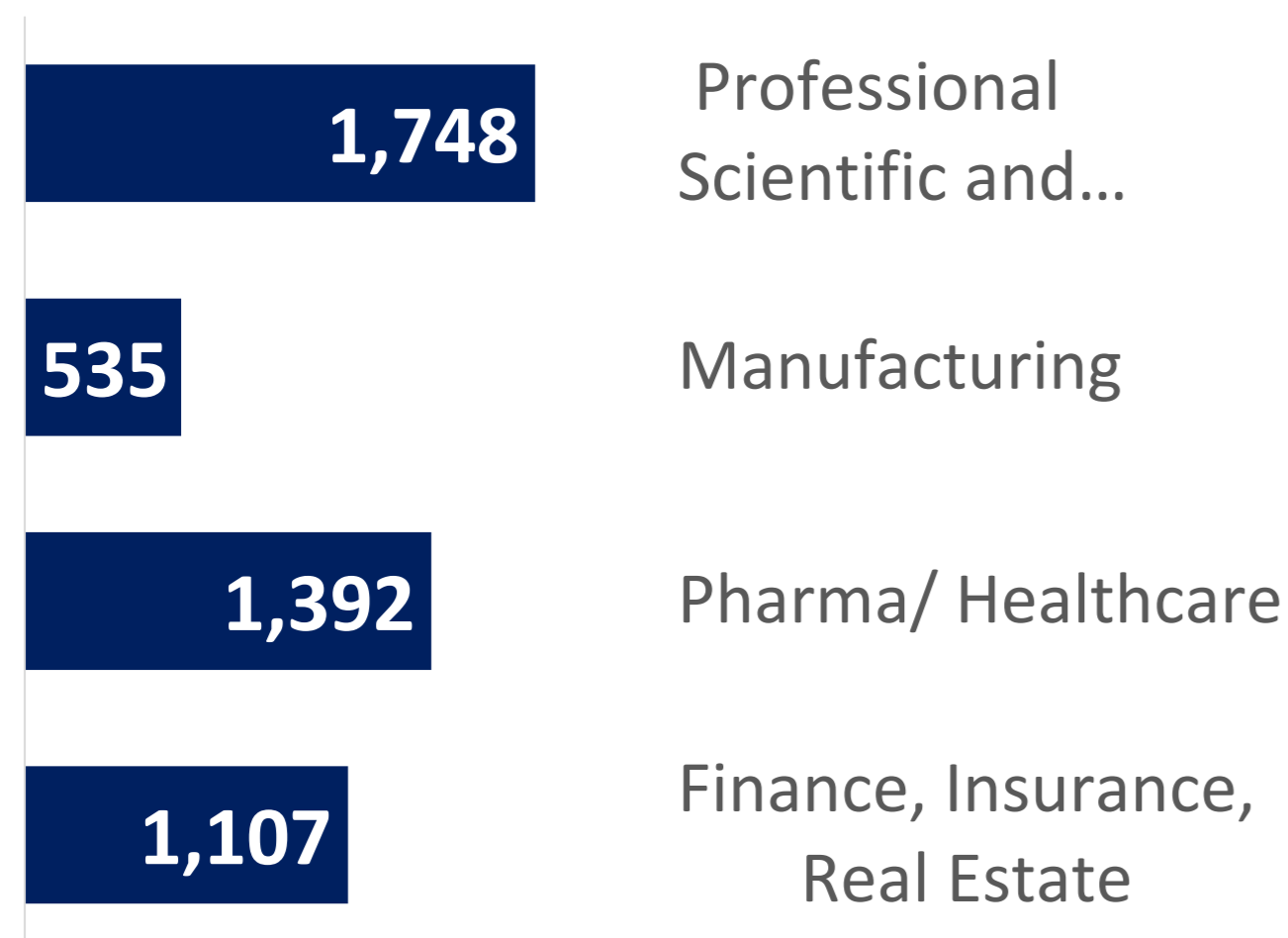
### Direct Expenditure As Percentage of Revenue

**1.16%**

### Direct Expenditure As Percentage of Payroll

**3.3%**

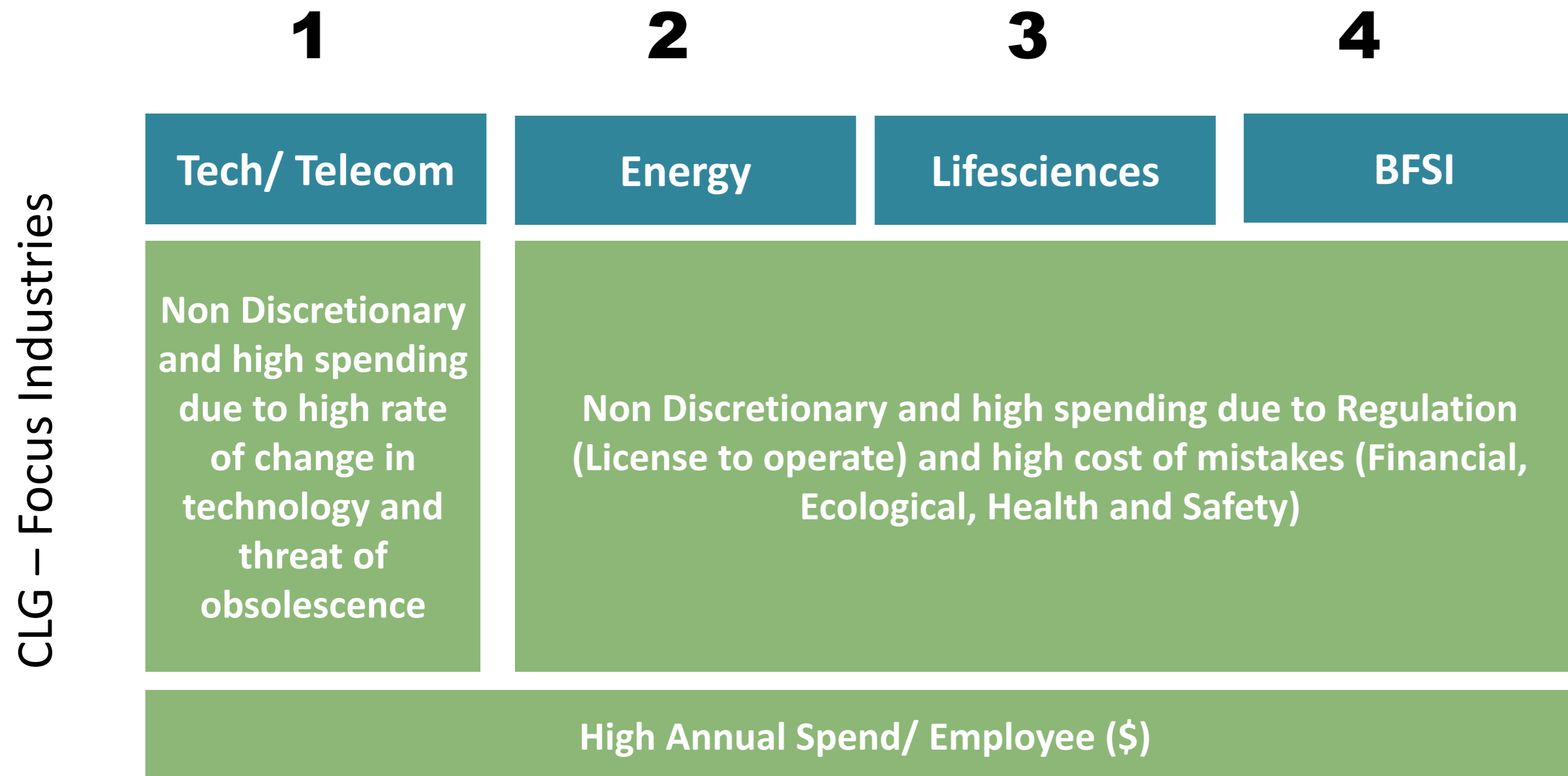
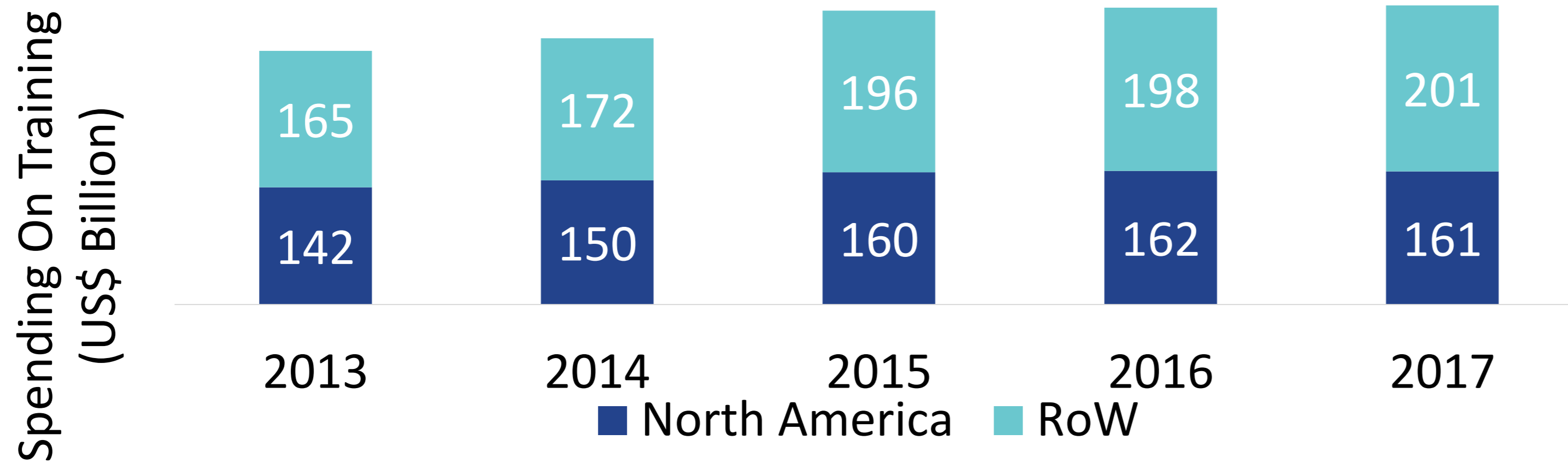
### Average Spend Per Employee by Industry (USD)



Source: ATD



# CLG: Corporate Training Spending



The Corporate Training market represents \$300+ billion opportunity

Spending on Training Continues to Grow

Increasing trend towards outsourcing. Less than 5% penetration

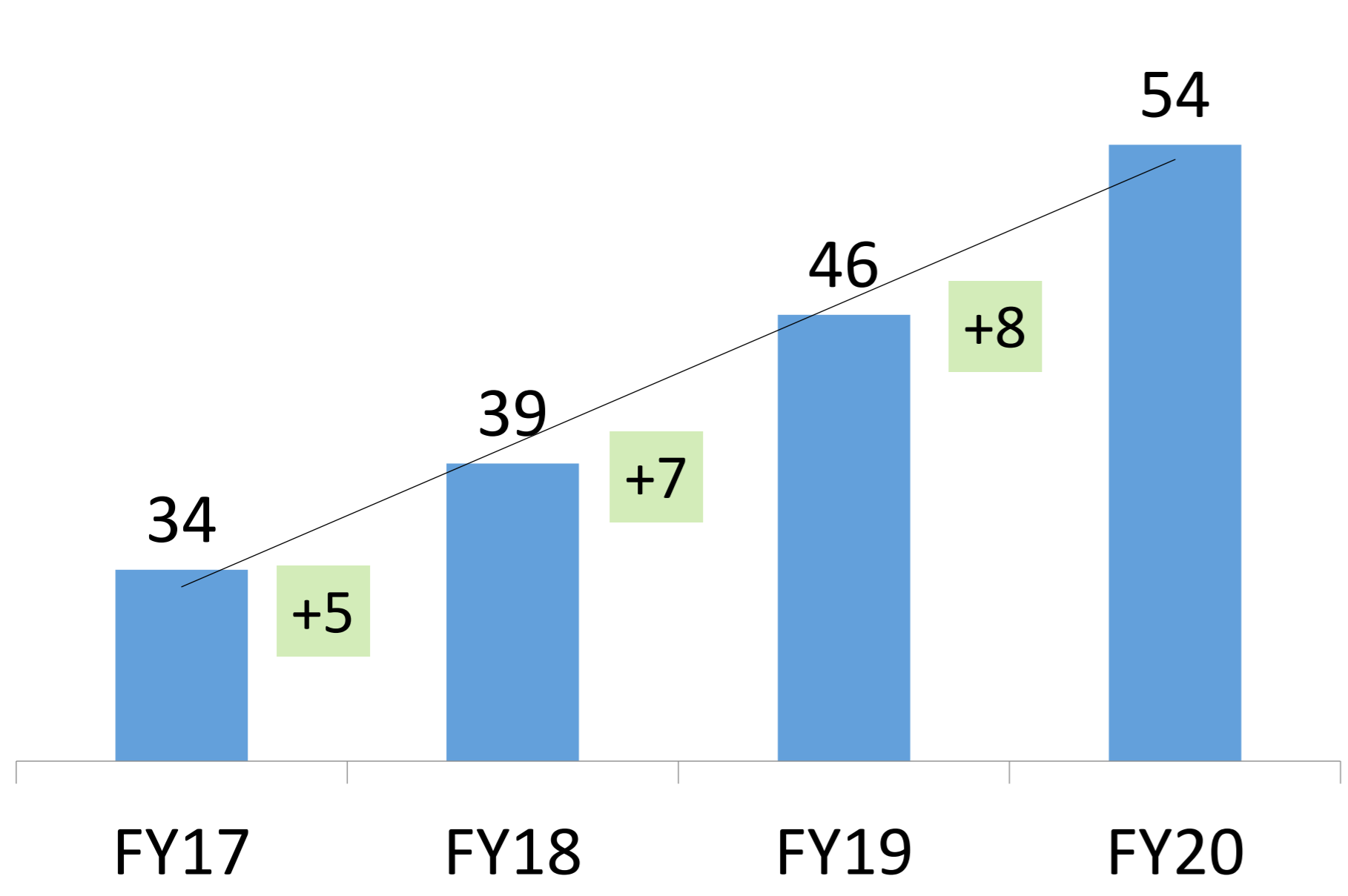
Focus on Technology/Telecom Energy, Lifesciences and BFSI Industries

Source: Statista.com Bersin By Deloitte, ATD

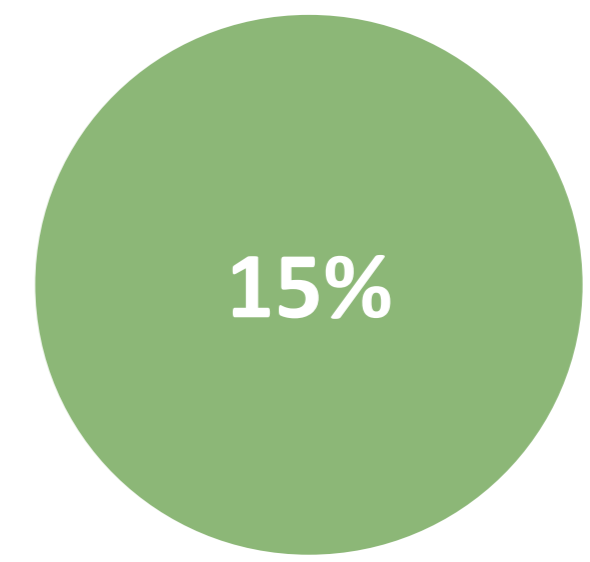
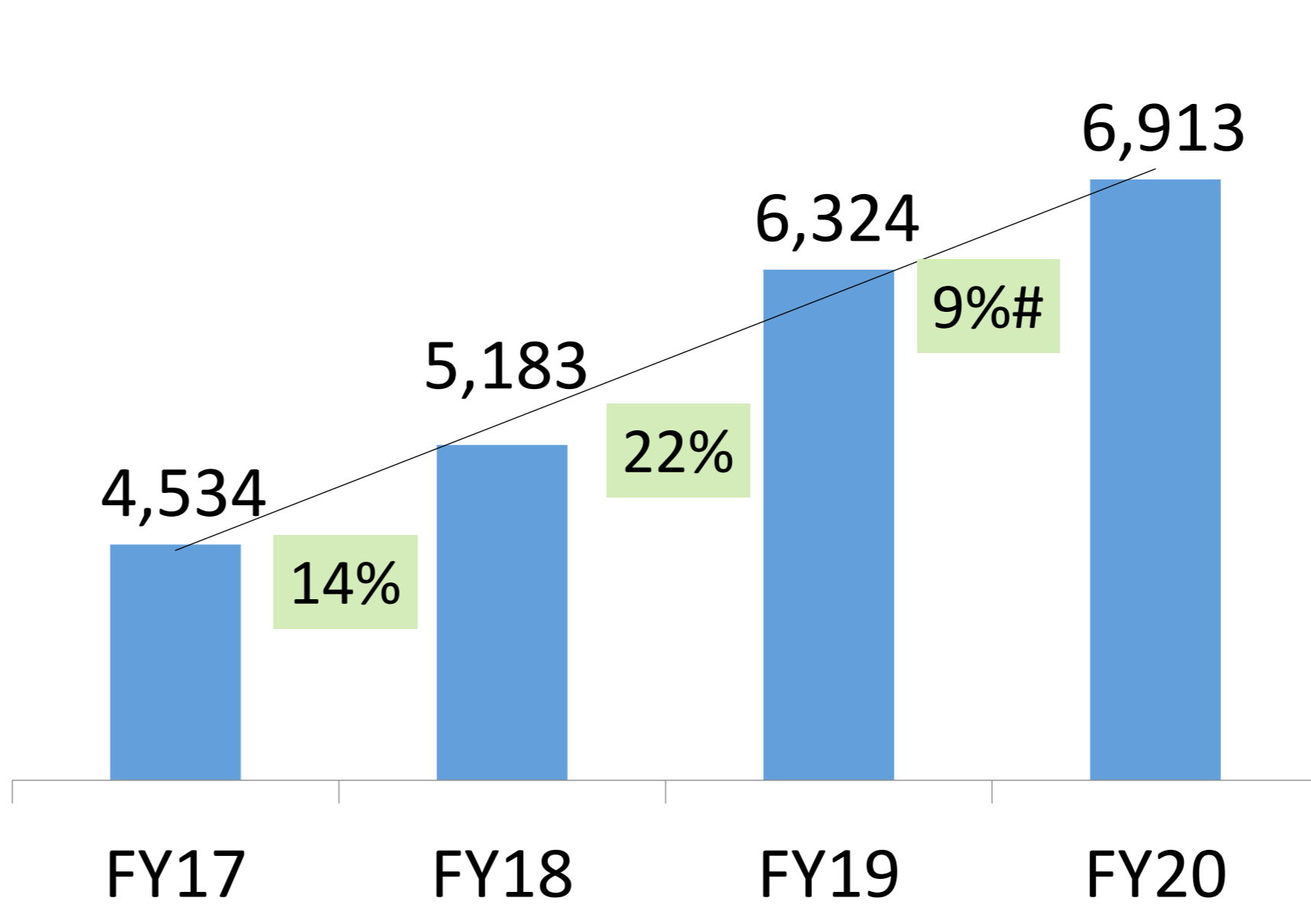


# CLG: Consistent Track Record

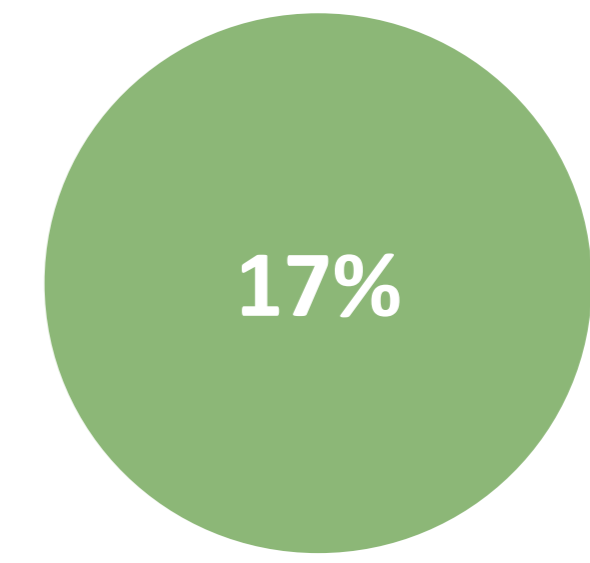
No of MTS Customers



CLG Revenue (Rs Mn)



Revenue CAGR Since FY11



EBITDA Margin\*

Strong Deal Flow:  
14 New Logos FY20,  
3 in Q1 FY21

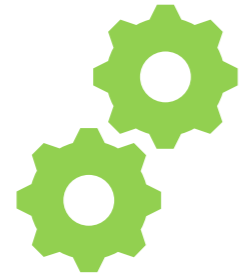
Strong Revenue Visibility:  
\$263 Mn\*  
from Existing Contracts

Strong Balance Sheet  
and High ROCE

Uniquely positioned  
to benefit from  
Current Environment

#Including Covid Impact, \*Q1 FY21





## PRODUCTIVITY

Step up people productivity and optimization of effort & resources through automation and tools

**Improve margins for NIIT**



## ACCELERATE DEAL FLOW

Investments in S&M  
Contract Expansion with Existing Customers  
Improve Win Rates

**Higher Sales Productivity**



## COMPREHENSIVE ENGAGEMENTS

Domain expertise  
Global delivery capability  
High Capability and Service Maturity  
Big ticket annuity contracts

**Improve Book to Bill ratio**

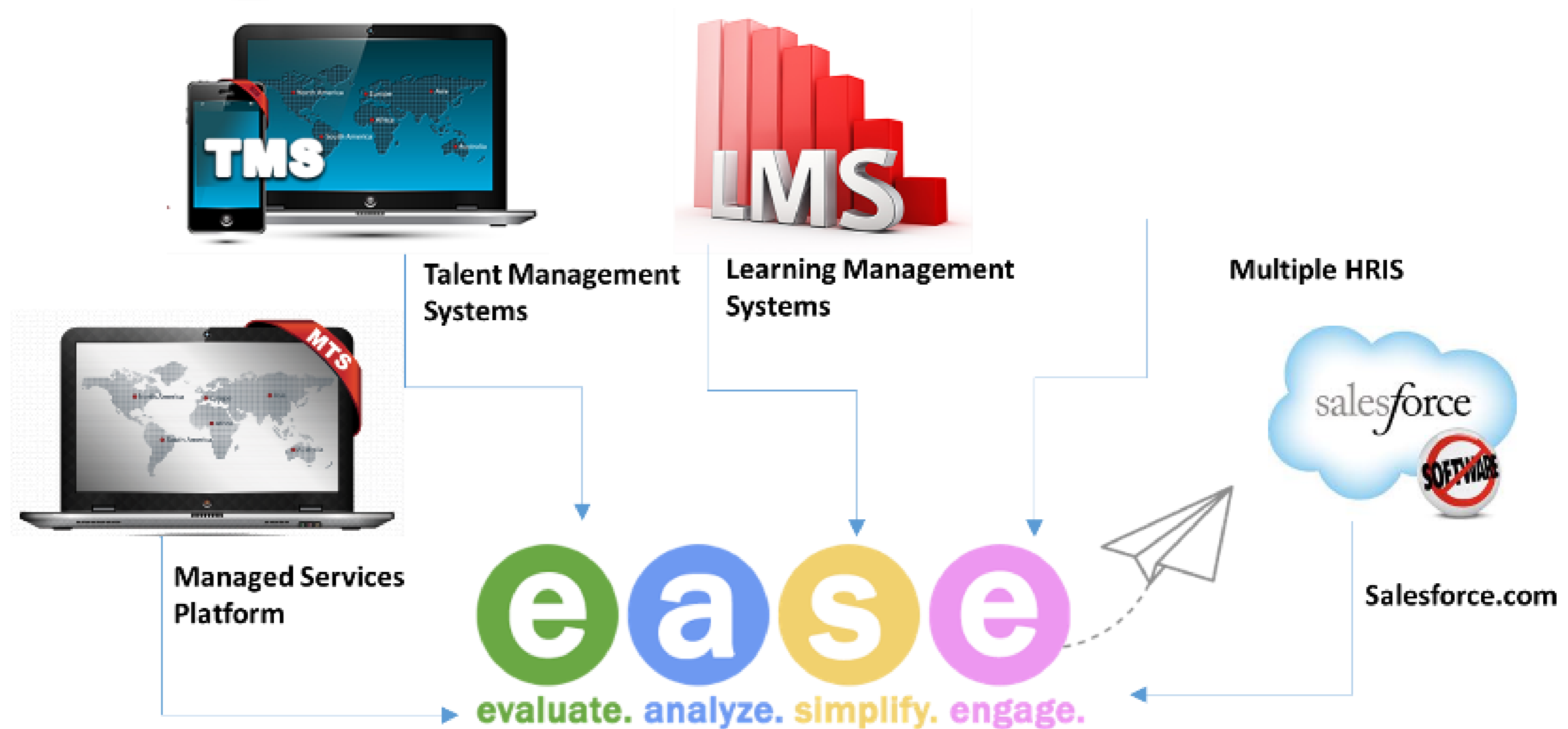
**Driving Scale and Profitability For CLG**



Customer Demand

“I need a one-stop shop to get all my data so that I can make business decisions. My LMS won’t give me this.”

NIIT Solution





The 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.