

HCLTech

High-Tech Industry Digital
Services 2023-2024
RadarView

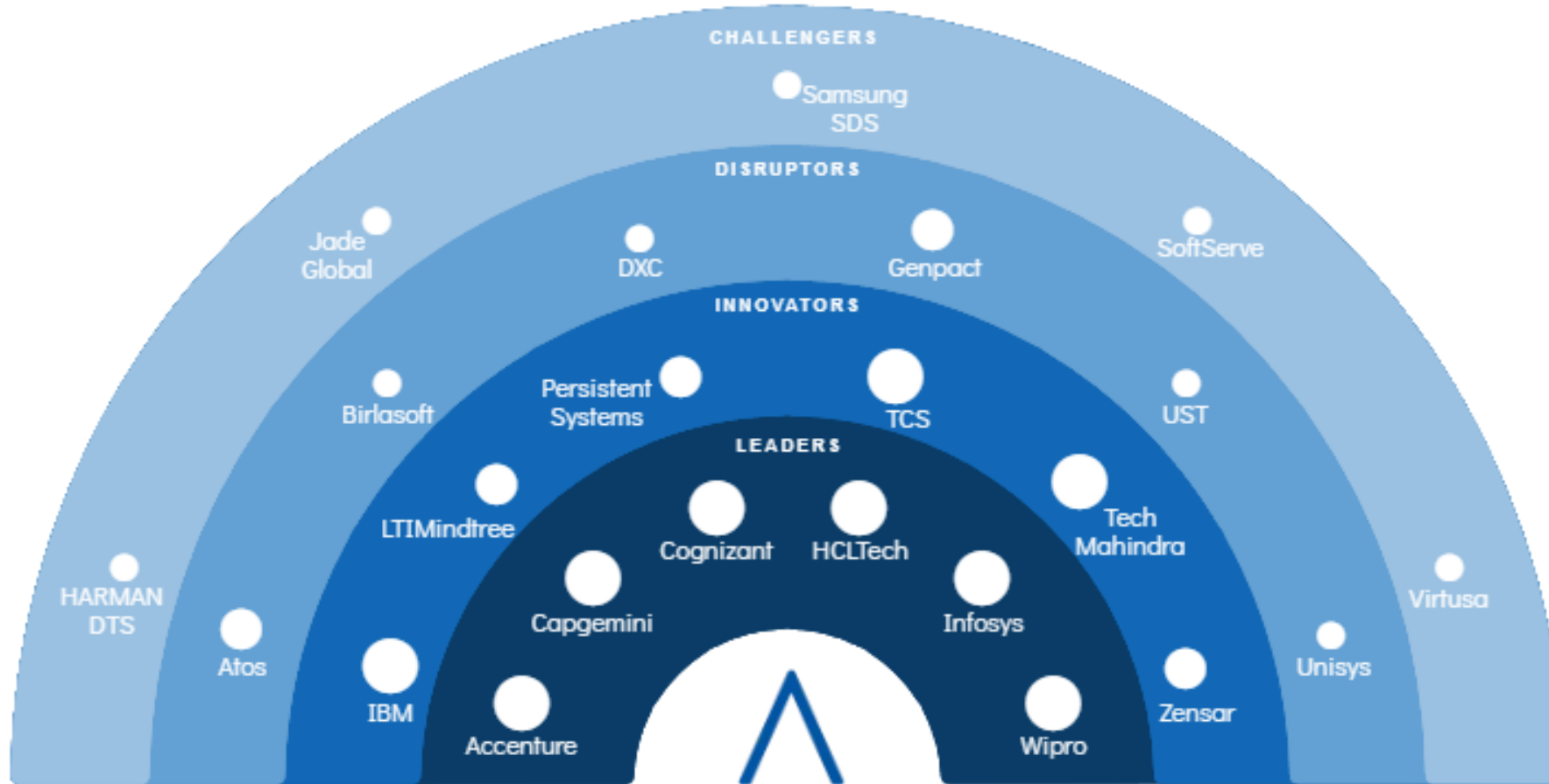
Service Provider Profile

July 2023

Avasant recognizes 23 top-tier service providers supporting the high-tech industry in digital transformation



Practice maturity ○ ○ ○



Note: Please refer to Avasant's *High-Tech Industry Digital Services 2023-2024 Market Insights* for a detailed analysis of the enterprises and demand-side trends.

HCLTech: RadarView profile



Practice overview

- Practice size: N/A
- Active clients: N/A
- Delivery highlights: 215+ delivery centers globally

\$1B - \$2B

Revenue from high-tech industry, FY 2023

>20%

YOY revenue growth from high-tech, FY 2023

Industry-specific solutions/offerings

ADvantage Commerce for Subscriptions	A framework to deliver digital subscription programs and offer a personalized buying experience
Remote Equipment Diagnostics	A framework to enable repair and provide remote diagnostics for semiconductor equipment
Digital twin for factory planning	A platform to offer 3D visualization of a factory, allowing layout planners to optimize CAPEX
Professional services-as-a-service	A framework to enable professional services capabilities for software vendors to reduce OPEX

Sample clients

- A social media company
- A US-based data company
- A US-based capital equipment company
- A Silicon Valley company
- A software company
- A US-based software company

- Practice maturity ★★★★★
- Investments & innovation ★★★★★
- Partner ecosystem ★★★★★

Leverages AR/VR to enable remote diagnostics of semiconductor equipment. Utilizes professional services-as-a-service to optimize margins for independent software vendors (ISVs).

Partnerships/alliances

Leveraged its Azure capabilities to help high-tech clients with engineering and operations	Established a joint GTM to improve the customer experience for high-tech clients using automation
Collaborated to help high-tech clients with data modernization using IBM Cloud Data Pak	Partnered for joint GTM to quicken digital transformation for high-tech clients using cloud technologies
Partnered to develop marketing-as-a-service solutions using Adobe Experience Cloud	Leveraged its hybrid/multicloud capabilities to support high-tech clients with digital transformation
Leveraged its data warehouse capabilities to offer scalable infrastructure to high-tech clients	Collaborated to enable business process transformation for high-tech clients using RPA

Service line coverage

Research and development
Supply chain management
Sales, marketing, and partnerships
Aftersales
Customer engagement
Corporate services

Darker color indicates higher industry concentration: ●●●●●

Case studies

Client	Capability	Summary	Business impact
A US-based data company	<ul style="list-style-type: none"> Analytics Cloud IA 	<ul style="list-style-type: none"> The client wanted to modernize its existing analytics system, design end-to-end data workflows, and migrate to a cloud-based analytics system. HCLTech leveraged its ADvantage Migrate framework and accelerators for the enterprise data warehouse to migrate the existing analytics system to a Snowflake-enabled data warehouse and cloud analytics system. It automated the data reconciliation process and used Gatekeeper for automated testing. 	<ul style="list-style-type: none"> Optimized the number of ETL jobs from 2,400 to 700 Enhanced time to market by 60% Led to effort savings of 40% Enabled on-time availability through redesigned data models
A software company	<ul style="list-style-type: none"> AI Analytics IA 	<ul style="list-style-type: none"> The client wanted to automate its marketing and operations processes to enhance customer engagement. HCLTech enabled the development, testing, and publication of websites in over 70 markets and leveraged its CoE to drive the adoption of enterprise MarTech platforms. It utilized AI/ML models to improve the targeting, onboarding, and retention of brands and provided granular marketing campaign views to brands using PowerBI. 	<ul style="list-style-type: none"> Enabled over 20 customer engagements Developed over 500 web pages per month Sent more than 1B emails Ensured content moderation across 30 channels
A social media company	<ul style="list-style-type: none"> AR/VR Product engineering 	<ul style="list-style-type: none"> The client wanted to establish a lab environment for hardware engineering services and testing of AR/VR-enabled goggles. HCLTech designed an end-to-end testing and validation CoE with thermal stress test capabilities for the validation and testing of VR devices. It also set up an AR/VR chips nanofabrication supporting lab for the process engineering of new platforms, with capabilities to support data modeling, planning, and optical lithography. 	<ul style="list-style-type: none"> Reduced time to market of new products by at least 25% Automated the validation process of the last known good build products for regression testing
A US-based capital equipment company	<ul style="list-style-type: none"> AR Cloud Cybersecurity 	<ul style="list-style-type: none"> During COVID-19, the client wanted to create a secure connect platform to enable engineers to remotely connect with subject matter experts to troubleshoot problems. HCLTech used AR-enabled glasses and a secure connection to design a remote access solution for connecting semiconductor consoles at a customer location. It utilized Azure Files services to share files with the client. 	<ul style="list-style-type: none"> Decreased costs by \$500K annually Increased service productivity by about 10% Reduced delays by offering just-in-time support

Analyst insights

Practice maturity



- With a 22.5% YOY CC growth from the high-tech vertical, HCLTech has created value for high-tech clients by leveraging emerging technologies such as AR/VR, digital twins, IoT, and AI and solutions such as iONA and Remote Equipment Diagnostics. Its Remote Equipment Diagnostics framework leverages AR-enabled glass and remote desktop capabilities for remote semiconductor equipment repair.
- It developed a digital twin for factory planning to help high-tech clients with 3D simulations. For instance, it designed a digital twin for wafer dispatch at a Malaysian plant and ran 3D simulations to identify the number of automated guided vehicles (AGVs) to be procured, ensure their effective utilization, and plan AGV transport in a wafer polishing shop floor, resulting in a utilization target of 89% and a potential CAPEX saving of one AGV.
- It helped ISVs improve margins through its professional services-as-a-service offering. It helped a Silicon Valley company pivot from being an equipment vendor to a software company by enabling an as-a-service model, generating a revenue of over \$10B from services.
- HCLTech exhibits strong ESG capabilities using solutions such as the Design for Sustainability framework and net zero intelligent operations.

Investments and innovation



- HCLTech has invested strategically in acquiring technological capabilities to support customers across high-tech and other industries. In May 2022, it acquired Quest Informatics to augment its Industry 4.0 capabilities through its cloud-enabled aftermarket ERP and field service management suites. In January 2022, it acquired Starschema to strengthen its digital data engineering and telematics-related analytics capabilities for high-tech original equipment manufacturers.
- It has invested in expanding its delivery centers across Mexico, Poland, Romania, and India to help high-tech clients build nearshore digital competencies. In June 2023, it opened a testing lab in Chennai, India, to help network infrastructure OEMs with the testing and validation of 5G solutions.
- It has also invested in early-stage startups through Morado Ventures and Sumeru Equity Partners to focus on disruptive technologies such as cloud and big data.

Partner ecosystem



- HCLTech has collaborated with industry-specific partners such as NVIDIA to develop POCs and solutions using AI, DELL to develop cyber recovery solutions for protection against ransomware, and Intel for leveraging edge computing and hybrid/multicloud capabilities to help its high-tech clients.
- It has helped high-tech customers by leveraging its partnership with technology players such as SAP for modernizing IT systems and maintaining regulatory compliance, Adobe for developing marketing-as-a-service solutions, and Blue Prism for optimizing costs and operational efficiency.
- It has partnered with cloud service providers such as Microsoft to develop the Digital Contact Center platform for streamlining customer service operations, AWS to enable secure and compliant digital transformation using cloud technologies, and Google Cloud to enable cloud transformation using its cloud-native labs.

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