



SEMTECH®

Leading Hyperscale Cloud Provider

From Technology Provider to Strategic Collaborator

How early engagement helped a leading hyperscaler turn an ambitious idea into a scalable data center solution

QUICK FACTS

Company

Leading hyperscale cloud provider

Customer Profile

A leading hyperscale cloud provider set out to develop a new approach to optical connectivity for its data centers. It sought strategic partners that could help translate an ambitious business objective into a practical, scalable solution.

Objectives

The customer needed to balance several priorities at once:

- Deliver the required performance
- Achieve an aggressive cost target
- Identify partners capable of supporting deployment at scale
- Align early across the ecosystem on what the final solution needed to accomplish

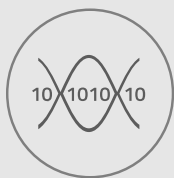
Results

A robust, cost-effective optical interconnect solution aligned with the customer's data center architecture

- Program now in production
- Shipment volumes have continued to grow since launch
- Additional versions developed that continue to use Semtech technology
- Customer continues to engage Semtech on next-generation decisions

Products and Services

- [Data center portfolio](#)



“ By engaging before the answer was fully defined, Semtech moved from technology provider to strategic collaborator, helping turn an ambitious idea into a scalable solution.

”

INTRODUCTION

Transforming customer engagement means being invited into the conversation before the answer is fully defined.

That is what happened when a leading hyperscale cloud provider set out to develop a new approach to optical connectivity for its data centers. The customer was not simply looking for another component. It was looking for strategic partners that could help translate an ambitious business objective into a practical, scalable solution.

Semtech was selected as one of the first partners to participate in the initiative. From the outset, the Semtech team worked alongside the customer to help define requirements, evaluate design choices and align the broader group of partners needed to bring the concept to life. That early involvement positioned Semtech not only to provide technology, but also to help shape the solution.

CHALLENGE

Balancing performance, cost and scale

The customer needed to balance several priorities at once: deliver the required performance, achieve an aggressive cost target and identify partners capable of supporting deployment at scale.

Aligning the ecosystem early

Meeting those objectives required more than choosing technology from a catalog. It required close collaboration across the ecosystem and early alignment on what the final solution needed to accomplish.



SOLUTION

Integration that simplifies the design

Semtech brought an approach that met the customer's performance and cost objectives while simplifying the design and supporting their volume requirements:

- **Laser-driver integration:** Signal retiming integrated with laser-driver circuitry onto a single chip.
- **Receiver integration:** Signal retiming integrated with transimpedance amplifier circuitry onto a single chip.
- **Proprietary design IP:** Delivers the needed performance with power low enough not to degrade the heat-sensitive optical components' performance.
- **Collaboration at scale:** A proven ability to work across technical and supply-chain teams, helping move the program from an initial concept toward production.

That simplification came from integrating key electrical functions that would typically be done on separate chips. This integration also reduced the space needed and the cost of the final solution as compared to a discrete design using separate components.

BENEFITS

Production success and continued growth

- **In production:** The program is now in production.
- **Growing volumes:** Shipment volumes have continued to grow since launch.
- **Extended reach:** The customer subsequently developed additional versions that continued to use Semtech technology.
- **Right-sized solution:** A robust, cost-effective optical interconnect solution aligned with the customer's data center architecture.

A resource for what comes next

As the customer considers future directions, it continues to engage Semtech in discussions about potential opportunities and next-generation decisions. The customer still turns to Semtech when it's time to think about what's next, most recently with an invitation to engage in conversations about its future direction.





The significance of those conversations is not that every future answer has already been determined. It is that Semtech has earned a place in the discussion.

The progression:

- An initial technology evaluation became a collaborative development program.
- A component provider became part of the customer's solution team.
- A successful deployment created the foundation for an ongoing strategic relationship.

This progression reflects the customer engagement model Semtech is building across its business. By entering the process earlier, helping customers clarify requirements and working across the ecosystem to solve broader challenges, we believe Semtech can create value that extends beyond an individual product or design win.

That is the shift at the heart of transforming customer engagement: moving from responding to a defined need to helping customers determine what is possible next.

Forward-looking Statements

This case study contains "forward-looking statements" within the meaning of the "safe harbor" provisions of the Private Securities Litigation Reform Act of 1995, as amended. Forward-looking statements are those other than historical information or statements of current condition and relate to matters such as future financial and operational performance; the Company's expectations regarding near term growth trends and market position; and its plans, objectives and expectations. These statements involve known and unknown risks and uncertainties that could cause actual results and events to differ materially from those projected and should be considered with the cautionary statements in the risk factors disclosed in the Company's filings with the Securities and Exchange Commission (the "SEC"), including Semtech's Annual Report on Form 10-K for the fiscal year ended January 25, 2026, filed March 23, 2026, as such risk factors may be amended, supplemented or superseded from time to time by other reports it files with the SEC. Forward-looking statements speak only as of the date made, and except as required by law, Semtech assumes no obligation to update them.

About Semtech

Semtech Corporation (Nasdaq: SMTC) is a leading provider of high-performance semiconductors powering AI data center networking, IoT connectivity and intelligent connected devices worldwide. Our global teams are committed to empowering solution architects and application developers to develop breakthrough products for the infrastructure, industrial and consumer markets.

To learn more about Semtech technology, visit us at [Semtech.com](https://www.semtech.com) or follow us on [LinkedIn](#) or [X](#).

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