

FROST & SULLIVAN
BEST PRACTICES



2026
**INDIAN AI
INFRASTRUCTURE**

COMPANY OF THE YEAR



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Best Practices Criteria for World-Class Performance

Frost & Sullivan applies a rigorous analytical process to evaluate multiple nominees for each recognition category before determining the final recognition recipient. The process involves a detailed evaluation of best practices criteria across two dimensions for each nominated company. Yotta Data Services excels in many of the criteria in the Indian AI Infrastructure space.

RECOGNITION CRITERIA	
<i>Visionary Innovation & Performance</i>	<i>Customer Impact</i>
Addressing Unmet Needs	Price/Performance Value
Visionary Scenarios Through Megatrends	Customer Purchase Experience
Leadership Focus	Customer Ownership Experience
Best Practices Implementation	Customer Service Experience
Financial Performance	Brand Equity

The Transformation of the AI Infrastructure Services Market in India

India faces a significant mismatch between the scale of data it generates and the domestic infrastructure available to securely store and process it. Although the country produces nearly 20% of the world’s data, as per Intel India, the country holds only about 1-3% of global data center capacity, resulting in heavy reliance on foreign cloud providers and heightened sovereignty risks. The gap will grow as AI usage continues to proliferate.

To meet the infrastructure needs driven by regulatory mandates, national security concerns, and AI-driven workloads, Indian organizations urgently require sovereign cloud environments and regionally distributed data centers. Such infrastructure will ensure compliance, reduce latency, strengthen digital autonomy, and support the nation’s rapidly expanding digital ecosystem. Stepping into the gap is Yotta Data Services.

Visionary Leadership: Preparing to Drive Transformation

Yotta Data Services has emerged as a foundational force in supporting India’s sovereign AI ambitions. Guided by the leadership of Cofounder, MD and CEO Sunil Gupta, Yotta is redefining India’s role in the global AI landscape. Gupta’s vision is rooted in the belief that India’s combination of domestic investment appetite, deep technical talent, and government alignment provides a long-term structural advantage. Under his direction, Yotta is building infrastructure not only for India’s immediate AI demands but also for emerging regional markets in South Asia. This perspective—one that imagines India as an AI compute hub for neighboring nations—demonstrates a level of foresight and strategic positioning that differentiates Yotta from other regional infrastructure providers.

Addressing Unmet Needs: Responding to Requirements for Secure, Compliant, and AI-Ready Infrastructure

The AI ecosystem in India has struggled with challenges including limited access to advanced GPU infrastructure, a fragmented development environment, and dependency on global hyperscalers that can't fully meet sovereign data requirements.

Hyperscalers face structural limitations when competing with Yotta in India's sovereign cloud landscape. Their global operating models are designed for scale and standardization, often relying on cross-border control planes, shared architectures, and foreign parent governance. This makes meeting India's stringent data residency, jurisdictional control, and government-grade sovereignty requirements more complex. Yotta, by contrast, is Indian-owned, operates fully within national borders, and aligns its infrastructure, legal oversight, and operational control with India's regulatory and strategic priorities. This local-first design allows Yotta to offer true data sovereignty, assured compliance, and greater trust for government, regulated, and critical-infrastructure workloads.

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**- Harsh Singh
Associate**

Yotta directly addresses these gaps by providing integrated, AI-ready compute environments built on highspeed InfiniBand networks, NVIDIA-certified hardware stacks, and software frameworks that dramatically reduce the time and complexity involved in deploying AI workloads. Yotta follows a vertically integrated model that spans infrastructure, integrated data center operations, cloud & managed services and AI/GPU services. At the infra layer, Yotta owns and manages the foundational components required for hyperscale operations, including land, buildings, substations, DG sets, fuel storage, redundant generators,

and power infrastructure. This gives the company greater control over scalability, resilience, and uptime.

At the integrated DC layer, Yotta operates a fully owned and integrated MEP stack comprising cooling systems, electrical systems, building management systems, security systems, mechanical systems, and interior fit-outs. Above this, Yotta operates Cloud and Managed Services comprising storage, CPUaaS, SOC/NOC operations, memory intensive computing, and servers. The AI/GPU Services layer sits at the top, offering high-density GPU racks, AI-optimised power and cooling, and low-latency networking to support large-scale AI and hyperscale workloads.

This integrated approach has proven instrumental for leading AI firms. Yotta's clients include Sarvam AI, one of India's pioneering private language model developers, which chose Yotta's platform to build and scale its models domestically. Similarly, BHASHINI—the Government of India's national language AI platform—transitioned its entire workload from a global hyperscaler to Yotta, achieving meaningful improvements in cost efficiency, performance, uptime, and compliance with India's data-sovereignty principles.

Best Practices Implementation: Applying Engineering and Operational Excellence to AI Infrastructure Design

Yotta's infrastructure exemplifies disciplined, world-class engineering. Its Tier IV-certified Navi Mumbai facility and large-scale data center campus in Greater Noida have been designed for exceptionally dense, power-efficient AI workloads. Features such as alternate-floor engineering optimize cooling efficiency and equipment placement, while NVIDIA InfiniBand and NVLink integration ensure predictable scaling and low-latency performance across large GPU clusters.

"Yotta has established itself as India's preeminent brand in sovereign AI infrastructure. Its message— "India's AI runs on Yotta"—has resonated strongly across government agencies, industry leaders, and the wider AI innovation ecosystem. The company's prestigious designations, including being one of only a handful of NVIDIA Reference Platform Cloud Partners worldwide and the first in Asia to receive multiple NVIDIA accolades, reinforce its credibility."

**- Harsh Singh
Associate**

Complementing this technical foundation is a strong operational ethos. Yotta operates its own substations, enhancing power reliability, and integrates renewable energy sources to reduce environmental impact. Yotta is the only data center player in India with a Power DisCom License for GPUaaS and large-scale data center operations, giving it a unique infrastructure advantage in powering AI workloads. It has dual-direction grid access from two different IPPs, ensuring unmatched resilience and reliability.

Closed-loop cooling systems significantly curtail water usage, underscoring the company's commitment to sustainable, future-proof operations. Together, these measures represent a best-practice approach to

building reliable, scalable, and resilient AI infrastructure.

Price/Performance Value: Balancing Performance, Cost Predictability, and Sovereignty Considerations

By combining hyperscale-grade compute with localized pricing models, Yotta delivers a compelling price/performance advantage. Empanelled in the India AI Mission, Yotta provides over 60% of GPU compute capacity. Programs such as the India AI Mission enable startups and innovators to access advanced GPU capacity at economically attainable rates—without compromising on performance or sovereignty. The blend of high value, strong regulatory alignment, and predictable operating costs results in a superior total cost of ownership compared to international hyperscaler alternatives.

Yotta's price-performance advantage in India stems from its purpose-built, localized infrastructure model. By owning and operating hyperscale data centers within India, Yotta benefits from optimized power costs, efficient cooling, and lower network latencies, which directly translate into more competitive pricing. Unlike international hyperscalers, Yotta does not impose high data-egress fees or dollar-linked pricing, allowing customers to manage costs in INR with greater predictability.

Customer Ownership Excellence: Supporting Customers Across AI Development, Deployment, and Scaling Journeys

Yotta's platforms are thoughtfully designed to grow with customers throughout their AI journey. Yotta's Shakti Cloud and Shakti Studio platforms are designed to support India's growing need for sovereign, AI

ready digital infrastructure. Shakti Cloud is a sovereign AI Cloud platform that delivers high-performance compute infrastructure for AI on a global scale. Its offerings include AI Lab, AI Workspace VM, Bare Metal, Cluster, AI Endpoints, Serverless GPUs and Fine-tune.

Shakti Studio is an AI inference platform to explore, fine-tune, and deploy instantly, powered by scalable endpoints and enterprise-grade GPUs. The self-service environment allows even small teams to begin experimentation quickly, while larger enterprises benefit from more advanced capabilities such as DGX Cloud integration, Azure AI models, and NVIDIA enterprise software stacks. GPU-dense infrastructure compatible with DGX architectures enables faster AI training and inference at scale, while NVIDIA's enterprise software stack—covering AI frameworks, model optimization, and orchestration—accelerates deployment and improves reliability. At the application layer, access to advanced Azure AI models allows enterprises to build modern AI solutions without locking their data or control outside India. Further strengthening the ecosystem, IBM and Yotta have announced plans to partner on an Agentic AI platform for enterprises and government organisations in India. Proposed to be built using IBM watsonx Orchestrate and deployed on Shakti Cloud, the platform is intended to help organisations scale AI adoption while addressing evolving requirements around data residency, and regulatory compliance.

Yotta is building India's largest sovereign AI compute platform, with 1,024 L40s and 8,192 H100 GPUs already live in NM1, with plans to scale to more than 80,000 next-generation GPUs by FY27–28, including B200 and B300 GPUs, positioning India among the world's leading AI compute hubs.

Customer Service Experience: Maintaining Service Reliability for Complex and Mission-Critical Deployments

Yotta's dedication to service excellence is evident in its hands-on support models and operational dependability. BHASHINI's seamless migration from a global hyperscaler to Yotta's sovereign cloud—executed with zero data loss and uninterrupted service—is emblematic of the company's capability to manage complex, mission-critical transitions. Yotta's 24x7 support operations, proactive monitoring, and responsiveness further strengthen customer confidence and satisfaction, particularly for workloads requiring high uptime and low latency.

Brand Equity: Building Trust and Credibility in Emerging Sovereign AI Ecosystem

Yotta has established itself as India's preeminent brand in sovereign AI infrastructure. Its message—"India's AI runs on Yotta"—has resonated strongly across government agencies, industry leaders, and the wider AI innovation ecosystem. The company's prestigious designations include being one of only a handful of NVIDIA Reference Platform Cloud Partners worldwide and the first NVIDIA Cloud Partner (NCP) in the Asia-Pacific region to join the NVIDIA Exemplar Clouds initiative, reinforce its credibility and technological leadership. Yotta's growing influence, both domestically and internationally, is a testament to its strong brand equity and the trust placed in it by mission-critical public and private-sector stakeholders.

Conclusion

Yotta has emerged as a cornerstone of India's sovereign AI ecosystem by closing critical infrastructure gaps with purpose-built, AI-ready data centers that deliver security, performance, and regulatory alignment at scale. Through its locally governed cloud platforms, integrated GPU infrastructure, and customer-centric services, the company has enabled government bodies, enterprises, and AI innovators to build and deploy advanced workloads entirely within India. Yotta's disciplined engineering, strong price-performance position, and unwavering focus on data sovereignty have earned deep trust across mission-critical sectors. With its strong overall performance, Yotta earns Frost & Sullivan's 2026 Company of the Year Recognition in the India AI Infrastructure industry.

What You Need to Know about the Company of the Year Recognition

Frost & Sullivan's Company of the Year Recognition is its top honor and recognizes the market participant that exemplifies visionary innovation, market-leading performance, and unmatched customer care.

Best Practices Recognition Analysis

For the Company of the Year Recognition, Frost & Sullivan analysts independently evaluated the criteria listed below.

Visionary Innovation & Performance

Addressing Unmet Needs: Customers' unmet or under-served needs are unearthed and addressed to create growth opportunities across the entire value chain

Visionary Scenarios Through Megatrends: Long-range scenarios are incorporated into the innovation strategy by leveraging megatrends and cutting-edge technologies, thereby accelerating the transformational growth journey

Leadership Focus: The company focuses on building a leadership position in core markets to create stiff barriers to entry for new competitors and enhance its future growth potential

Best Practices Implementation: Best-in-class implementation is characterized by processes, tools, or activities that generate consistent, repeatable, and scalable success

Financial Performance: Strong overall business performance is achieved by striking the optimal balance between investing in revenue growth and maximizing operating margin

Customer Impact

Price/Performance Value: Products or services offer the best ROI and superior value compared to similar market offerings

Customer Purchase Experience: Purchase experience with minimal friction and high transparency assures customers that they are buying the optimal solution to address both their needs and constraints

Customer Ownership Excellence: Products and solutions evolve continuously in sync with the customers' own growth journeys, engendering pride of ownership and enhanced customer experience

Customer Service Experience: Customer service is readily accessible and stress-free, and delivered with high quality, high availability, and fast response time

Brand Equity: Customers perceive the brand positively and exhibit high brand loyalty, which is regularly measured and confirmed through a high Net Promoter Score®

Best Practices Recognition Analytics Methodology

Inspire the World to Support True Leaders

This long-term process spans 12 months, beginning with the prioritization of the sector. It involves a rigorous approach that includes comprehensive scanning and analytics to identify key best practice trends. A dedicated team of analysts, advisors, coaches, and experts collaborates closely, ensuring thorough review and input. The goal is to maximize the company’s long-term value by leveraging unique perspectives to support each Best Practice Recognition and identify meaningful transformation and impact.

STEP		VALUE IMPACT	
		WHAT	WHY
1	Opportunity Universe	Identify Sectors with the Greatest Impact on the Global Economy	Value to Economic Development
2	Transformational Model	Analyze Strategic Imperatives That Drive Transformation	Understand and Create a Winning Strategy
3	Ecosystem	Map Critical Value Chains	Comprehensive Community that Shapes the Sector
4	Growth Generator	Data Foundation That Provides Decision Support System	Spark Opportunities and Accelerate Decision-making
5	Growth Opportunities	Identify Opportunities Generated by Companies	Drive the Transformation of the Industry
6	Frost Radar	Benchmark Companies on Future Growth Potential	Identify Most Powerful Companies to Action
7	Best Practices	Identify Companies Achieving Best Practices in All Critical Perspectives	Inspire the World
8	Companies to Action	Tell Your Story to the World (BICEP*)	Ecosystem Community Supporting Future Success

*Board of Directors, Investors, Customers, Employees, Partners

About Frost & Sullivan

Frost & Sullivan is the Growth Pipeline Company™. We power our clients to a future shaped by growth. Our Growth Pipeline as a Service™ provides the CEO and the CEO's growth team with a continuous and rigorous platform of growth opportunities, ensuring long-term success. To achieve positive outcomes, our team leverages over 60 years of experience, coaching organizations of all types and sizes across 6 continents with our proven best practices. To power your Growth Pipeline future, visit Frost & Sullivan at <http://www.frost.com>.

The Growth Pipeline Generator™

Frost & Sullivan’s proprietary model to systematically create ongoing growth opportunities and strategies for our clients is fueled by the Innovation Generator™.

[Learn more.](#)

Key Impacts:

- **Growth Pipeline:** Continuous Flow of Growth Opportunities
- **Growth Strategies:** Proven Best Practices
- **Innovation Culture:** Optimized Customer Experience
- **ROI & Margin:** Implementation Excellence
- **Transformational Growth:** Industry Leadership



The Innovation Generator™

Our 6 analytical perspectives are crucial in capturing the broadest range of innovative growth opportunities, most of which occur at the points of these perspectives.

Analytical Perspectives:

- **Megatrend (MT)**
- **Business Model (BM)**
- **Technology (TE)**
- **Industries (IN)**
- **Customer (CU)**
- **Geographies (GE)**

