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SpaceX Signs Major AI Infrastructure Deal with Google

Published On: 08-06-2026



Why in News:?

Google has signed a major AI infrastructure agreement with SpaceX under which SpaceX will provide large-scale AI computing capacity to Google. The deal is expected to generate approximately \$920 million per month for SpaceX.

What is the Deal?

Under the agreement, SpaceX will provide high-performance AI computing infrastructure to support Google's AI services.

The partnership aims to meet the growing demand for Google's Gemini Enterprise AI platform.

It is one of the largest AI infrastructure agreements announced in the technology sector.

Key Highlights:

Google will use around 110,000 Nvidia GPUs hosted in SpaceX data centers.

The agreement will run from October 2026 to June 2029.

SpaceX is expected to earn about \$920 million per month from the deal.

Google can terminate the agreement if SpaceX fails to provide the committed GPU capacity by September 2026.

The deal supports the expansion of Google's Gemini Enterprise AI platform.

It is the second major AI infrastructure agreement announced by SpaceX after its merger with xAI.

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Plot A P.127, AF block, 6 th street, 11th Main Rd, Shanthi Colony, Anna Nagar, Chennai, Tamil Nadu 600040
Phone: **044 4353 9988 / 98403 94477 / Whatsapp : 09710729833**

SpaceX invested \$7.7 billion in AI-related infrastructure during the first quarter.

SpaceX is preparing for a proposed IPO with a valuation target exceeding \$1.75 trillion.

About SpaceX:

Founded: 2002

Founder: Elon Musk

Headquarters: Hawthorne, California, USA

Major Services: Space launch vehicles, satellites, Starlink internet, AI infrastructure

Starlink: Global satellite internet service operated by SpaceX

About Google:

Parent Company: Alphabet Inc.

Founded: 1998

Headquarters: Mountain View, California, USA

CEO: Sundar Pichai

AI Platform: Gemini Enterprise

About NVIDIA:

Founded: 1993

Headquarters: Santa Clara, California, USA

Specialization: AI-focused Graphics Processing Units (GPUs)

Role: Leading supplier of advanced AI computing hardware

Exam Focus Points (Quick Revision Notes):

Companies Involved: Google & SpaceX

Deal Value: \$920 Million per Month

GPUs Involved: 110,000 Nvidia GPUs

Agreement Period: Oct 2026 – Jun 2029

Purpose: AI Computing Capacity

Google AI Platform: Gemini Enterprise

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SpaceX Founder: Elon Musk

SpaceX AI Partner: xAI

Expected IPO Valuation: Over \$1.75 Trillion

AI Infrastructure Investment: \$7.7 Billion

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