

Alphabet Q3 2026: TPU Systems Reach Customer Data Centers, Some Under Repurchase Terms

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Alphabet · Internet services and cloud infrastructure · Q3 FY2026 (calendar year), July 1-September 30, 2026 · Results released October 28, 2026 · Compared with Q3 2025 and Q2 2026

1. Operational summary

Alphabet now builds TPU systems (Tensor Processing Units, Google's custom AI accelerators, delivered as racks with software, installation, support and extended warranty) for other companies' data centers as well as its own. The Q3 10-Q discloses for the first time that some of these sales give the customer an option to require Alphabet to repurchase the hardware at pre-set prices, provided it is returned in working order. For ITAD providers, the central finding is practical: anyone handling customer-owned TPU systems must establish whether repurchase rights apply before quoting resale or recycling services, and the working-order condition makes careful deinstallation, testing and transport commercially relevant. Alphabet also announced TPU delivery partnerships with Oracle and with Crux AI, its data center joint venture with Blackstone, began using third-party compute capacity at the end of the quarter, and described the market for accelerated compute as supply-constrained.

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