



## GPU Oracle AI News this week

This week, Oracle has been at the center of several major AI-GPU news stories and partnerships, highlighting its rapid expansion as a leader in cloud AI infrastructure. [\[1\]](#) [\[2\]](#) [\[3\]](#) [\[4\]](#) [\[5\]](#)

### OpenAI, Oracle, and NVIDIA Strategic Expansion

- Oracle, in collaboration with OpenAI and SoftBank, announced a significant expansion of the Stargate AI datacenter project, launching five new sites. This brings them closer to fulfilling a \$500B, 10-gigawatt compute commitment by the end of 2025, powered by NVIDIA GPUs and Oracle Cloud. [\[2\]](#) [\[6\]](#) [\[3\]](#)
- Oracle is reported to be planning \$30 billion in AI infrastructure investments primarily for OpenAI's needs, reinforcing their lead role in hyperscale GPU infrastructure. [\[3\]](#) [\[7\]](#)
- OpenAI and NVIDIA's parallel agreement to deploy at least 10 GW of NVIDIA systems aligns closely with this Oracle-OpenAI partnership, indicating the infrastructure will likely run on Oracle Cloud's GPU superclusters. [\[6\]](#) [\[4\]](#) [\[2\]](#)

### Massive New Cloud Deals and Revenue Growth

- Oracle is negotiating a multi-year AI cloud deal with Meta, reportedly worth about \$20 billion, underlining the rapid enterprise demand for Oracle's GPU-backed cloud services. [\[5\]](#) [\[1\]](#)
- Oracle's pivot to GPU-driven cloud infrastructure has fueled a 336% year-over-year increase in GPU consumption and a 52% rise in IaaS revenue, hitting \$2.4B for Q2 2025. [\[5\]](#)
- Oracle is expanding capacity with new datacenters—47 new global sites announced—aiming to handle growing customer needs for GPU compute without egress fees, creating a price/performance advantage over rivals. [\[2\]](#) [\[5\]](#)

### GPU Infrastructure Innovations

- Oracle Cloud Infrastructure (OCI) now features the GB200 NVL72 Superclusters and enables access to more than 131,000 NVIDIA Blackwell GPUs per cluster, supporting demanding AI and generative workloads. [\[8\]](#) [\[4\]](#) [\[9\]](#)
- OCI is also building out superclusters with AMD's newest MI355X processors, expanding options for AI model developers. [\[4\]](#)
- Integration with NVIDIA AI Enterprise has put over 160 AI tools and 100 NVIDIA NIM microservices directly into the Oracle Cloud console for seamless AI deployment and development. [\[10\]](#) [\[8\]](#)

## Industry Recognition

- Oracle was named a Leader once again in the 2025 Gartner Magic Quadrant for Distributed Hybrid Infrastructure, owing largely to its AI and GPU-backed cloud innovations.<sup>[11] [12]</sup>

These headlines show Oracle's aggressive investment in expanding AI compute infrastructure, strategic partnerships with OpenAI, NVIDIA, and Meta, and accelerated innovation in delivering GPU-powered AI solutions to the marketplace.<sup>[1] [8] [4] [2] [5]</sup>

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3. <https://www.futuriom.com/articles/news/tearing-apart-oracles-openai-deals/2025/09>
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6. <https://nvidianews.nvidia.com/news/openai-and-nvidia-announce-strategic-partnership-to-deploy-10g-with-nvidia-systems>
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