INDEPENDENT PUBLICATION · BUSINESS DECISIONS

THE BUYER'S PULSE

IT INFRASTRUCTURE | NEW TECHNOLOGIES | BUYING ADVISOR



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The Six-Trillion-Dollar Bet

The world will spend US$ 6.37 trillion on technology in 2026 — money already moving companies that will never buy a server.

US$ 6.37 T IT spending 2026 · +14.2%

+62.5% Data centers · US$ 822 B

US$ 733 B Big Four guidance · +79%

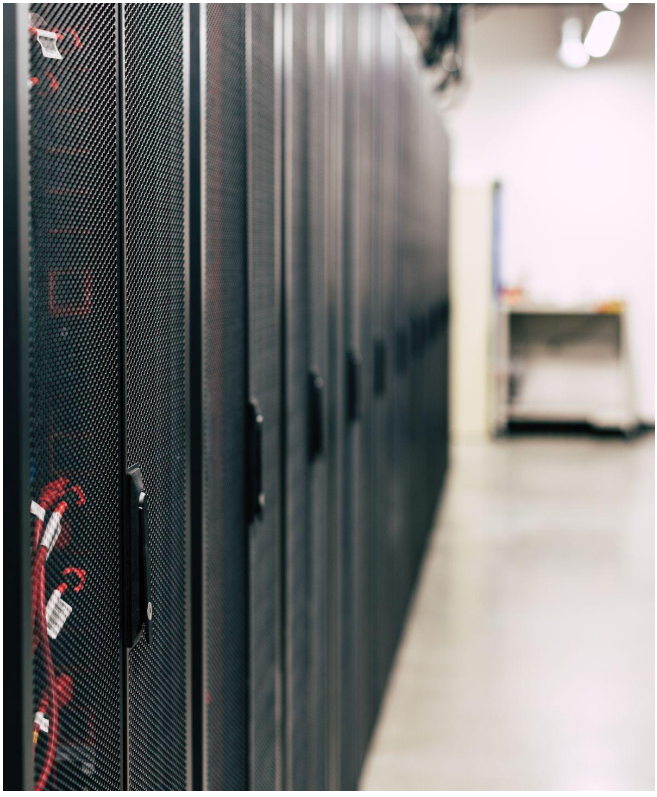
IN THIS ISSUE

The Six-Trillion-Dollar Bet, in five fronts · The market in figures · A normal company, Monday at 9

Whoever reads this publication is elite — a select club of technology experts.

THE PULSE IN FIGURES

The wave is measured in money, not headlines



AI compute capacity is being built at planetary scale.

Gartner, the analysis firm buyers around the world cite to close decisions, puts worldwide technology spending for 2026 at US$ 6.37 trillion, up 14.2% from 2025. The money lands

on every company in concrete places: the payroll, the quote, the customer and the final price.

US$ 6.37 trillion

Worldwide IT spending, 2026 · +14.2% vs. 2025

US$ 2.59 trillion

Worldwide AI spending, 2026 · +47% in the inflection year

+62.5%

Data center systems · US$ 822 billion · the fastest-growing segment

+29.3%

Infrastructure as a service (IaaS) · US$ 287 billion · capacity is rented by the month

+15.5%

Software · US$ 1.47 trillion · the line item that enters every office as a daily tool

+9.8%

Devices · US$ 868 billion · AI demand pressures components and memory

> “Building the compute capacity required for AI is the largest infrastructure project ever attempted by humanity.”
>
> JOHN-DAVID LOVELOCK · DISTINGUISHED VP ANALYST, GARTNER

BUSINESS AND AI

The Six-Trillion-Dollar Bet

The money has already moved. What follows is a chain of effects that reaches every management team on five fronts: the money, the work, the customer, the competition and prices.

OCTOBER 2026

01

FRONT 01 · THE MONEY

The cycle's largest infrastructure project already has a signed budget

Gartner calls building compute capacity for artificial intelligence the largest infrastructure project ever attempted by humanity, and puts total IT spending at US$ 6.37 trillion for 2026. It is not trade-show metaphor: it is the official reading of the house whose numbers management teams rely on to settle decisions.

The four largest platforms raised their combined investment from ~US$ 410 billion in 2025 to guidance of ~US$ 733 billion for 2026, an increase of close to 79% in one year. No company in our readership signs checks of that size; all of them operate inside the market those checks reconfigure.

+62.5%

Data center systems: US$ 822 billion in 2026, the fastest-growing segment of worldwide spending, ahead of software (+15.5%).

FRONT 2 · THE WORK

The spending does not stay in data centers: it reaches every office

The second growth engine is software: US$ 1.47 trillion and +15.5%. It is the line item that enters companies as daily work tools — sales, administration, customer service and marketing — not as distant infrastructure. The subscription renews, the AI feature appears, and the workflow moves under every team's feet.

Infrastructure as a service grows +29.3% to US$ 287 billion: companies rent capacity instead of buying it, and that shift moves jobs, suppliers and budgets in companies of every size. The productive discussion is no longer whether the company uses AI, but on which tasks, at what monthly cost, and with whom answering for the result.

+29.3%

Infrastructure as a service (IaaS): US$ 287 billion in 2026. Capacity is contracted by the month, building nothing.

THE BET IN FIGURES · WORLDWIDE, 2026

Total IT spending	**US$ 6.37 T · +14.2%**
Data center systems	**US$ 822 B · +62.5%**
AI spending	**US$ 2.59 T · +47%**
Software	**US$ 1.47 T · +15.5%**
IaaS	**US$ 287 B · +29.3%**
Devices	**US$ 868 B · +9.8%**

03

FRONT 3 · THE CUSTOMER

The buyer already arrived informed by the same technology



The first conversation is no longer informative; it is a validation.

The 2026 customer compares, quotes and discards with AI assistance before speaking to a salesperson. The first commercial conversation is no longer informative; it has become validation: the buyer arrives with a position already built and looks for whoever confirms it or improves it with evidence. Price, as a result, is discussed last.

Inside the buying company, the decision is made by a group and stalls as a group.

The content that group consumes to align itself is analysis with data behind it: evidence, not brochures. Whoever writes for that group writes for the whole decision, not for one reader.

>40%

Of B2B deals stall due to internal misalignment of the buying group, not because of the product or the price.

04

FRONT 04 · THE COMPETITION

Advantage moved from size to decision speed

When capacity is rented by the month, a mid-sized company accesses the same compute power as a corporation, building nothing. The historic infrastructure gap closes, and only one gap remains: judgment. Which process gets automated first, which supplier gets chosen, and which metric rules.

The money to move exists, even in the traditional distribution. Between 25% and 60% of co-op marketing funds go unused every year for lack of execution with evidence. The advantage belongs to whoever presents the plan, executes and reports: the fund follows the report, not the meeting.

25–60%

Of co-op marketing funds go unused every year, for lack of execution with evidence.

05

FRONT 05 · PRICES

The AI bill is also passed on to the rest of the economy

Gartner attributes part of the growth in device spending to AI demand pressing on components, memory included. Every employee's equipment, every fleet renewal and every department's budget pay a share of the bet, whether they signed it or not.

Software follows the same logic: AI built in as a standard feature raises the price of the tool every employee uses daily, at every renewal cycle. And deciding late also has a price: contracts are signed on the terms of the moment of highest demand, not of the moment of greatest calm.

+9.8%

Devices: US$ 868 billion in 2026, with memory prices rising, pushed by the same data center wave.

The reader does not place the six-trillion-dollar bet, but the reader pays its effects and collects its opportunities. **This decade's advantage is not having the technology first. It is deciding earlier, with verifiable data,** which part of that wave enters their company and which part is let go.

> “Enterprises have yet to really flex their spending potential. That is coming, and 2026 will be the inflection year.”
>
> JOHN-DAVID LOVELOCK · GARTNER

THE DECISION ORDER

Five decisions, in the order the money is committed



The physical front of the bet: the capacity the entire market rents by the month.

1 Capacity

Power, cooling and space before the purchase.

2 Cost

Cost per workload, never cost per box.

3 Operation

The talent and support that sustain the platform.

4 Portfolio

Inventory and marketing only with verifiable demand.

5 Governance

Data, records and accountability, signed once.

The money has already moved. US$ 6.37 trillion of spending in 2026 and combined guidance of US$ 733 billion from the four platforms set the market's pace.

The effect is general. Work, customer, competition and prices move for companies that will never buy a server.

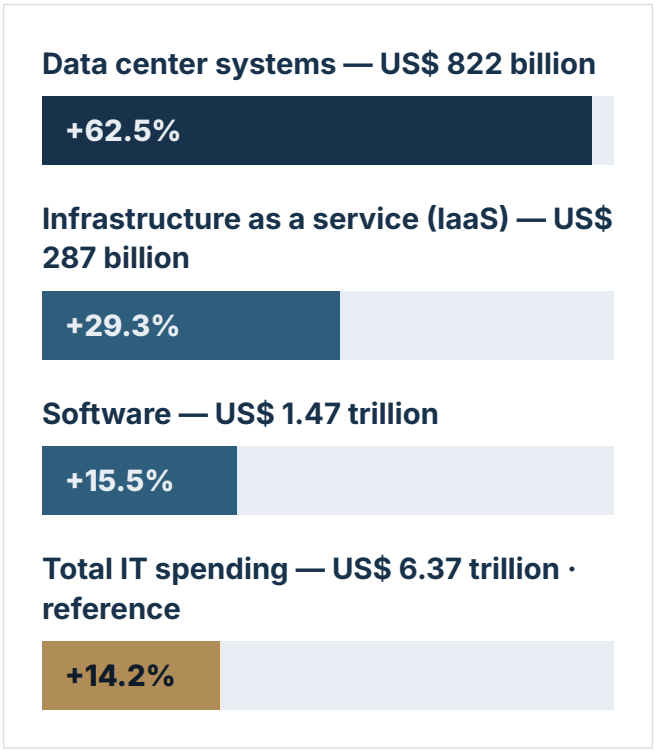
The advantage is judgment. With capacity for rent, whoever decides on verifiable data and reports results wins.

THE MONEY IN ONE CHART

Gartner's picture for 2026

Worldwide spending growth by segment, Gartner forecast of July 27,

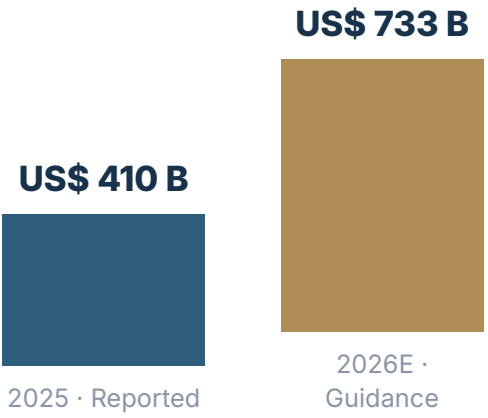
2026. The physical segment grows more than four times faster than the average.



The reading is about allocation, not catalog: new money enters first through physical capacity and then through tools. Every segment above the gold bar grows faster than the market.

THE CAPEX RACE

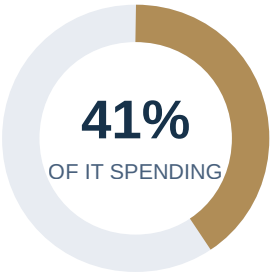
Four companies, one bet that rises 79% in a year



Combined guidance rises close to 79% in one year: four boards revised upward mid-year instead of cutting. The ecosystem's prices and lead times are set against this curve.

THE WEIGHT OF AI

Almost 41 cents of every IT dollar are already AI



US$ 2.59 trillion of AI over US$ 6.37 trillion of total IT spending

THE MARKET IN FIGURES

This issue's indicators, with their series and their source

Every new figure is published together with its origin and its evidence status. A figure without a status is a rumor in formatting.

Worldwide IT spending, 2026

US$ 6.37 trillion · +14.2%

The wave has a signed budget at historic scale

Worldwide AI spending, 2026

US$ 2.59 trillion · +47%

2026 is AI's inflection year, in Gartner's words

Data center systems

US$ 822 billion · +62.5%

The fastest-growing segment of worldwide spending

Big Four investment

~US$ 410 B → ~US$ 733 B

+79% in one year, on guidance updated in July 2026

Stalled B2B deals

More than 40%

The blocker is the buyer's internal misalignment

Unused marketing funds

25% to 60%

The money exists; execution with evidence is missing

How the status reads

Forecast. An analyst projection — not executed spend.

Guidance. Announced by the company itself — not executed spend.

Sponsored, self-reported. Authored by its sponsors; attitudes reported by their own respondents.

THE NORMAL COMPANY

A normal company, Monday at 9

What the six-trillion-dollar bet changes in a company that is not Google: no data center, no lab and no AI team, on the budget it already has.



The normal company decides in a meeting room, not in a data center: the order of the decisions makes the difference.

The normal company does not compete with the US$ 733 billion of the four platforms. It competes with the company across the street, which has its same size, its same market and, since this year, access to the same subscription tools. The difference is made by the order in which five decisions are taken.

1 The task inventory rules over the tool catalog.

First, the repeated tasks of sales, administration, service and marketing are listed; only then are tools chosen. A tool bought with no assigned task becomes an idle subscription in less than a quarter.

2 Every new subscription enters with a metric and an owner.

Cost per quote, per resolved ticket, per published piece of content or per hour saved. Without a prior metric there is no way to defend the renewal when the budget review arrives — and the review always arrives.

3 The supplier is evaluated on support, not on the demo.

In technology buying, the service level disqualifies more projects than the spec sheet. The demo shows the product's best day; the support contract defines the company's worst day.

4 The internal customer is convinced with a small, measured pilot.

A 30-day pilot, with a baseline and a result published internally, aligns management, finance and operations faster than any trend presentation. It is also the document that unblocks the buying group.

5 Manufacturers' money is requested with a plan and evidence.

Marketing funds and vendor programs reward whoever presents measurable execution. The fund is not won in the meeting: it is won with the previous quarter's report.

The Buyer's Pulse is an independent publication. No manufacturer, wholesaler or reseller conditions its coverage; all sponsored content is visibly identified and produced separately from editorial analysis. Companies' investment guidance is cited as guidance, with its evidence status.

Worldwide IT spending · Data center systems · IaaS · Software · Devices — Gartner, “Gartner Forecasts Worldwide IT Spending to Grow 14.2% in 2026, Totaling $6.37 Trillion,” press release, July 27, 2026 · verified,

forecast: total IT spending US$ 6.37 trillion (+14.2%); data center systems US$ 822 billion (+62.5%); infrastructure as a service US$ 287 billion (+29.3%); software US$ 1.47 trillion (+15.5%); devices US$ 868 billion (+9.8%). Quotations by John-David Lovelock, Distinguished VP Analyst, Gartner.

Worldwide AI spending — Gartner, “Gartner Forecasts Worldwide AI Spending to Grow 47% in 2026,” press release, May 19, 2026 · verified, forecast: US$ 2.59 trillion (+47%). Quotation by John-David Lovelock. The 41% share shown in the chart pages is an editorial calculation on the two Gartner figures above.

Big Four investment — Microsoft, Alphabet, Amazon and Meta: quarterly earnings reports and capital-expenditure guidance, compiled from public figures · compilation, guidance not executed: ~US$ 410 billion reported in 2025; ~US$ 733 billion combined guidance for 2026 (+79%), updated to July 2026.

Stalled B2B deals — Edelman–LinkedIn, B2B Thought Leadership Impact Report 2025 · sponsored by its authors, self-reported attitudes: more than 40% of B2B deals stall on internal buying-group misalignment.

Unused marketing funds — 360insights and Ansira · estimates in declared disagreement, cited without averaging: 25% to 60% of co-op marketing funds go unused every year.

Gartner Magic Quadrant positions are not cited: this publication cites from Gartner only its verified official press releases.

Data center photo (Council Bluffs, Iowa; cool grade applied): Photo: Chad Davis (CC BY 2.0), via Wikimedia Commons. Meeting photo: Pavel Danilyuk, via Pexels. Conversation photo via Pexels. Editorial format modeled on the public practice of Ars Technica and MIT Technology Review.

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