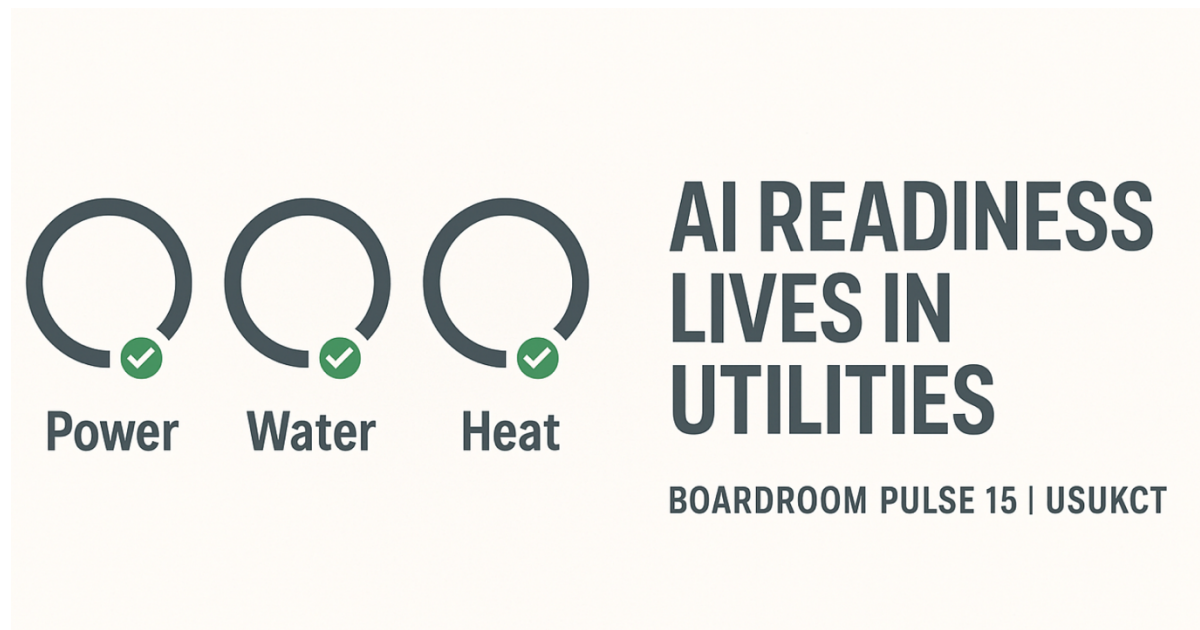


Boardroom Pulse #15

AI's New Frontier — Power, Water, and Trust



AI is no longer a technology question.
It is a capacity, community, and credibility question.

What boards are missing

Most directors now ask, *“How fast can we deploy AI?”*
The sharper question is, *“Can our infrastructure survive it?”*

This week brought a wake-up call:

- DNV’s global forecast shows data center electricity demand could rise tenfold by 2030 — yet the real constraint will not be electrons, but **the trust to use them**.
- UK grid curtailments are at record highs, paying millions to disconnect wind farms because transmission lines can’t keep up.
- Developers are filing multi-gigawatt data center plans faster than substations can be built.
- Water demand for cooling could double or quadruple in five years, forcing utilities and city planners into board-level conversations that never existed before.

When electricity, water, and heat reuse become board agenda items, AI stops being an IT project and becomes a **national-resource strategy**.

The invisible readiness gates

Before any board approves another “AI spend,” seven gates must be cleared:

1. Power secured: contract MW with verified interconnect milestones.
2. Water proved: seasonal plan, drought protocol, and independent verification.
3. Heat reused: a named off taker and signed delivery pipeline.
4. Curtailment resilience: clear cost model for outages and grid stress.
5. Supply-chain visibility: GPU and packaging allocation tracked by quarter.
6. Community assurance: public water and heat metrics in plain language.
7. One-page dashboard: updated monthly with red lines that trigger decisions.

Every one of these is measurable. Everyone can be shown in a board pack.

Common sense that travels

If one rule should guide AI investment now, it is this:

“Don’t buy capacity you cannot power, cool, or explain.”

A credible director should be able to point to a map and say:

“This is our megawatt. This is our water source. This is who benefits from our waste heat.”

That map is the new license to operate.

A board’s first move

Pick **one** site.

Lock **one** interconnect.

Name **one** heat off taker.

Publish **one** transparent water report.

When that happens, investors, regulators, and communities start to believe the board is not just chasing AI, it is governing it.

Why these matters

AI is rewriting not just balance sheets but **social contracts**.

Boards that treat utilities as part of strategy not background will secure cheaper capital, faster permits, and higher trust.

Those who don’t will discover that the bottleneck isn’t computing power, it’s **credibility**.

Closing thought

The next great moat in AI will not be algorithms.
It will be **resource discipline** measured, verified, and visible.
Boards that understand that will lead the decade.

#AIGovernance #BoardroomClarity #USUKCT.