

Water, Air and the AI Cooling Constraint

Opportunity follows constraint.

The cooling decision starts with usable capacity: can the complete system deliver the IT load promised to the customer through local peak conditions? Water access, electrical headroom and heat rejection determine the feasible architecture, who can authorize the commitment and where commercial value can move.

For owners, the test is capacity that can be delivered. For equipment and service businesses, the opportunity follows the constraint they can resolve and the responsibility they can carry.

Three gates before capital commitment

01 Water availability

02 Deliverable
infrastructure

03 Seasonal operation

Three questions to open the discussion

1. Where does the heat finally go?
2. What water must be available on the governing day?
3. Who owns performance when systems change mode?

Inside the nine-page decision workbook

Architecture comparison; peak-day exposure ledger; owner evidence-status scorecard; contract and service interface matrix; 90-day decision sequence; source notes.

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