



SYNC 3.0 — Board-Deck Blunt Version

Go / Conditional / No-Go Briefing

Version	Board Extract
Date	2026-06-25
Source	SYNC 3.0 Targeted Document Pack
Audience	Boards / Investment Committees

This standalone extract preserves the bluntest board-level posture from the SYNC 3.0 targeted pack. The message is intentionally narrow and decisive: SYNC 3.0 is not a generic efficient AI campus narrative. It is a resource-bounded, governance-attached utility-node standard. Fund only where the public-protection layer is binding.

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THE SYNC RECIPROCITY LICENSE (v3.0)

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For Commercial Hyperscale Developers: You are granted a license to utilize the hardware efficiencies of SYNC 3.0 (Pillars 1-4) IF AND ONLY IF you legally and contractually bind your facility to the Municipal Collapse-Prevention Layer (Pillars 5-7). >

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Board-Deck Blunt Version

This is the blunt version. SYNC 3.0 is not a generic efficient AI campus narrative. It is a resource-bounded, governance-attached utility-node standard. Fund it only where the public-protection layer is binding. If a developer wants the upside of Pillars 1 through 4 without the legal and operational burden of Pillars 5 through 7, the answer is no.

Issue	Board Read	Action
Greenfield-only PFAS-free waterless compute	Strong where water stress and permitting risk are material	Go
Thermal symbiosis	Real only when heat demand is proximate, contracted, and technically deliverable	Conditional
Edge inference efficiency	Credible only under corrected framing: quantization, distillation, pruning, scheduling, and inference ASICs	Go after correction
Verified telemetry	Baseline attested plaintext is enough; ZKP is niche, not core	Conditional
Hard demand caps	Without caps, rebound demand kills the thesis	Mandatory
Interconnection limit ledger	Without auditable occupancy, the project is exposed to phantom queue and over-allocation risk	Mandatory
Automated load- flexibility / curtailment	Without real shed capability, this is still a passive grid burden	Mandatory
Community legitimacy layer	Important for continued operation, but does not rescue a weak core	Conditional enhancement

Board Reading of the Thesis

- **This is a buildability thesis, not a branding thesis.**
- **This is a denial-risk reduction thesis, not a universal scale thesis.**
- **This is a public-systems compatibility thesis, not a pure compute-growth thesis.**

- **This is a selective greenfield strategy, not a retrofit portfolio strategy.**

Board conclusion: Approve only at gated pilot scale and only with binding governance attachment. Deny any version that asks for efficiency upside while resisting caps, ledger discipline, or enforceable flexible-load behavior.

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Gating Conditions and No-Go Triggers

Minimum Gating Conditions

1. Greenfield site with real basin or interconnection rationale for the SYNC model.
2. Binding subscribed-load cap embedded in utility and municipal approvals.
3. Auditable interconnection occupancy ledger or equivalent regulator-held register.
4. Demonstrated flexible-load and curtailment procedures with rebound control.
5. Corrected Pillar 3 framing—no generalized neuromorphic transformer claims.
6. Plaintext regulator-readable telemetry path live from day one.
7. Thermal symbiosis claimed only where anchor demand is real and proximate.

No-Go Triggers

- Project asks to be treated as efficient but refuses hard demand caps.
- Project claims SYNC legitimacy while resisting an auditable ledger of interconnection occupancy.
- Project treats thermal revenue as assumed rather than conditional.
- Project uses a blended IRR headline without disclosing that 12.8%–21.4% is a merged decision range, not a guaranteed outcome.
- Project presents retrofit rollouts as economically equivalent to greenfield deployment.
- Project frames telemetry sophistication as a substitute for operating discipline.

Capital committee bottom line: SYNC 3.0 is not approved for blanket rollout. It is approved only as a staged, governance-attached pilot posture that can prove public-system compatibility before scale.

Blunt board summary: finance the bounded node, not the uncapped narrative.

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