

Blue Geopolitics: Water as the Next Strategic Currency

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Source: Getty Images

Introduction

Water is one of the main natural components of life. Humans rely on water resources to fulfill their daily diverse needs. Freshwater is essential for human survival, agriculture, industrial production, and ecological stability. But lately, water has transitioned from a mere natural resource to a pivotal element in global power dynamics. While other energy resources such as oil and gas dominated global strategic competition throughout the twentieth century, the upcoming decades may witness

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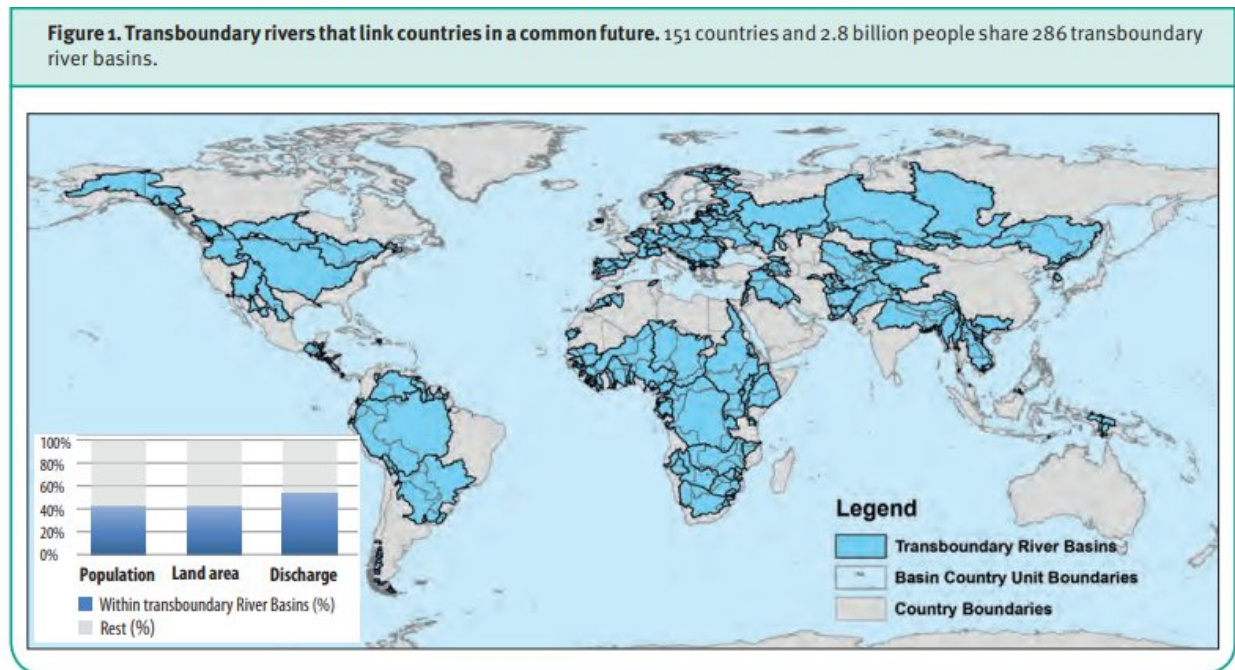
a shift towards to the geopolitics of water; what many analysts describe as “Blue Geopolitics”. It is centered on the control, distribution, and preservation of water resources. Uneven distribution of water combined with climate change, population growth and unsustainable consumption is making water a strategic commodity. According to the Water Crisis Clock by World Data Lab, 40% of global population are living in water scarce areas.² With this growing water scarcity, control over rivers, aquifers and water infrastructure is gradually becoming a tool for statecraft, diplomacy and conflict. The ongoing war on Iran has brought the strategic significance of maritime chokepoints into sharp focus, particularly the Strait of Hormuz. Since late February 2026, the war has thrust the Strait of Hormuz into the epicenter of blue geopolitics, where maritime chokepoints become weapons in hybrid conflicts over energy and security. Triggered by U.S.-Israeli strikes killing Supreme Leader Ali Khamenei, Iran's retaliation included closing the strait which handled 20% of global oil. This caused tanker traffic to halt and oil prices to surge over 40%. This crisis exemplifies how control of sea lanes amplifies geopolitical leverage, intertwining naval power, resource denial, and economic warfare. Water is no longer merely a resource to be managed, but a domain to be controlled, contested, and weaponized. This commentary explores how escalating scarcity, driven by climate change, population growth, and conflicts position water as the next strategic currency.

The Emergence of Blue Geopolitics

Blue geopolitics refers to the strategic competition among states over access to maritime and freshwater resources such as ocean, rivers, lakes, glaciers, and aquifers. The competition intended mostly for economic interests, territorial claims and different security imperatives. Historically, water was treated as a domestic, environmental or developmental commodity. However, globalization and environmental degradation have elevated water to a geopolitical concern, particularly in the regions with shared water bodies. According to UN Water, there are approximately 276 transboundary river basins worldwide, covering nearly half of the Earth's

² “Water Crisis Clock.” 2025. Worldwater.io. 2025. https://worldwater.io/#water_scarcity.

surface and shared by around 145 countries.³ This shared geography makes water governance inherently political.



Source: TRANSBOUNDARY WATERS ASSESSMENT PROGRAMME

We often see transboundary dispute between upstream and downstream states. Moreover, despite the fact that 70% of the Earth's surface is covered by seas and oceans, fresh water represents only 3%. Only one third of this 3% is available for human consumption, as the remaining 2% is frozen in the form of glaciers and ice sheets. Former UN Secretary-General Kofi Annan once warned that "fierce competition for freshwater may well become a source of conflict and wars in the future." Over the past five decades, more than 500 water-related disputes have been recorded globally, illustrating how water scarcity can intensify geopolitical tensions.

Water Scarcity and the Strategic Value of Freshwater

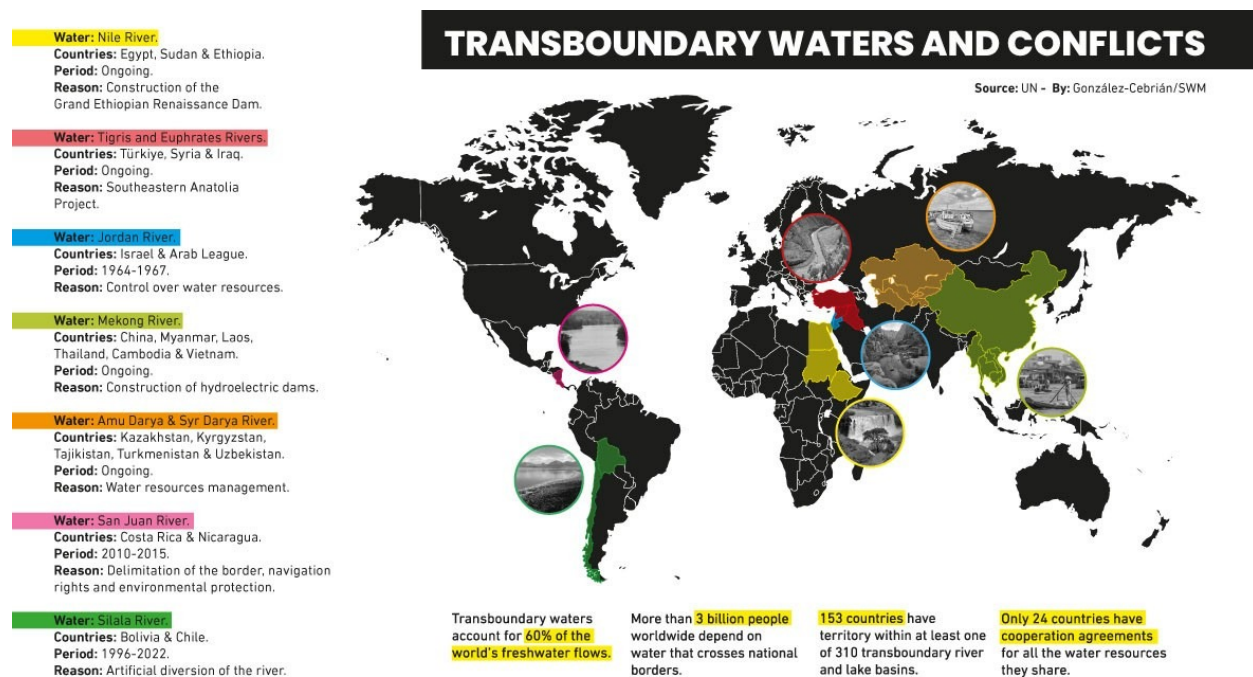
If we list top 10 challenges of the century, water scarcity will definitely be one of them. Global water demand is projected to rise dramatically due to population growth, urbanization, and expanding agricultural needs. Some estimates suggest that global freshwater demand may increase

³ "Water Security & the Global Water Agenda a UN-Water Analytical Brief." n.d.
<https://collections.unu.edu/eserv/UNU:2651/Water-Security-and-the-Global-Water-Agenda.pdf>.

by more than 50 percent by 2030, which may intensify competition among states and communities.⁴

Demand of freshwater is also unevenly distributed across the globe. For instance, Asia hosts around 60 percent of the world's population but only 39 percent of global freshwater resources, while other regions possess abundant freshwater but with smaller populations. Freshwater is mostly consumed by agriculture, which is approximately 70%. After that industries also use a lot of freshwater. It is shown that, countries with abundant water resources often have stronger agricultural economies, whereas water-scarce states face severe development constraints. These disparities mean that access to water can significantly influence economic growth, food security, and political stability. As a result, freshwater is increasingly viewed not merely as an environmental resource but as a strategic asset linked to national security and economic power.

Transboundary Rivers and Hydro-Political Rivalries



⁴ Ghali, Maghie. 2022. "How Water Cooperation Can Provide Geopolitical Stability in MENA." Al Jazeera. April 2, 2022. <https://www.aljazeera.com/news/2022/4/2/blue-peace-how-water-access-can-provide-mena-stability?>

As we have mentioned previously, due to shared water bodies, states may involve into transboundary water disputes at times. In such cases, upstream states often possess strategic advantages because they can control the flow of water through dams, reservoirs, and diversion projects. Meanwhile, the downstream states depend on the decision of the upstream. This dynamic can be seen in several river basins across the world:

The Nile Basin: This basin represents one of the most prominent examples of hydro-political tension. The construction of the Grand Ethiopian Renaissance Dam by Ethiopia on the Nile River has generated significant concerns in Egypt and Sudan. Egypt relies on the Nile for nearly 90 percent of its freshwater supply and views any reduction in water flow as a national security threat, while Ethiopia argues that the dam is essential for its development and energy security, as it will be the largest hydroelectric project in Africa.⁵

The Tigris–Euphrates Basin: Turkey has built a series of dams under the Southeastern Anatolia Project (GAP) to generate electricity and support agricultural irrigation. However, these projects have raised concerns in downstream countries such as Syria and Iraq, which depend heavily on these rivers for agriculture and drinking water. Reduced water flows have at times intensified regional tensions and complicated diplomatic relations among the three countries.

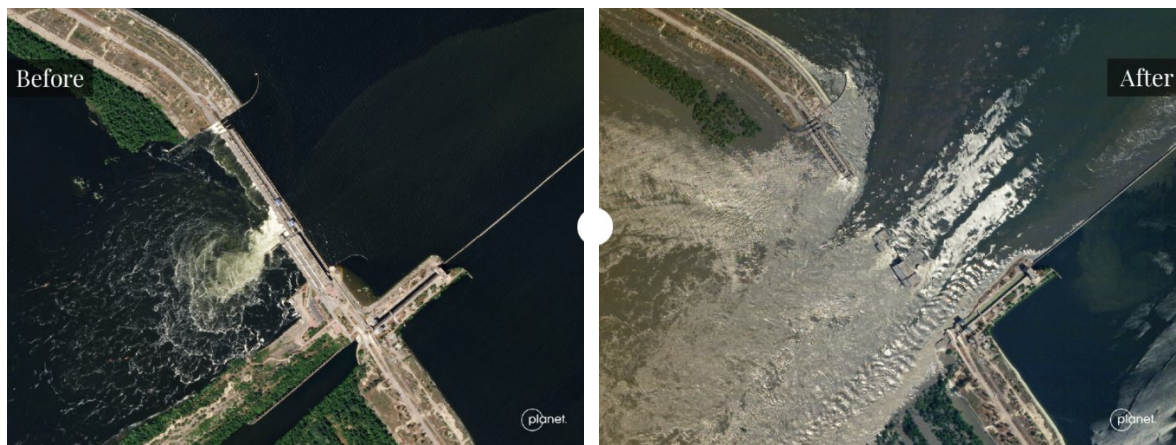
The Mekong River: The river originates in China and flows through several Southeast Asian states, including Laos, Thailand, Cambodia, and Vietnam. China has constructed multiple upstream dams for hydropower generation. It has led downstream countries to worry about reduced sediment flow, ecological degradation, and disruptions to fisheries that support millions of livelihoods.

The Brahmaputra Basin: Another river that originated from China but flows through South Asian countries like India and Bangladesh. Millions of people in northeastern India and Bangladesh rely on the Brahmaputra for agriculture and fisheries. China's dam construction and water diversion projects in the upper reaches have raised concerns in downstream countries regarding future water availability and ecological stability.

The Militarization of Water Infrastructure

⁵ Fanack Water. 2023. "Water Resources in Egypt." Fanack Water. July 5, 2023. <https://water.fanack.com/egypt/water-resources-in-egypt/>.

In the view of Blue Geopolitics, water infrastructures like dams, desalination plants, irrigation networks, and treatment facilities is no longer viewed solely through the lens of civil engineering or public utility. Instead, they have been integrated into military doctrine. This militarization of water infrastructure manifests in two primary ways: water infrastructure as a strategic target to cripple an opponent's home front, and as a tactical weapon to manipulate the physical battlefield, like "Hydraulic Warfare."⁶ In recent conflicts in the Middle East and Ukraine, we have seen parties seize control of dams to flood territories or cut off supplies to civilian populations to force submission. The destruction of the Kakhovka Dam significantly altered water flows in the Dnieper River basin, affecting both military operations and civilian populations.⁷



Satellite images show Kakhovka dam before and after destruction. Source: Al Jazeera

Modern warfare increasingly targets the nerves of a state. Because water is essential for electricity and industrial cooling, striking a water treatment plant or a pumping station can cause a collapse of urban life. We have seen this in recent Israel-Palestine conflict, where "water sieges" are used to force civilian displacement. Since October 2023, Israel's military operations have repeatedly targeted water facilities, wells, pipelines, desalination units, and sewage systems. 89% of Gaza's water and sanitation infrastructure has been damaged or destroyed by Israel's forces, leaving over

⁶ "Water as a Weapon | the Water Center at Penn." n.d. Watercenter.sas.upenn.edu.
<https://watercenter.sas.upenn.edu/splash/water-weapon>.

⁷ Noorali, Hassan, Yashar Zaki, Michael Campana, and Ali Taheri. 2025. "Hydropolitics of Russian-Ukrainian War: Analyzing Water Governance Conflicts in the Dnieper River Basin through Remote Sensing Techniques." *GeoJournal* 90 (3). <https://doi.org/10.1007/s10708-025-11338-0>.

90% of household's water insecure.⁸ For nations in arid regions, such as the Gulf States, the militarization of water presents an existential threat. These countries often rely on a few massive desalination plants. These facilities are targets highly vulnerable to drone strikes, cyber-attacks, or naval blockades. In a blue geopolitics framework, an adversary does not need to invade a country to defeat it; they only need to disable the software controlling the desalination pumps. This has led to the rapid integration of water infrastructure into national cyber-defense strategies.

When a city's water supply is cut, the resulting public health crisis acts as a "force multiplier" for the attacking military. When water is treated as a weapon, it ceases to be a resource and becomes a kinetic force of war. International humanitarian law, specifically the Additional Protocols to the Geneva Conventions, strictly prohibits attacking objects indispensable to the survival of the civilian population, such as drinking water installations.⁹

Water as Leverage and Conflict Catalyst

Upstream states often use water as a non-military tool, which is called "Hydro Hegemony." They use geographical position to dictate the terms of water use to downstream neighbors. By constructing massive dam projects, an upstream nation can effectively "bank" water, releasing it only when political or economic concessions are met. This creates a master-slave relationship in regional diplomacy, where the downstream state's entire economy; from its harvest cycles to its industrial output becomes a hostage to the upstream neighbor's domestic policy. The Teesta River serves as a definitive contemporary example of how water infrastructure and transboundary management act as both strategic leverage and a conflict catalyst. Flowing from the Himalayas through the Indian states of Sikkim and West Bengal before entering Bangladesh, the Teesta is the fourth-largest shared river between the two nations. It provides the "Blue Currency" that sustains

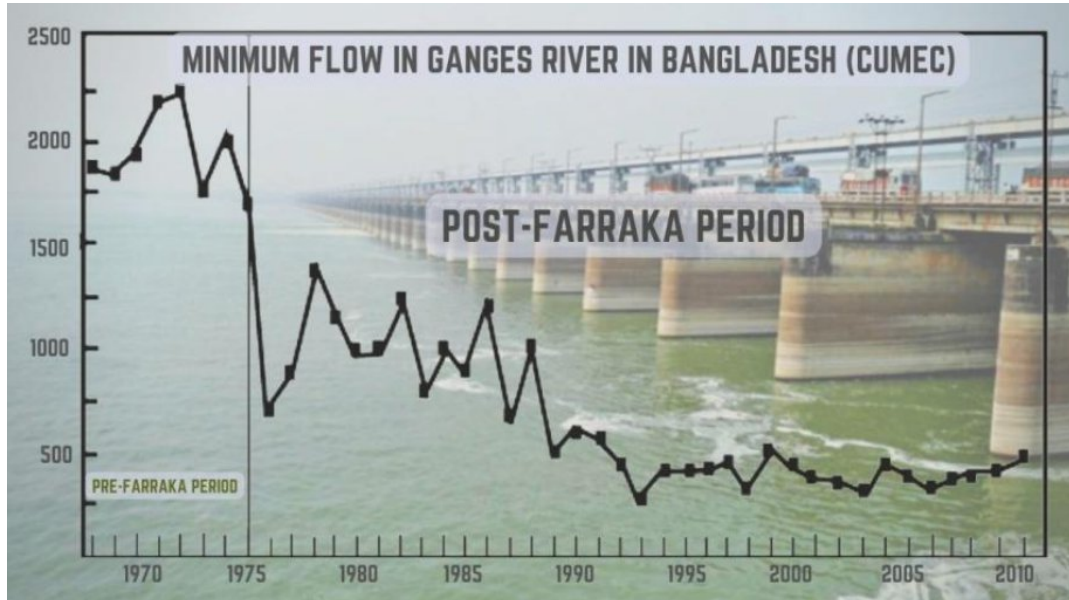
⁸ "'Thirst as a Weapon': UN Experts Condemn Israel's Deliberate Dehydration and Starvation of the Palestinian People." 2025. OHCHR. 2025. <https://www.ohchr.org/en/press-releases/2025/07/thirst-weapon-un-experts-condemn-israels-deliberate-dehydration-and>.

⁹ United Nations. 1977. "Protocol Additional to the Geneva Conventions of 12 August 1949, and Relating to the Protection of Victims of Non-International Armed Conflicts (Protocol II)." OHCHR. June 8, 1977. <https://www.ohchr.org/en/instruments-mechanisms/instruments/protocol-additional-geneva-conventions-12-august-1949-and-0>.

millions of farmers, yet it remains one of the most contentious "zero-sum" disputes in South Asia. In northern Bangladesh, the Teesta's shrinking flow is a direct catalyst for poverty. In early 2026, reports indicate that farmers in districts like Nilphamari are seeing their irrigation costs triple because they must rely on expensive deep-tube wells instead of the river.¹⁰ This "liquid poverty" leads to crop failures and forces thousands to migrate to Dhaka, creating social pressure and potential for unrest.

Implications for South Asia and Bangladesh

South Asia represents one of the most critical regions in the emerging landscape of blue geopolitics. The region's major rivers such as the Ganges, Brahmaputra, and Indus; cross multiple national borders and support hundreds of millions of people. The most pressing issue for South Asia in 2026 is the expiration of the 1996 Ganges Water Sharing Treaty between India and Bangladesh. Signed for a 30-year term, the agreement ends in December 2026. Negotiations for its renewal began in January 2026 under a shadow of heightened tension.



Decline in the flow of the Ganges River in Bangladesh due to the Farakka Barrage. SOURCE: COURTESY

¹⁰ <https://theclimatewatch.com/teesta-dries-up-northern-bangladesh-farmers-face-irrigation-crisis/>

For Bangladesh, water geopolitics is particularly significant because the country is a downstream state heavily dependent on upstream water flows from India and China. Issues such as the Teesta River dispute, upstream dam construction, and climate-induced changes in river flow patterns have direct implications for Bangladesh's agriculture, food security, and economic stability.

Moreover, rising sea levels and saltwater intrusion threaten freshwater supplies in Bangladesh's coastal regions. seawater intrusion in the southwestern delta has reached record levels. This salinity is destroying the "currency" of the soil, making vast tracts of land uncultivable and contaminating drinking water for millions. This creates a "Liquid Poverty" trap: farmers who lose their livelihoods due to water mismanagement become climate migrants, flocking to Dhaka and other urban centers. This mass migration is a catalyst for social unrest, demonstrating how blue geopolitics can dissolve the internal social contract of a nation.

While the Ganges is the primary concern for Bangladesh, the broader South Asian security architecture is being shaken by the potential collapse of the Indus Waters Treaty between India and Pakistan. In 2025-2026, India's decision to hold the treaty in abeyance following regional tensions has set a dangerous precedent. If the IWT which is once considered the most successful water treaty in the world, fails, it signals to other nations that water agreements are no longer "sacred" and can be suspended as a form of political sanction.

Policy Imperatives for 2026

The year 2026 stands as a pivotal moment for global water governance. UN Water Conference aimed at accelerating SDG 6 implementation amid worsening scarcity and geopolitical tensions.¹¹ With 2.2 billion lacking safe drinking water, renewed commitments to financing, monitoring, and rights-based approaches are essential. The growing strategic importance of water signals a profound transformation in global geopolitics. As freshwater scarcity intensifies, states are likely to view water resources with the same strategic urgency that once characterized oil politics. A primary policy imperative in 2026 is closing the "governance gap." Unlike climate or biodiversity, there is no single binding global framework for water. For regions like South Asia and Africa,

¹¹ United Nations. 2025. "Goal 6 | Department of Economic and Social Affairs." Sdgs.un.org. United Nations. 2025. <https://sdgs.un.org/goals/goal6>.

policies must integrate climate resilience with transboundary equity to avert conflicts over rivers like the Nile, Indus, and Teesta. Strengthening Transboundary Frameworks is also very important. Bangladesh must leverage the 2026 Ganges Treaty expiry to negotiate Teesta sharing. The future of blue geopolitics is not predetermined. Water can serve as both a catalyst for conflict and a foundation for cooperation. Effective governance, regional agreements, technological innovation, and sustainable resource management can mitigate tensions and transform shared water resources into opportunities for collaboration.