

Blue Gold and the Broken State: Water Scarcity as a Driver of Conflict

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When analysts speak of water and war, they reach instinctively for the dramatic image: a great dam closing upstream, a river switched off at a border, a pumping station struck from the air. These are real and growing dangers. They are also the exception. The more consequential relationship between water and conflict is quieter, slower and far harder to photograph. It is the steady erosion of the foundations on which fragile states rest — food, livelihoods, public health and the implicit bargain between ruler and ruled — as the water that sustains them runs short or turns unsafe. Water rarely fires the first shot. Far more often, it loosens the ground beneath a society until something else does.

This is the dimension of water security that Western strategic thinking has been slowest to absorb. Scarcity is filed under 'humanitarian' or 'development' until the day it resurfaces as instability, insurgency or mass displacement — at which point it becomes a security problem, and an expensive one. The argument of this essay is that the decisive water conflicts of this century will be fought less between states than within them, and that understanding how

scarcity hollows out governance is the key to anticipating the disorder of the coming decades rather than arriving late to manage it.

Water as a threat multiplier

The careful formulation, and the correct one, is that water scarcity is a threat multiplier rather than a direct cause of war. The United States Department of Defense adopted precisely this language in 2014, describing the effects of a changing climate — of which water stress is among the sharpest — as ‘threat multipliers’: forces that aggravate poverty, environmental degradation, political instability and social tensions abroad, and so create conditions in which terrorism and other forms of violence can take hold¹. The mechanism is indirect but powerful. When the rains fail and the wells run dry, agriculture collapses first; rural incomes follow; families move to cities already short of work and services; food prices climb; and the contract by which a government provides a minimum of security and subsistence begins to fray. None of this guarantees violence. But it widens the space in which grievance, opportunism and armed mobilisation can operate.

The scholarly debate has rightly insisted on this caution, and any serious treatment must observe it. Scarcity interacts with governance; it does not override it. A capable, legitimate state can absorb a drought that would break a brittle one. The analytically honest claim is therefore conditional: water stress raises the probability and intensity of conflict where states are already weak, unequal or distrusted. That conditionality is not a weakness of the argument. It is the argument — and it is precisely what makes water-driven instability foreseeable, and therefore preventable.

The Syrian laboratory

No case has been debated more fiercely than Syria, and none illustrates both the force and the limits of the thesis so well. Between roughly 2007 and 2010 Syria endured the most severe drought in its instrumental record. In an influential 2015 study, Colin Kelley and colleagues argued that a long-term warming and drying trend in the Fertile Crescent had made a drought of that severity two to three times more likely; that it devastated agriculture in the country’s north-eastern breadbasket; and that the flight of rural families towards the cities — whose population rose from 8.9 million in 2002 to 13.8 million in 2010 —

¹United States Department of Defense, *Quadrennial Defense Review 2014* (Washington, DC: Department of Defense, March 2014), p. 8, https://media.defense.gov/2020/May/18/2002302059/-1/-1/1/2014_QUADRENNIAL_DEFENSE_REVIEW.PDF.

compounded the pressures that erupted in 2011². Peter Gleick had advanced a related argument a year earlier³. The thesis passed quickly into political speech and headlines, with a confidence the underlying science did not warrant.

It was duly challenged. In 2017 Jan Selby and colleagues revisited the case and found the chain weak at every link: the evidence that human-induced climate change drove the drought was not clear-cut; the scale of drought-driven migration had been overstated; and there was no solid evidence that such migration contributed to the onset of war⁴. Selby later located the roots of north-eastern Syria's distress in a structural agrarian crisis of the state's own making: economic liberalisation after 2000, the super-exploitation of groundwater, and the halving of fuel subsidies in May 2008, which produced an overnight 342 per cent rise in the price of diesel for farmers who depended on pumped irrigation⁵. The exchange that followed was, at bottom, a dispute about monocausality — a position neither side need defend.

The defensible conclusion lies between the headline and its rebuttal. Drought did not 'cause' the Syrian war; nor was it irrelevant to it. It was one stressor among several, acting on a state that had already hollowed out its agricultural base and forfeited the trust of its rural periphery. Remove the drought, and the war might still have come; remove the misgovernment, and the drought would very probably have been survivable. Water scarcity was the accelerant, not the spark — which is exactly what the threat-multiplier thesis predicts, and exactly why Syria remains its most instructive, if most contested, laboratory.

Basra: when the taps fail

Scarcity need not take the form of drought to destabilise a state; it can arrive as a failure of quality. In the summer of 2018, in Basra — the centre of Iraq's oil industry — at least 118,000 people were hospitalised with symptoms that doctors linked to the quality of the

²Colin P. Kelley, Shahrzad Mohtadi, Mark A. Cane, Richard Seager and Yochanan Kushnir, 'Climate Change in the Fertile Crescent and Implications of the Recent Syrian Drought', *Proceedings of the National Academy of Sciences* 112, no. 11 (2015), pp. 3241–3246.

³Peter H. Gleick, 'Water, Drought, Climate Change, and Conflict in Syria', *Weather, Climate, and Society* 6 (2014), pp. 331–340.

⁴Jan Selby, Omar S. Dahi, Christiane Fröhlich and Mike Hulme, 'Climate Change and the Syrian Civil War Revisited', *Political Geography* 60 (2017), pp. 232–244.

⁵Jan Selby, 'On Blaming Climate Change for the Syrian Civil War', *Middle East Report* 296 (2020), <https://merip.org/2020/10/on-blaming-climate-change-for-the-syrian-civil-war-296/>.

water supply, and the crisis spilled over into violent protest⁶. Human Rights Watch traced the emergency not to a single shock but to successive government failures dating back to the 1980s: poor management of upstream water resources, inadequate regulation of pollution, and river flows diminished by upstream damming and lower rainfall⁷.

The Basra episode deserves more strategic attention than it has received, because it isolates the mechanism with unusual clarity. In the capital of Iraq's oil wealth, the trigger for unrest was not oil but water. When a state cannot deliver safe water to its people, the failure is experienced not as an engineering fault but as a breach of legitimacy — immediate, physical and impossible to explain away. Water is the public good through which citizens most directly measure whether their government works. That is why its failure converts so quickly into anger, and why water security belongs as much to the study of internal stability as to the study of rivers and borders.

The Sahel and the conflict trap

If Syria shows the thesis under dispute and Basra shows it in a single city, the Lake Chad basin shows it operating across an entire region. Since the 1960s the lake has contracted by some 90 per cent under the combined weight of climate change, overuse and unplanned irrigation; its waters were partly replenished at the end of the 1990s and have since stabilised, but at a fraction of their former extent⁸. The lake once sustained more than thirty million people across Nigeria, Niger, Chad and Cameroon⁹. As the water retreated, fishing and farming livelihoods collapsed, herders and cultivators fell into violent competition over the shrinking margins, and the jihadist movement known as Boko Haram exploited the resulting loss of livelihoods to recruit among the young and the impoverished¹⁰.

Here too the relationship is not mechanical. Boko Haram is a product of ideology, state neglect and regional politics as much as of a dying lake. But the lake is what turned a pool of

⁶Human Rights Watch, *Basra is Thirsty: Iraq's Failure to Manage the Water Crisis* (New York: Human Rights Watch, July 2019), <https://www.hrw.org/news/2019/07/22/iraq-water-crisis-basra>.

⁷Ibid.

⁸GEOGLAM Crop Monitor, *Lake Chad Basin: Conflict and Food Insecurity*, Special Report (updated 13 August 2020), https://www.cropmonitor.org/s/Special_Report_20200801_Lake_Chad_Basin.pdf.

⁹Eleonora Cammarano, 'The Hidden Crisis of Lake Chad: How Environmental Degradation Fuels Boko Haram', *Katoikos*, 20 June 2024, <https://katoikos.world/analysis/the-hidden-crisis-of-lake-chad-how-environmental-degradation-fuels-boko-haram.html>.

¹⁰Saheed Babajide Owonikoko, 'The Key to Peace in the Lake Chad Area Is Water, Not Military Action', *The Conversation*, 2 October 2020, <https://theconversation.com/the-key-to-peace-in-the-lake-chad-area-is-water-not-military-action-146152>.

grievance into a pool of recruits, and what locked four states into what analysts aptly call a conflict trap: violence degrades the governance and investment that might restore the basin, and the degraded basin feeds further violence. Nigeria alone devoted close to \$21 billion to defence between 2009 and 2018, a substantial share of it to the fight against the insurgency¹¹ — an enormous outlay against a threat whose root cause no quantity of firepower can reach. It is the Syrian pattern without the academic controversy.

The coming geography of scarcity

These are not isolated misfortunes but early instances of a global trend. According to the World Resources Institute, twenty-five countries — home to a quarter of humanity — now face extremely high water stress every year, regularly drawing down almost their entire renewable supply, while around four billion people live under highly water-stressed conditions for at least one month annually¹². By 2050, even on an optimistic warming path, a further billion people are expected to join the first group, global demand is projected to rise by a fifth to a quarter, and the entire population of the Middle East and North Africa is expected to live under extremely high stress¹³.

Laid over a map, these figures trace a familiar arc. The belt of extreme water stress runs through the Fertile Crescent, the Sahel, the Horn of Africa and South Asia — very nearly every region into which Western governments have been drawn, at great cost, to contain conflict and its overflow in migration and extremism. The correlation is not coincidental. Where water fails, states weaken; where states weaken, disorders follow that eventually reach Western borders and summon Western deployments. The geography of thirst is becoming the geography of intervention.

Closing the blind spot

The practical failure is one of category. Water scarcity is managed by development ministries and humanitarian agencies, and reaches the security establishment only once it has matured into crisis — the most expensive moment at which to act. Correcting this requires no grand new doctrine, only a reclassification and a few disciplined habits.

¹¹Ibid.

¹²World Resources Institute, '25 Countries, Housing One-Quarter of the Population, Face Extremely High Water Stress', August 2023, <https://www.wri.org/insights/highest-water-stressed-countries>.

¹³Ibid.

First, water should be written into strategic foresight and conflict early warning as a standing variable rather than confined to climate annexes; hydrological stress is among the more forecastable drivers of instability, and the data to track it already exist. Second, support for transboundary cooperation and basin institutions should be understood as conflict prevention and funded accordingly — a river commission sustained before collapse costs a fraction of a stabilisation mission after it. Third, investment in urban water systems in fragile states should be treated as an investment in their legitimacy, since, as Basra showed, the failing tap is where a population first concludes that its government has failed. Fourth, defence planners should treat water-driven displacement and recruitment as foreseeable operating conditions in fragile theatres, not as surprises. And fifth, the migration and radicalisation that scarcity feeds are best addressed at the source, in the basins themselves, rather than at the fences and coastlines where their consequences finally arrive.

Conclusion

None of this treats water as destiny. The point is the opposite: because scarcity acts through governance, it is a danger that foresight and cooperation can still blunt. What cannot be afforded is the habit of regarding water as someone else's humanitarian concern. The belt of extreme stress already reaches the developed world — Greece itself is among the twenty-five most water-stressed countries on earth¹⁴. The struggle over the blue gold is not a distant prospect for other peoples in other decades. It is a structural feature of the century we have entered, and it will be waged, in the first instance, not between states but within them — in the quiet collapse of societies that ran short of water before they ran short of enemies.

¹⁴Ibid.

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