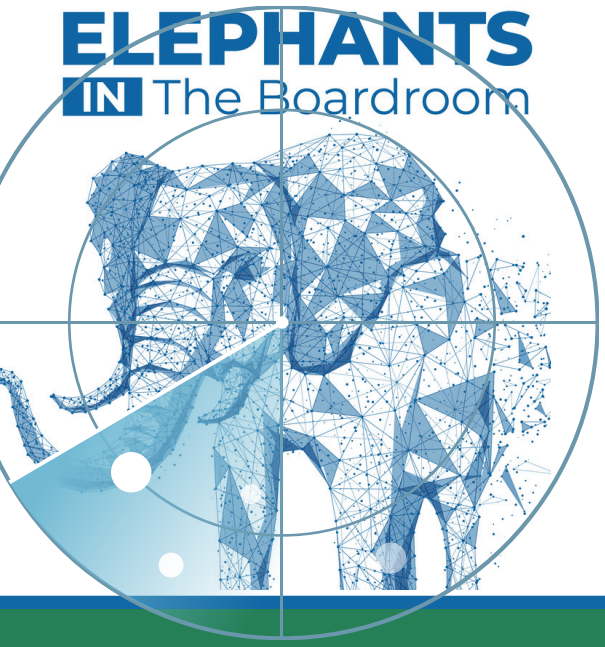
ELEPHANTS IN The Boardroom



Water Wars

The Rising Tide of Water Scarcity, Conflict, and Opportunity in a Thirsty World

STRATEGIC ALERT BULLETIN

STATUS: RESTLESS	RANKING: EXTREME FORCE	SCORE: 106

"Where water flows, prosperity follows."
— Kitty van der Heijden, UNICEF Assistant Secretary-General —

Forward-looking companies are repositioning water from an operational constraint to a strategic enabler. Those investing in water innovation today are laying the foundations for long-term competitive advantage.

1) WHAT'S PINGING ON OUR RADAR

- **India's Chenab River manipulation (May 2025):** A 24-hour blockade reduced flow to Pakistan by 90%, followed by a sudden release of 28,000 cusecs, triggering flood alerts in Sialkot and Gujrat. This marks the first overt use of water as a coercive tool since India suspended the Indus Waters Treaty (IWT) in April 2025.
- **Economic timebomb:** The Hindu Kush Himalaya (HKH) region is the source of 10 major Asian river systems, providing water for nearly 2 billion people and underpinning food, energy, and industry across Asia. Climate-driven glacier loss threatens to disrupt these flows, exposing 31% of global GDP ($70 trillion) to high water stress by 2050 and risking 7–12% GDP losses in India, China, and Central Asia if water management fails.
- **Flashpoint proliferation:** 45 countries experienced water-related conflicts in 2024, with machine-learning models identifying 2,000+ emerging hotspots
- **Surge in weaponisation:** The Pacific Institute's Water Conflict Chronology reports a 40% YoY increase in water-related violence since 2020, with 1,632 documented cases in 2024 alone.

2) WHY THIS MATTERS

- **Financial Exposure Rising:** By 2050, 31% of global GDP ($70T) will be in high water stress zones. Companies already face $77B in near-term supply chain risks. Most CFOs underestimate water costs by 3–5x.
- **Supply Chain Fragility:** 20% of multinationals report critical water risks; only 21% have contingency plans. Simultaneous disruption across agriculture, semiconductors, textiles, and energy will neutralise location diversification.
- **Credit Risk Realignment:** Moody's flags $2T in debt across eight sectors as water-exposed. Water stress now influences sovereign ratings and appears in 40% more SEC filings YoY.
- **Operational Sensitivity:** Water outages cost manufacturers $120K–$240K/day and data centres $7K–$10K/min. Few systems have redundancy to absorb cascading water-energy failures.
- **Geopolitical Risk:** Water is being used as leverage. The Chenab River blockade shows how swiftly supply disruption can escalate, putting cross-border assets at risk.

3) STRATEGIC ACTIONS TO CONSIDER

Leaders should view water volatility not as risk, but as a strategic opportunity that will reshape markets and create unprecedented business opportunities:

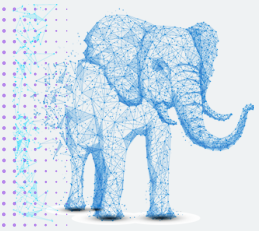
- **Capture the $650B Water Tech Boom:** The water treatment market is projected to reach $650B by 2034 (6.5% CAGR). Companies pioneering technologies that reduce water usage by 30-50% are achieving valuation premiums of 40-60% compared to industry averages.
- **Pioneer Circular Water Systems:** Closed-loop water strategies are cutting costs by 15–25% and unlocking new revenue through resource recovery. Leading firms are extracting minerals from wastewater or converting byproducts into energy—turning cost centres into profit engines, with ROI reaching 200–300%.
- **Turn Water Risk into Financial Advantage:** Companies with sophisticated water accounting are securing financing at 40-80 basis points below competitors, while attracting investment from the $1.3 trillion in ESG-focused capital increasingly screening for water security metrics.
- **The Kairos Opportunity:** Unlike traditional resource constraints, water challenges cross all industries, governments, and communities-creating an unprecedented platform for businesses to demonstrate systemic leadership and capture extraordinary value.

tomorrowtoday CONSULTING
Where Visionary Thinking Meets Strategic Execution

WE ARE NOT JUST WITNESSING CHANGE

We Are Living through a Kairos Moment

Kairos are rare, opportune moments when forces of progress collide and conditions align for transformative change. Grey Elephants are driving this shift. For bold leaders, Kairos is a once-in-a-century opportunity to shape the future.



These seven **Great Grey Elephants** are highly probable, high-impact, yet often ignored forces of change—driving the transformative shifts unfolding today.

Ageing: An unprecedented global demographic shift is reshaping workforces, healthcare, and economic power.

Angry Planet: Wildfires, floods, droughts, and biodiversity loss are shaking the foundations of human security and economic stability.

Rising Rage: Inequality, distrust, and economic pressure are fuelling anger, extremism, and social polarisation.

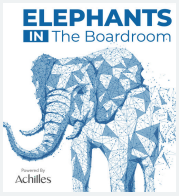
Societal Fractures: Norms, values and post-war institutions are straining under 21st-century pressures—old systems may collapse or be radically reimagined.

Multipolarity: Global power is fragmenting as new blocs emerge, reshaping trade, influence, and the future of globalisation.

The Big Squeezes: The era of low-cost abundance is ending, giving way to mounting pressure on global supply chains, inflation and critical resources

Intelligent Advances: AI, biotech, and exponential tech are redefining humanity—either unlocking progress or deepening inequality.

Listen to the podcast **Elephants in the Boardroom** for bold conversations, future-focused insights, and the strategies leaders need to thrive in transformative times.



STAY AHEAD OF THE CURVE

By Learning to Dance with the Elephants.

TTC offers:

01 Strategic & Real-Time Insights

Stay ahead with real-time signals and deep strategic awareness:

- Strategic Alert Bulletins – Timely trend updates
- Radar Reports – Quarterly Grey Elephant scans
- Real-Time Alerts – Immediate disruption signals
- Sector Intelligence – Industry-specific insights
- Executive Briefings – Curated foresight

02 Future & Scenario Planning

Seize Kairos opportunities, explore critical futures, and design bold strategic responses:

- Leadership Sprints – Fast-track strategic alignment
- Scenario Planning – What-if pathways and strategies
- Deep Dive Analysis – Custom exploration
- Strategy Reviews – Annual strategic health checks

03 Strategy Activation

Translate insight into action and alignment:

- Quarterly Strategic Sprints – Focused execution
- Scenario-to-Strategy Playbooks – What-if thinking
- Exec Workshops – Embed foresight into strategy
- Activation Frameworks – Tools to drive action

04 Inspiration & Engagement

Ignite momentum with bold, future-focused sessions

- Keynotes & Workshops – Inform and energise teams
- Founder-Led Strategy Sessions – Exclusive facilitation

tomorrowtoday.consulting

dean@tomorrowtoday.consulting