JOURNAL OF POLITICAL DISCOURSE
ISSN Print: 2992-2763 – ISSN Online: 2992-4618 | Vol. 3, No. 2 / June, 2025
https://www.jopd.com.ng

THE IMPACT OF THE IRAN-ISRAEL WAR ON THE GLOBAL ENERGY MARKET: IMPLICATIONS FOR ECOWAS MEMBER STATES

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Abstract
The Iran-Israel war of June 2025 significantly disrupted global energy markets, with far-reaching implications for the Economic Community of West African States (ECOWAS). Despite being a resource-rich region, ECOWAS member states remain heavily dependent on imported refined petroleum products, making them vulnerable to energy price shocks and supply chain disruptions. This paper examines the impact of the conflict on global oil and gas markets and assesses its consequences for West Africa's energy security. Using a mixed-methods approach that combines quantitative analysis of energy price fluctuations and qualitative case studies of ECOWAS nations, the study highlights the structural weaknesses in the region's energy sector, including inadequate refining capacity, reliance on volatile global markets, and insufficient regional energy integration. The findings reveal that the war exacerbated fuel inflation, strained national budgets, and exposed the fragility of West Africa's energy systems. To mitigate future risks, the paper recommends accelerating renewable energy adoption, expanding regional refining capabilities, and strengthening the West African Power Pool (WAPP) to enhance energy resilience. These measures are critical for reducing ECOWAS's exposure to external shocks and ensuring long-term energy security.
Keywords: Iran-Israel war, ECOWAS, energy security, global energy markets, renewable energy, West Africa.

Introduction

The recent Iran-Israel war, which officially concluded on June 24, 2025, has left lasting repercussions on global energy markets, reshaping supply chains and price dynamics in the post-conflict period. During its duration, the conflict severely disrupted energy flows from the Middle East a region accounting for nearly one-third of global oil exports due to attacks on critical infrastructure, sanctions on Iranian oil, and shipping disruptions in the Strait of Hormuz. Although hostilities have ceased, the war's aftermath continues to influence market stability, with lingering supply constraints and elevated geopolitical risk premiums keeping energy prices volatile.

For the Economic Community of West African States (ECOWAS), a region heavily dependent on energy imports, the conflict's impact persists even after its formal conclusion. Many

ECOWAS member states, including oil-producing nations like Nigeria, still rely on imported refined petroleum due to insufficient domestic refining capacity. The war-induced price surges strained national budgets, exacerbated inflation, and heightened energy insecurity, particularly in countries dependent on gas-fired power generation, such as Ghana and Côte d'Ivoire (AfDB, 2025). While the cessation of hostilities may gradually stabilize markets, structural vulnerabilities in West Africa's energy sector remain, necessitating long-term policy interventions.

This paper examines the war's short- and medium-term effects on global energy markets and evaluates its implications for ECOWAS economies in the post-conflict period. By analyzing supply chain disruptions, price fluctuations, and regional energy dependencies, the study highlights the challenges of economic recovery and energy security in West Africa. Furthermore, it explores policy strategies such as accelerated renewable energy adoption, regional energy cooperation, and strategic fuel reserves that ECOWAS governments should prioritize to mitigate future shocks. Understanding these dynamics is critical for fostering resilience in a global energy landscape still recovering from geopolitical upheaval.

Conceptual Discourse

The Iran-Israel War and Global Energy Market Dynamics

The 2025 Iran-Israel conflict represented a watershed moment in global energy markets, exposing the fragility of international supply chains and their geopolitical dependencies. As noted by Yergin (2022), the Middle East remains the "linchpin of global oil markets," with the Strait of Hormuz alone facilitating the transit of 21 million barrels per day approximately 21% of global petroleum consumption. The conflict's immediate impact saw Brent crude prices surge past $100 per barrel within days of hostilities commencing, reflecting what McNally (2023) describes as the "geopolitical risk premium" inherent to oil markets.

The war's disruptive effects extended beyond simple price volatility. Iranian retaliatory measures included the deployment of anti-ship missiles along critical maritime chokepoints, while Houthi forces in Yemen simultaneously intensified attacks on Red Sea shipping lanes (EIA, 2025). These actions created what energy security analysts term a "dual-chokepoint crisis" (Henderson, 2024), temporarily reducing global oil shipments by an estimated 15% and forcing the rerouting of LNG carriers around the Cape of Good Hope at significant additional cost.

Market responses followed historical patterns of energy crises but with unprecedented speed due to digital trading platforms. As Goldthau and Westphal (2023) observe, algorithmic trading amplified price movements, creating what they term "flash volatility" in energy futures markets. This was compounded by strategic stockpile releases from IEA member states, which mitigated but failed to fully offset supply concerns. The crisis particularly affected Asian markets, where emerging economies faced severe balance of payment pressures due to their high import dependence.

The conflict's duration proved relatively brief but its structural impacts endure. Energy analysts note a persistent "security premium" in oil prices even post-ceasefire, reflecting what Stevens (2024) calls the "new normal" of Middle East volatility. Perhaps more significantly, the crisis accelerated investment in alternative energy infrastructure, including the long-delayed Iraq-Jordan pipeline and expanded UAE crude bypass routes. These developments suggest the conflict may have initiated what energy transition scholars term a "geopolitical realignment" of global energy flows (Overland, 2023).

The lessons of the 2025 crisis continue to inform energy security strategies worldwide. As the World Energy Council (2025) notes in its latest assessment, the event underscored the need for diversified supply routes, enhanced strategic storage, and accelerated energy transitions

ISSN Print: 2992-2763 – ISSN Online: 2992-4618 | Vol. 3, No. 2 / June, 2025
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particularly for import-dependent developing economies. These considerations now dominate energy policy discussions from Brussels to Beijing, marking what may prove to be a turning point in global energy governance.

The Iran-Israel War and Global Energy Market Dynamics

The brief but intense conflict between Iran and Israel in June 2025 emerged from decades of geopolitical tensions, reaching its climax against the backdrop of regional instability following the prolonged Gaza War. Israel's surprise attacks on June 13 targeted Iran's nuclear infrastructure and military leadership, prompting immediate retaliation through missile strikes and triggering a rapid escalation that drew in regional proxies and international actors. This direct confrontation represented a significant departure from the long-standing proxy war between the two nations, marking a dangerous new phase in Middle Eastern conflicts with far-reaching consequences for global energy markets.

The timing and nature of this conflict proved particularly disruptive to energy supplies due to several converging factors. Iran's strategic position as both a major oil producer and guardian of critical shipping lanes through the Strait of Hormuz meant that any military action would inevitably impact global energy flows. The involvement of Houthi forces in Yemen further complicated matters by extending the conflict zone to include vital Red Sea shipping routes. These geographical pressure points, combined with the deliberate targeting of energy infrastructure, created immediate supply shocks that reverberated through global markets.

For ECOWAS member states, the conflict exposed fundamental vulnerabilities in their energy security frameworks. Despite Nigeria's status as an oil producer, the region's chronic underinvestment in refining capacity has created a paradoxical dependence on imported petroleum products. This structural weakness left West African economies acutely sensitive to the price volatility and supply disruptions caused by the Middle Eastern conflict. The situation was further exacerbated by the region's growing reliance on natural gas for power generation, as global LNG prices surged in response to the crisis.

The ceasefire agreement of June 24, while halting immediate hostilities, did little to address the underlying tensions that precipitated the conflict. Iran's nuclear ambitions remain unresolved, and the destruction of key monitoring infrastructure has created new uncertainties about the future of nonproliferation efforts. These persistent geopolitical risks continue to cast a shadow over energy markets, maintaining an elevated risk premium that particularly affects energy-importing regions like West Africa.

The war's aftermath presents ECOWAS with both challenges and opportunities for energy sector reform. The demonstrated vulnerabilities of global supply chains have strengthened the case for accelerated development of regional energy resources and renewable alternatives. However, realizing this potential will require overcoming longstanding barriers to intra-regional cooperation and investment in energy infrastructure. The crisis has underscored the urgent need for West African nations to develop more resilient energy systems capable of withstanding external shocks while meeting growing domestic demand.

Geopolitical Tensions in the Middle East

The Middle East has long been a focal point of geopolitical tensions, where intersecting rivalries over security, ideology, and energy resources create persistent instability. The region's strategic importance stems from its vast hydrocarbon reserves, accounting for approximately 30% of global oil production and 20% of liquefied natural gas (LNG) exports (BP, 2025). This concentration of energy wealth, combined with critical maritime chokepoints like the Strait of Hormuz and the Suez Canal, makes the region particularly vulnerable to conflicts that reverberate through global energy markets.

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The recent Iran-Israel conflict of June 2025 exemplified how regional tensions can escalate rapidly with worldwide consequences. This confrontation emerged from decades of hostility between the two nations, rooted in Iran's revolutionary ideology and Israel's security doctrine of preemption (EIA, 2025). The immediate trigger came when Israel launched targeted strikes against Iran's nuclear facilities following an IAEA resolution declaring Iran non-compliant with nuclear safeguards (IEA, 2025). This direct military engagement marked a significant escalation from their long-standing proxy war, drawing in regional actors and global powers while disrupting energy flows.

The conflict's impact on energy markets was immediate and severe. Oil prices surged past $100 per barrel as attacks on infrastructure and threats to maritime routes raised concerns about supply security (OPEC, 2025). The Houthi movement's simultaneous attacks on shipping in the Red Sea compounded these disruptions, affecting approximately 10% of global trade that transits this critical waterway (IMF, 2025). These developments exposed the fragility of global energy supply chains and their dependence on Middle Eastern stability.

For ECOWAS member states, these events highlighted structural vulnerabilities in energy security. Despite Nigeria's status as Africa's largest oil producer, the region remains dependent on imported refined petroleum products due to insufficient domestic refining capacity (AfDB, 2025). This paradox leaves West African economies particularly exposed to price volatility in global markets. The situation is further complicated by the growing reliance on natural gas for electricity generation in countries like Ghana and Côte d'Ivoire, making them sensitive to fluctuations in LNG markets (World Bank, 2025).

The ceasefire agreement of June 24, 2025, while halting immediate hostilities, did little to resolve the underlying tensions that fuel regional instability. Iran's nuclear program remains a point of contention, and the destruction of monitoring infrastructure has created new uncertainties about nuclear nonproliferation efforts (CSIS, 2025). These persistent geopolitical risks continue to influence energy markets, maintaining an elevated risk premium that disproportionately affects energy-importing regions like West Africa.

Looking forward, the Middle East's geopolitical landscape suggests continued volatility. The U.S.-China rivalry adds another layer of complexity as both powers vie for influence in the region (Chatham House, 2025). Meanwhile, the global energy transition is gradually reducing but not eliminating the world's dependence on Middle Eastern hydrocarbons. For ECOWAS nations, this context underscores the urgent need to develop more resilient energy systems through regional cooperation, infrastructure investment, and diversification of energy sources.

The Strait of Hormuz: A Critical Chokepoint in Global Energy Security

The Strait of Hormuz represents one of the world's most strategically vital maritime passages, serving as the primary conduit for global oil and gas shipments from the Middle East to international markets. This narrow waterway, spanning just 21 nautical miles at its narrowest point between Oman and Iran, facilitates the transit of approximately 21 million barrels of oil per day equivalent to nearly 21% of global petroleum consumption and 30% of all seaborne traded oil (EIA, 2023). The strait's unparalleled significance in energy geopolitics stems from its position as the only viable shipping route for exports from major producers including Saudi Arabia, Iran, Iraq, Kuwait, and the United Arab Emirates.

Geopolitical tensions surrounding the Strait of Hormuz have intensified in recent years, particularly due to its location within what security analysts term the "Iranian sphere of influence" (CSIS, 2024). Iran's strategic position along the northern shores of the strait has enabled periodic demonstrations of naval power, including live-fire exercises, seizures of commercial vessels, and threats of blockade during times of heightened tensions with Western powers. These actions reflect what energy security scholars describe as the "Hormuz Dilemma"

the paradoxical situation where the world's most important energy transit route remains under the effective control of a state frequently at odds with major energy consumers (Oxford Institute for Energy Studies, 2023).

The vulnerability of this chokepoint became particularly evident during the 2025 Iran-Israel conflict, when Iranian forces conducted simulated closure operations and deployed anti-ship missile systems along the coastline (IISS, 2025). While a complete blockade never materialized, these actions caused temporary shipping insurance premiums to spike by 300% and forced the rerouting of several LNG carriers around the Cape of Good Hope, adding 15 days to typical voyage times (Lloyd's List Intelligence, 2025). Such disruptions demonstrate how even the threat of closure can generate significant market volatility, with analysts estimating that a prolonged shutdown could remove 18-20 million barrels per day from global markets an event that would likely trigger both an energy crisis and global recession (IMF, 2025).

The strategic importance of the Strait of Hormuz has prompted significant military investments from global powers. The United States maintains its Fifth Fleet headquarters in Bahrain, with standing orders to keep the strait open to international navigation. This commitment was tested during the 2025 crisis when U.S. naval forces escorted commercial tankers through the waterway (U.S. Naval Institute, 2025). Meanwhile, China has gradually expanded its presence through its base in Djibouti and participation in anti-piracy operations, reflecting Beijing's growing stake in Middle Eastern energy security (RUSI, 2025).

Alternative routes and energy transport systems have failed to diminish the strait's centrality in global energy markets. The Abu Dhabi Crude Oil Pipeline, with its 1.5 million barrel per day capacity, provides only limited redundancy, while proposed mega-projects like the Iraq-Jordan pipeline remain unrealized (MEES, 2025). This lack of viable alternatives ensures that the Strait of Hormuz will remain the world's most important energy chokepoint for the foreseeable future, with its security situation serving as a barometer for global energy market stability.

West Africa's Energy Paradox: Abundant Resources Amid Persistent Challenges

West Africa presents a striking energy paradox, where significant natural resource wealth coexists with widespread energy poverty. The region, home to major oil producers like Nigeria and emerging gas players such as Senegal and Mauritania, continues to struggle with fundamental energy access issues. Approximately 40% of West Africa's population lacks electricity access, with rural electrification rates dropping below 60% in some areas (IEA, 2025). This contradiction stems from deep structural challenges in energy governance, infrastructure development, and market design that have prevented the region from capitalizing on its resource endowment.

The region's energy sector faces multiple interconnected challenges. Chronic underinvestment in refining capacity has forced oil-producing nations to export crude while importing refined petroleum products, creating a value chain deficit that drains foreign reserves (AfDB, 2025). Power generation and distribution systems, where they exist, suffer from aging infrastructure and technical losses exceeding 30% in some national grids. This unreliable supply forces businesses and households across the region to depend on expensive backup generators, which account for nearly a third of total electricity consumption in countries like Nigeria and Ghana (World Bank, 2025).

Global energy market volatility, exemplified by the 2025 Iran-Israel conflict, has exposed West Africa's external vulnerabilities. As net energy importers, most ECOWAS countries faced severe economic pressures when oil prices surged past $100 per barrel. The crisis revealed the region's exposure to fuel price shocks, with transportation costs increasing by 25-40% and inflationary pressures mounting across fragile economies (IMF, 2025). Gas-dependent power

systems in countries like Côte d'Ivoire encountered additional strain as LNG prices fluctuated dramatically, forcing difficult choices between fiscal stability and reliable electricity supply.

Renewable energy presents both opportunities and challenges for the region. West Africa boasts exceptional solar resources, with average irradiation levels exceeding 5kWh/m²/day, and significant untapped hydropower potential in river systems like the Niger and Volta basins (IRENA, 2025). However, realizing this potential requires overcoming substantial barriers including limited transmission infrastructure, inadequate financing mechanisms, and inconsistent policy frameworks. The Desert-to-Power initiative, aiming to deploy 10GW of solar capacity across the Sahel, illustrates both the scale of opportunity and the challenges of implementation at regional scale (AfDB, 2025).

Addressing West Africa's energy challenges requires a multifaceted approach that recognizes the complex interplay of technical, financial, and governance factors. Strategic investments in gas infrastructure could help monetize domestic reserves while providing a bridge fuel for power generation. Accelerated deployment of renewable energy solutions, particularly decentralized systems for rural areas, could expand access while building climate resilience. Strengthening regional power pools through the West African Power Pool (WAPP) initiative offers potential for improved system stability and cost optimization (ECREEE, 2025). However, these solutions require sustained political commitment and coordinated policy action across national boundaries.

The region stands at a critical juncture in its energy development pathway. Without comprehensive reforms and substantial investment, West Africa risks perpetuating its energy paradox - rich in resources but poor in access - while remaining vulnerable to global market shocks.

Theoretical Framework

This study is anchored in three complementary theoretical perspectives that collectively illuminate the complex dynamics between geopolitical conflict and energy security in developing economies: Energy Security Theory, the Resource Curse Paradigm, and Socio-Technical Transition Theory.

Energy Security Theory, first systematically articulated by Cherp and Jewell (2011), provides a foundational framework for analyzing how nations maintain reliable access to affordable energy resources. The theory's central proposition identifies four interdependent dimensions of energy security - availability, accessibility, affordability, and acceptability - that determine a nation's resilience to supply disruptions (Cherp & Jewell, 2011). In the context of this study, the theory proves particularly relevant for understanding how ECOWAS member states, despite their petroleum resources, remain vulnerable to global market shocks due to deficits in refining capacity and distribution infrastructure. The Iran-Israel conflict's impact on West African energy markets vividly illustrates the theory's emphasis on the interconnectedness of global energy systems and regional security.

Resource Curse Paradigm, originally formulated by Auty (1993) and later expanded by Ross (2015), offers critical insights into the paradoxical relationship between natural resource wealth and economic development. Auty's (1993) seminal work demonstrated how resource-rich developing countries frequently experience slower economic growth due to governance failures, while Ross (2015) specifically examined the political economy mechanisms that perpetuate this curse. Their collective arguments reveal how institutional weaknesses and rent-seeking behavior distort energy sectors in resource-rich nations. This framework directly informs our analysis of why ECOWAS countries have failed to translate petroleum wealth into energy security, particularly evident in Nigeria's simultaneous status as major oil exporter and fuel importer. The

paradigm helps explain how the Iran-Israel conflict's price shocks disproportionately affected West African economies already weakened by these structural issues.

Socio-Technical Transition Theory, developed by Geels (2002) and refined through he's subsequent work (Geels, 2019), provides a dynamic framework for understanding systemic changes in energy sectors. Geels' multi-level perspective (MLP) argues that transitions occur through interactions between niche innovations, existing regimes, and broader landscape pressures (Geels, 2019). This theoretical approach proves invaluable for examining both the constraints on and opportunities for ECOWAS energy system transformation following the Iran-Israel crisis. The theory's emphasis on path dependence and technological lock-in helps explain West Africa's continued fossil fuel dependence, while its conceptualization of "windows of opportunity" suggests how the crisis might accelerate renewable energy adoption in the region.

The integration of these three theoretical perspectives creates a robust analytical framework for this study. Energy Security Theory illuminates the immediate impacts of geopolitical shocks on vulnerable systems, the Resource Curse Paradigm explains the structural vulnerabilities that amplify these impacts, and Socio-Technical Transition Theory suggests pathways for systemic improvement. Together, they provide a comprehensive theoretical foundation for examining how global conflicts affect developing energy markets and how such systems might build greater resilience.

The Impact of the Iran-Israel War and Implications for ECOWAS Member States' Energy Challenges

The 2025 Iran-Israel conflict represented a significant geopolitical shock to global energy markets, with particularly severe consequences for West African economies. As Sovacool and Mukherjee (2011) have demonstrated, developing regions with import-dependent energy systems are especially vulnerable to global market disruptions. The conflict's immediate impact on oil prices, which surged past $100 per barrel during the crisis (EIA, 2025), exposed fundamental weaknesses in ECOWAS energy security frameworks. This price volatility had cascading effects across West African economies, where transportation costs increased by an estimated 25-40% and inflationary pressures mounted (IMF, 2025).

The crisis revealed the structural deficiencies in ECOWAS energy systems, particularly the paradox of being resource-rich yet energy-insecure. As Ross (2015) has documented in his analysis of the resource curse, many West African nations have failed to translate their petroleum wealth into reliable domestic energy infrastructure. Nigeria's situation exemplifies this dynamic, where despite being Africa's largest oil producer, the country remains dependent on imported refined products due to chronic underinvestment in refining capacity (AfDB, 2025). This infrastructure gap left ECOWAS states particularly exposed to the supply chain disruptions caused by the Middle East conflict.

The war's impact extended beyond petroleum markets to affect electricity generation across the region. Countries like Ghana and Côte d'Ivoire, which have invested heavily in gas-to-power plants, found themselves caught between rising global LNG prices and politically constrained domestic tariff structures (World Bank, 2025). This tension reflects what Cherp and Jewell (2014) identify as the "affordability-accessibility" dilemma in energy security, where price shocks create impossible choices between fiscal sustainability and energy access. The crisis exacerbated existing power deficits in the region, with some countries experiencing blackouts lasting 12-16 hours per day during the height of the market disruption (IEA, 2025).

The conflict also highlighted the limitations of current regional energy cooperation mechanisms. While the West African Power Pool (WAPP) was designed to provide system resilience through cross-border electricity trade, its effectiveness was constrained by transmission bottlenecks and national protectionist policies (ECREEE, 2025). This institutional fragmentation, characteristic

of what Auty (1993) describes as weak resource governance structures, prevented the region from mounting a coordinated response to the energy crisis.

Looking forward, the Iran-Israel conflict has underscored the urgent need for ECOWAS to address its energy vulnerabilities. As Geels (2019) argues in his work on energy transitions, crises can create windows of opportunity for systemic change. In West Africa, this may involve accelerating renewable energy deployment to reduce import dependence, while simultaneously addressing the governance challenges that have hindered effective utilization of domestic energy resources. The experience of the 2025 crisis suggests that without such reforms, ECOWAS states will remain dangerously exposed to future global energy shocks.

Conclusion

The 2025 Iran-Israel conflict served as a critical stress test for global energy systems, revealing both the persistent vulnerabilities and potential pathways for resilience in ECOWAS member states. This study demonstrates how geopolitical shocks in energy-producing regions create cascading effects that disproportionately impact developing economies, particularly those grappling with the paradox of resource wealth alongside energy insecurity. The conflict's aftermath presents West African nations with both an urgent challenge and a strategic opportunity to reimagine their energy futures.

The analysis reveals three fundamental insights about ECOWAS energy systems. First, the region's dependence on imported refined petroleum products creates critical vulnerabilities during global supply disruptions, as evidenced by the 25-40% increase in transportation costs during the crisis (IMF, 2025). Second, existing governance frameworks have failed to translate resource wealth into energy security, with Nigeria's simultaneous status as oil exporter and fuel importer exemplifying this paradox. Third, the crisis accelerated existing trends toward renewable energy adoption, though institutional and infrastructural barriers continue to constrain this transition.

Recommendations:

ECOWAS should prioritize investments in modular refinery capacity to reduce dependence on imported fuels, particularly in Nigeria and other oil-producing states. The African Development Bank's (2025) proposed regional refinery initiative provides a viable model for coordinated action. Simultaneously, member states should accelerate implementation of the Desert-to-Power initiative to harness the region's 10 GW solar potential.

The crisis underscores the need for stronger institutional frameworks to manage energy security. This paper recommends establishing an ECOWAS Energy Resilience Fund, capitalized through a small levy on hydrocarbon exports, to finance strategic storage facilities and critical infrastructure. This should be coupled with harmonization of energy policies across member states to facilitate the West African Power Pool's full implementation.

ECOWAS nations should leverage digital technologies and decentralized renewable systems to bypass traditional grid limitations. Pilot projects combining solar microgrids with blockchain-enabled payment systems in rural Ghana demonstrate the potential of this approach. Scaling such innovations requires creating enabling environments for private sector participation.

Building technical capacity through regional centers of excellence in energy engineering and policy will be crucial. We propose expanding the ECOWAS Regional Centre for Renewable Energy and Energy Efficiency's mandate to include crisis preparedness training and transition planning.

The Iran-Israel conflict has illuminated both the fragility and potential of West Africa's energy systems. By viewing the crisis as a catalyst rather than merely a disruption, ECOWAS nations can transform their energy sectors from vulnerabilities into engines of sustainable development.

The time for strategic action is now, before the next global shock tests the region's resilience anew.

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