

The impact of the conflict between the United States and Iran in 2026 on the energy security of the Republic of Poland

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Abstract— Conflicts between the United States and the Islamic Republic of Iran in the 21st century have significantly influenced the shaping of global energy and geopolitical security, with their consequences also being felt in Europe, including in the Republic of Poland. The Persian Gulf region, as one of the key areas for the extraction and transportation of energy resources, is of fundamental importance to the stability of global oil and natural gas markets. The escalation of tensions in this region—encompassing military actions, economic sanctions, and incidents disrupting the transport of raw materials—leads to rising energy prices and increased uncertainty in international markets. As a consequence, European states, including the European Union, are compelled to undertake measures aimed at mitigating the risks arising from instability in regions strategic for energy supply. These measures primarily include the diversification of energy sources, the development of energy infrastructure, and the strengthening of international cooperation in the field of security. US–Iran tensions also have a geopolitical dimension, influencing the global balance of power and the functioning of the international security system, including structures such as NATO. These developments demonstrate that national energy security is not merely an economic issue but constitutes an integral component of broadly understood national and international security. In the context of the Republic of Poland, this necessitates the implementation of an active energy policy and the maintenance of stable relations within the international security system, in order to minimize the effects of potential crises in regions of critical importance for global energy supplies.

Keywords— energy security, geopolitics, fuel prices, national security

I. INTRODUCTION

Direct tensions between the United States of America and the Islamic Republic of Iran, which in the 21st century take forms ranging from political pressure and economic sanctions to military and cyber activities, constitute a significant element of

contemporary international relations. Their origins should be sought both in historical events and in the differing strategic interests of the two states, which have competed for influence in the Middle East region for decades. Particular importance is attached to events such as the Islamic Revolution in Iran in 1979, as well as subsequent proxy conflicts and the growing tensions associated with Iran's nuclear program. In the 21st century, relations between the United States and Iran have further deteriorated, which has been reflected, among other things, in the imposition of economic sanctions, the withdrawal of the United States from the nuclear agreement, and numerous military incidents in the Persian Gulf region (M. Axworthy, 2007, pp. 279). This region, due to its strategic importance for the global energy resources market, plays a crucial role in ensuring the stability of energy supply. Any disruptions in this area, resulting from the escalation of tensions, may lead to serious consequences for the global economy, including increases in commodity prices and the destabilization of international markets (D. Piękoś, K. Czyrny, 2026, pp. 145-147).

Tensions between the United States and Iran also have a geopolitical dimension, influencing the balance of power not only in the Middle East but also on a global scale. Other states and international organizations are indirectly involved in this conflict, which further complicates the situation and increases the risk of escalation (R. Fiedler, 2013, pp. 109-124).

In the context of contemporary international crises, these tensions constitute a significant destabilizing factor for international security. The aim of this article is to analyze the impact of the conflict between the United States and Iran on the energy and geopolitical security of the Republic of Poland, with particular emphasis on its consequences for the stability of energy supplies and the functioning of the international security system, including the structures of the North Atlantic Treaty Organization. Based on the adopted objective of the study, the

following research problem has been formulated: “Does the conflict between the United States and Iran affect the energy and geopolitical security of the Republic of Poland in the context of contemporary international conditions?” On the basis of the defined objective and the formulated research problem, the following research hypothesis has been adopted: the conflict between the United States and Iran exerts an influence on the energy and geopolitical security of the Republic of Poland, leading to increased uncertainty in energy commodity markets and affecting the stability of the international security system. The article is based on a review of the relevant literature, scientific publications, and available online sources. The research process employed the following methods, techniques, and tools: literature review, statistical data analysis, inductive and deductive reasoning, as well as the empirical method of desk research.

II. THE NATURE AND SIGNIFICANCE OF THE UNITED STATES-IRAN TENSIONS IN THE 21ST CENTURY

Relations between the United States and the Islamic Republic of Iran are complex in nature and stem from long-standing historical, political, and ideological determinants. During the Cold War, Iran, under the rule of Shah Mohammad Reza Pahlavi, remained one of the most important allies of the United States in the Middle East region (T. Coville, 2009, pp. 25-27). This cooperation encompassed both the military and economic spheres, and its primary objective was to limit the influence of the Soviet Union in the region and to ensure the stability of energy resource supplies (F. Halliday, 2005, pp. 120-135).

A turning point in bilateral relations was the Islamic Revolution of 1979, which led to the overthrow of the monarchy and the establishment of the Islamic Republic under the leadership of Ayatollah Ruhollah Khomeini (T. Coville, 2009, pp. 25-27). This event initiated a fundamental shift in Iran's foreign policy, resulting in the severance of diplomatic relations with the United States and the adoption of a distinctly anti-Western political orientation (M. Axworthy, 2007, p. 279). A particularly significant event during this period was the seizure of the US Embassy in Tehran and the detention of diplomatic personnel as hostages, which led to a profound crisis in relations between the two states. (G. Sick, 1985). In subsequent decades, tensions between the United States and Iran remained at a high level, and their nature was shaped by conflicting strategic interests and a lack of mutual trust. The United States repeatedly accused Iran of supporting organizations designated as terrorist and of developing a nuclear program with potential military applications. Conversely, the Iranian authorities perceived US actions as interference in the country's internal affairs and as a threat to its sovereignty and security (N.R. Keddie, 2007, p. 318). Contemporary tensions between the United States and the Islamic Republic of Iran primarily stem from overlapping political, military, and economic factors that shape the mutual perception of threats by both states. One of the key sources of conflict remains Iran's nuclear program, which, according to

the US authorities, may lead to Iran acquiring the capability to produce nuclear weapons. Despite Iran's declarations regarding the peaceful nature of its program, its development is perceived by the United States as a threat to both regional and global security (E. Abrahamian, 2011, p. 248).

The escalation of tensions is also driven by economic sanctions imposed on Iran by the United States. Their primary objective is to limit the country's economic capabilities, including its ability to finance military programs and activities of a destabilizing nature in the region. These sanctions are of particular importance in the energy sector, which constitutes the foundation of the Iranian economy, thereby further intensifying relations between the two states (R. Nephew, 2018). A significant source of tension between the United States and the Islamic Republic of Iran remains the competition for influence in the Middle East region. In its pursuit of strengthening its regional position, Iran supports various non-state actors, including organizations and groups operating, among others, in Iraq, Syria, and Lebanon. These actions are perceived by the United States as a destabilizing factor in the region and as a threat to its allies, including Israel and the states of the Persian Gulf. These relations are not solely bilateral in nature but are embedded in the broader context of competition for influence in the region, involving both regional actors and global powers. As a result, this conflict affects the shaping of the regional security system and influences the dynamics of international relations on a global scale (F.G. Gause, 2010).

The United States, supported by its allies, including Israel and the Persian Gulf states, seeks to maintain the existing balance of power based on its military and political presence. Iran, in turn, undertakes actions aimed at increasing its strategic autonomy and expanding its influence in the region. The contemporary balance of power in the Middle East is also shaped by the involvement of other international actors, such as Russia and China, which perceive tensions between the United States and Iran as an opportunity to strengthen their own geopolitical positions. Their presence influences the regional balance of power and limits the capacity of the United States to act unilaterally (R. Allison, 2013). Such actions increase the risk of direct armed confrontation and negatively affect the level of international security, particularly in the context of protecting strategic routes for the transportation of energy resources. Consequently, the escalation of tensions has led to a series of direct military actions, including operations conducted by the United States and Israel targeting objectives related to Iran's military and strategic capabilities. These tensions have also contributed to the deaths of key figures within the structures of the Islamic Republic of Iran, including the Supreme Leader Ali Khamenei, which has further intensified relations between the parties to the conflict. The Strait of Hormuz holds particular strategic importance, as it is one of the most significant routes for the transport of energy resources in the world. A substantial portion of global oil supplies is transported through this narrow maritime passage, which means that any disruptions to its operation may lead to serious consequences for the stability of energy markets and the security of supply (International Energy Agency, 2023, pp.45-

50). At the same time, the growing destabilization in the Persian Gulf region, as well as disruptions to the functioning of the Strait of Hormuz, have led to disturbances in the operation of this key transportation chokepoint. Incidents involving naval units, including attacks on tankers and temporary restrictions on freedom of navigation, have significantly increased the level of uncertainty in energy markets. These situations have highlighted the global importance of the Strait of Hormuz as a critical element of energy resource transportation infrastructure and have underscored its key role in ensuring the energy security of states. Consequently, the region remains an area of particular interest both for countries importing energy resources and for global powers seeking to maintain the stability and security of strategic transportation routes.

III. GEOPOLITICAL AND ENERGY CONSEQUENCES OF US–IRAN TENSIONS

Political and military tensions between the United States and the Islamic Republic of Iran exert a significant influence on the functioning of the global energy commodities market, affecting both price levels and the stability of oil supply. This is due to the fact that the Middle East region, particularly the Persian Gulf area, constitutes one of the key centers for the extraction and export of energy resources, while simultaneously remaining an area of high geopolitical instability. The importance of this region stems not only from the scale of its proven energy reserves, but also from its role as a primary transportation hub through which a substantial portion of global oil supplies flows (D. Yergin, 2008). A key role in this system is played by the Strait of Hormuz, located between Iran and the Arabian Peninsula, connecting the Persian Gulf with the Gulf of Oman and further with the Indian Ocean. It constitutes one of the most significant chokepoints in global energy resource transportation. A substantial portion of global oil supplies and liquefied natural gas is transported through the Strait of Hormuz, which makes it a crucial element of energy infrastructure of global importance. This route is primarily used by the states of the Persian Gulf region, such as Saudi Arabia, Iraq, Kuwait, Qatar, and the United Arab Emirates, which export energy resources to global markets, particularly to Europe and Asia. At the same time, the recipients of these resources include the world's largest economies, including China, India, Japan, and the countries of the European Union (K. Kaczmarek, E. Włodyka, 2022, pp. 211–212). Accordingly, any disruptions to the functioning of the Strait of Hormuz, resulting from political tensions or military incidents, may lead to significant disturbances in global energy supply chains. Even short-term restrictions on the flow of resources through this route result in increases in prices on international markets and heightened uncertainty among market participants. Under conditions of strong interdependence of energy markets, the destabilization of this key transportation chokepoint translates into global-scale reactions, affecting price levels, resource availability, and the strategic decisions of states and energy companies.

A consequence of the strained relations between the United States and Iran is the conflict that began on 28 February 2026. These developments involved military operations conducted by the United States with the support of Israel, as well as retaliatory actions by Iran targeting strategic objectives and states of the Persian Gulf region. An analysis of maritime traffic through the Strait of Hormuz indicates a sharp decline in transit intensity following the outbreak of hostilities on 28 February 2026. Prior to the escalation of the conflict, an average of 138 vessels per day transited the strait, confirming its role as one of the most significant global maritime routes. This volume included not only tankers transporting oil and gas, but also cargo ships, chemical tankers, container vessels, and other units involved in servicing the maritime trade of the Persian Gulf states. Such a high level of traffic implies that any sustained reduction in the strait's throughput has not only regional but also systemic implications for the global economy (M. Zafra, 2026).

The collapse of traffic through the strait following the onset of hostilities should be interpreted as the result of a combination of military, economic, and psychological factors. The drastic decline in transit volume can be expressed, in percentage terms, as a reduction of approximately 93–95% compared to pre-conflict levels. In the first half of March, daily traffic in the Strait of Hormuz dropped to nearly zero, with only a limited number of vessels belonging to Iran's principal allies managing to safely exit the high-risk area of the Persian Gulf. Significant confirmation of the persistence of this restriction is provided by data from 27 March 2026, according to which a total of 63 transits of all vessel types were recorded over the preceding seven days, corresponding to an average of approximately 9 vessels per day. The structure of this traffic included various classes of vessels, such as crude oil tankers, carriers, bulk carriers, and container ships (SeaVantage, 2026). When a two-week ceasefire was announced on 8 April 2026, episodic increases in vessel traffic were observed, reaching approximately 15 units per day. This confirms that even a partial restoration of transit still represented a decline exceeding 85–90% compared to standard throughput levels (Reuters, 2026).

From the perspective of analyzing the dynamics of change, the pace of the collapse in traffic is particularly significant. The decline from 138 vessels per day to single-digit values indicates a transition from full operational capacity to the effective dysfunction of the route within a very short period. Such a shift demonstrates the high sensitivity of global transportation routes to geopolitical factors and confirms that chokepoint infrastructure responds in a nonlinear manner, where escalation of tensions may lead to disproportionately large disruptions in flow. From a statistical standpoint, considerable variability in daily transit values can also be observed, indicating a lack of operational stability along the route. Differences between approximately 9 vessels per day and episodic increases to 15 units represent fluctuations of up to 60–70% over short periods, further complicating logistical planning and increasing operational risk for market participants (Windward, 2026).

From an economic perspective, a reduction in transit volume exceeding 90% should be interpreted as a profound disruption

to the balance of supply and demand within the global maritime transport system. The limitation of capacity along one of the key routes generates a domino effect, leading to the accumulation of delays, an increase in freight costs, and heightened pressure on alternative transportation routes. Consequently, even a partial disruption of traffic in the Strait of Hormuz produces effects that extend far beyond the Middle East region. A particularly significant aspect is the sharp decline in the number of crude oil tanker transits immediately following the outbreak of the conflict. The average number of crude oil tanker passages dropped from approximately 24 per day to merely 1–2 per day as early as 1 March 2026 (Reuters, 2026). This represents a reduction of more than four-fifths within a very short period.

Such a collapse should be interpreted as an indicator of the extreme sensitivity of maritime oil transportation to geopolitical tensions, especially when the disruption affects a chokepoint route critical for the supply of energy resources. From the beginning of the war on 28 February until mid-April, only a limited number of oil tankers managed to transit the strait, transporting crude oil to destinations including Malaysia, China, India, Pakistan, and Thailand. In practice, this means that the system was not completely halted but operated far below normal capacity, with access to the route dependent on current political conditions, navigational safety, and arrangements between the involved parties. This situation increased the asymmetry of risk among oil-importing states and reinforced the importance of political relations in maintaining access to supply routes. At the economic level, the decline in oil tanker traffic through the Strait of Hormuz led to a disruption of the supply balance in the physical market. According to data from 13 April, approximately 187 tankers carrying 172 million

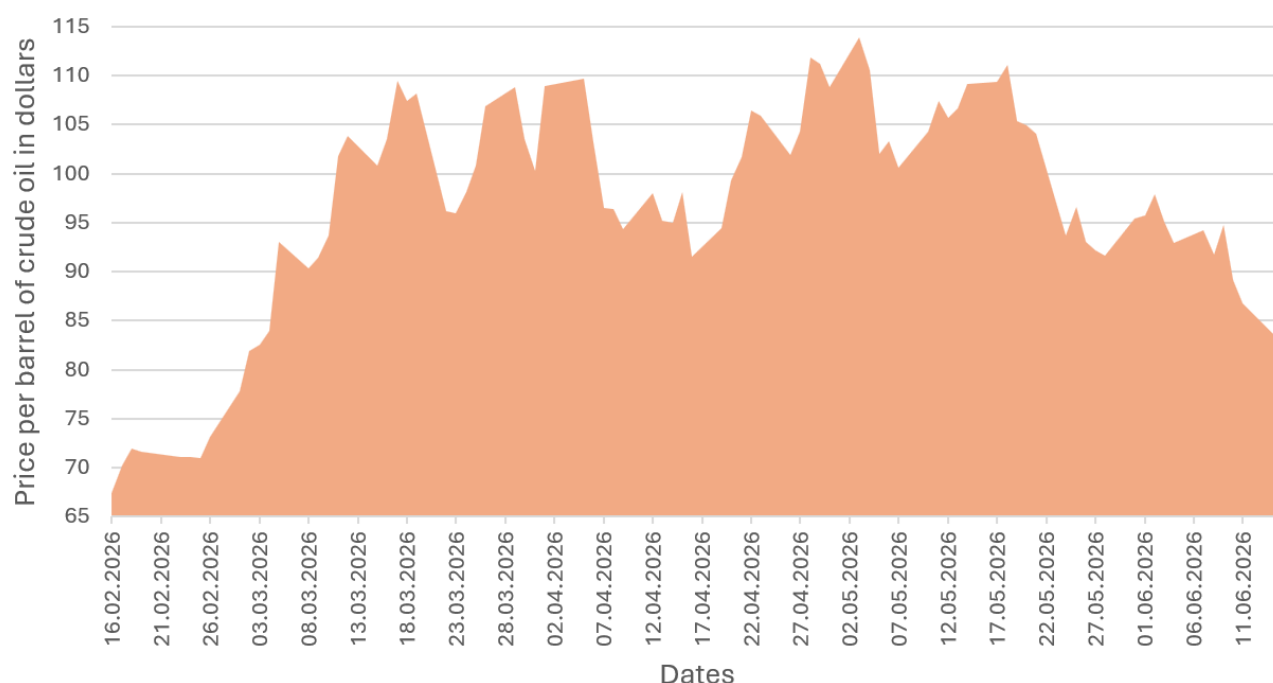
barrels of oil remained stranded in the region (Reuters, 2026).

The war and disruptions in the Strait of Hormuz resulted in the largest disruption of global oil and gas supplies in history, with analysts estimating that the conflict could reverse earlier projections of a supply surplus and push the market into a deficit. In the second quarter of 2026, a deficit of approximately 3 million barrels per day was expected, while the average annual supply loss was estimated at around 2.13 million barrels per day (Reuters, 2026). Thus, the increase in physical supply constraints, combined with impediments to tanker transit, affected not only logistics but also the global market balance and the price formation process.

IV. THE IMPACT OF USA–IRAN TENSIONS ON THE ENERGY AND GEOPOLITICAL SECURITY OF THE REPUBLIC OF POLAND

Tensions between the United States and the Islamic Republic of Iran exert a direct influence on the level of oil prices on global markets, which also translates into the energy situation of countries importing energy resources, including the Republic of Poland. The oil market is characterized by a high sensitivity to geopolitical factors, particularly when disruptions affect regions of key importance for global supply. At the moment of escalation of the conflict in the Persian Gulf region, a noticeable increase in oil prices was observed on international markets. In percentage terms, these changes were abrupt and short-term in nature, resulting from the incorporation by market participants of the so-called geopolitical risk premium. This means that oil prices reflected not only the actual decline in supply, but also expectations regarding potential future disruptions in deliveries.

CHART 1. THE DYNAMICS OF CRUDE OIL PRICE CHANGES OVER TIME UNDER CONDITIONS OF THE US–IRAN CONFLICT



Source: Own elaboration based on data from: <https://www.money.pl/gielda/surowce/dane,ropa.html> (accessed on 11 June 2026).

In the period immediately preceding the escalation of the conflict, i.e., until 26 February 2026, oil prices remained at a relatively stable level. In the analyzed interval from 16 to 26 February, the price of oil fluctuated between USD 67.39 and USD 73.16 per barrel, with an average level of approximately USD 70.93. This indicates that prior to the emergence of the geopolitical factor, the market remained in a state of relative equilibrium, without clear signs of significant price pressure.

A turning point occurred at the turn of February and March 2026, coinciding with the onset of the conflict's escalation. As early as 1 March, the price of oil increased to USD 77.79 per barrel and subsequently continued to rise, reaching USD 84.01 on 4 March. Compared to the level of 26 February, this represented an increase of approximately 14.8% within a few days. Such a rapid market response indicates the emergence of a risk premium associated with potential disruptions in supply and increased uncertainty regarding the stability of transportation routes. The most dynamic phase of growth occurred in the first half of March. On 5 March, the price of oil reached USD 93.04, while on 12 March it rose to USD 103.85 per barrel. In relation to the price of 26 February, this represented an increase of approximately 42%. In the following days, upward pressure persisted, as confirmed by the price reaching USD 109.47 on 17 March. Thus, the price of oil was nearly 50% higher than immediately before the escalation of the conflict. It can therefore be concluded that the market reacted not only to potential actual supply constraints, but also to investors' expectations and concerns regarding further geopolitical developments.

In the second half of March, a phase of increased volatility became apparent. After reaching a local peak in mid-March, prices periodically fell below the USD 100 mark, reaching USD 96.18 on 22 March and USD 95.91 on 23 March. However, this did not indicate a return to pre-conflict levels. Prices remained significantly higher than in February, and their fluctuations within the range of approximately USD 96–109 per barrel indicated the persistence of market uncertainty. A characteristic feature of this period was the alternating occurrence of downward corrections and renewed increases, reflecting the market's high sensitivity to incoming information.

At the turn of March and April, a partial price correction occurred; however, it did not prove to be sustained. On 31 March, the price of oil stood at USD 100.32, after which it increased again to USD 108.92 on 1 April and reached USD 109.72 per barrel on 5 April. Subsequently, a decline was observed to USD 94.33 on 9 April and USD 91.57 on 16 April. Despite this correction, price levels remained significantly higher than those recorded prior to the escalation of the conflict. The price as of 16 April was approximately 25% higher than that recorded on 26 February, indicating that the market had not returned to its pre-crisis equilibrium. Another upward phase emerged in the second half of April and at the beginning of May. From 19 April onward, prices began to rise again, reaching USD 99.27 on 20 April, USD 106.44 on 22 April, and USD 111.82 on 28 April. The highest level in the entire analyzed period was recorded on 3 May, when the price of oil reached USD 113.88 per barrel. In relation to the price on 26

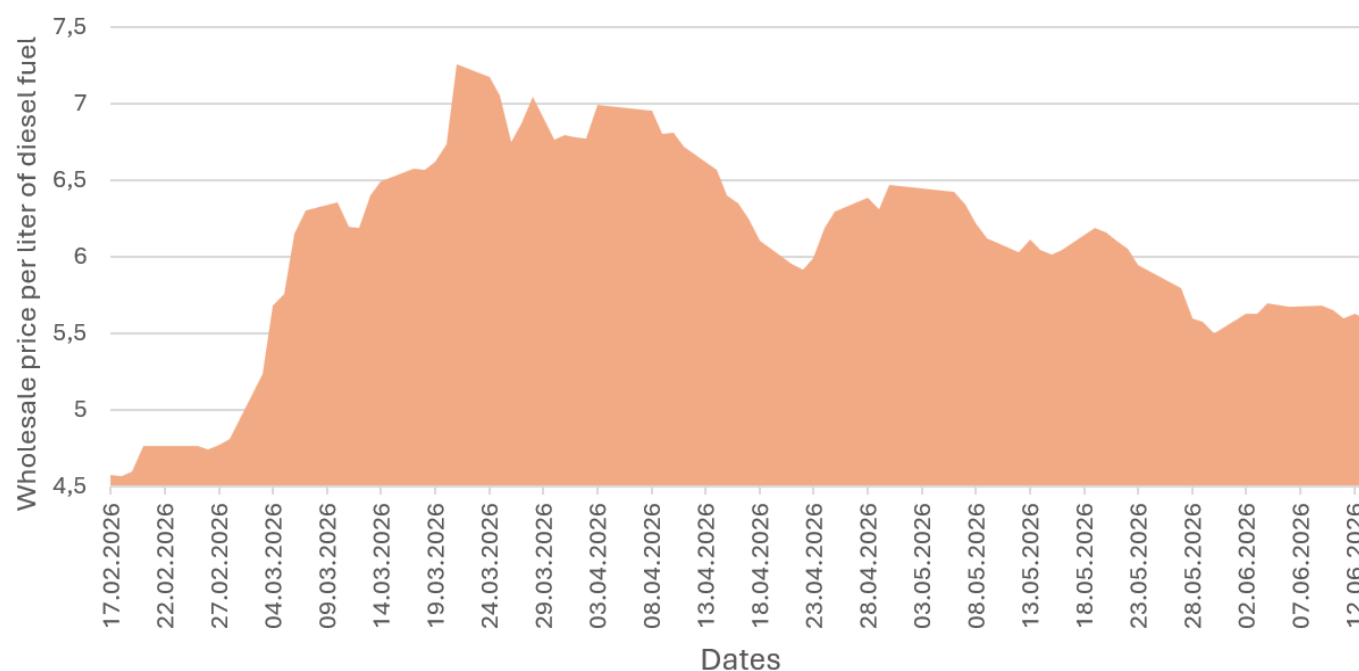
February, this represented an increase of approximately 55.7%. This was the peak of the analyzed series and at the same time confirmed that the effects of the conflict escalation were not limited to a short-term market reaction in the first half of March. In May, oil prices remained at a relatively high level for a certain period, most often exceeding USD 100 per barrel. Between 10 and 21 May, prices fluctuated mainly within the range of approximately USD 104 to USD 111, indicating the consolidation of an elevated price level. It was not until the end of May that a more pronounced easing of upward pressure occurred. On 24 May, the price fell to USD 93.65, and in the following days it remained within the range of approximately USD 91–97. This indicates a transition of the market into a correction phase, although still at levels higher than those observed prior to the escalation of the conflict. In June, a continuation of the downward trend was observed. After a temporary increase to USD 97.91 on 2 June, prices began to decline steadily, reaching USD 89.15 on 10 June, USD 86.74 on 11 June, and USD 83.22 on 15 June. Compared to the peak on 3 May, this represented a decrease of approximately 26.9%. Nevertheless, the price recorded on 15 June remained approximately 13.8% higher than the level observed on 26 February. This indicates that although the market partially corrected the earlier sharp increase, it did not fully return to pre-escalation levels.

From the perspective of the European economy, increases in energy commodity prices directly translate into higher import costs and affect the functioning of the fuel market. Poland, as a country significantly dependent on crude oil imports, remains particularly sensitive to such changes (D. Piękoś, P. Suduł, S. Augustyn, 2023, pp. 18–19). Rising global oil prices lead to increased procurement costs for domestic energy companies, which are subsequently reflected in fuel prices on the national market.

The analysis of fuel price changes in Poland in the period from the second half of February to mid-June 2026, conducted on the basis of wholesale prices published by Poland's largest fuel company, Orlen, indicates a clear relationship between the dynamics of domestic prices and the escalation of geopolitical tensions in the Persian Gulf region. Empirical data confirm that the domestic fuel market responded to changes in crude oil prices on international markets; however, this response was gradual and distributed over time. In the period preceding the escalation of the conflict, i.e., from 17 to 28 February 2026, fuel prices in Poland remained at a relatively stable level. During the analyzed timeframe, prices ranged from PLN 4.569 per liter to PLN 4.809 per liter, with an average level of approximately PLN 4.714 per liter. For instance, on 17 February the price was PLN 4.577 per liter, while on 28 February it reached PLN 4.809 per liter. This represented an increase of approximately 5.1%, which can be considered moderate in comparison with the changes observed in the subsequent weeks. Such a price level indicates a relative equilibrium of the domestic market and the absence of significant upward impulses prior to the escalation of geopolitical tensions. A turning point occurred at the turn of February and March 2026. As early as 3 March, the price increased to PLN 5.237 per liter, and on 4 March it reached PLN

5.681 per liter.

CHART 2. THE DYNAMICS OF CHANGES IN WHOLESALE FUEL PRICES AT ORLEN UNDER CONDITIONS OF THE US–IRAN CONFLICT



Source: Own elaboration based on data from: <https://www.orlen.pl/> (accessed on 12 June 2026)

On 5 March, the price amounted to PLN 5.760 per liter, which represented an increase of approximately 19.8% compared to the level recorded on 28 February. This rise should be interpreted as the first stage of the transmission of the price impulse from the crude oil market to the domestic fuel market. In the following days, the upward trend continued—on 6 March the price reached PLN 6.150 per liter, and on 7 March PLN 6.300 per liter. This meant that within just a few days, the wholesale fuel price increased by approximately 31% compared to the level prior to the escalation of the conflict.

On 10 March, the price stood at PLN 6.359 per liter, and on 13 March it reached PLN 6.399 per liter. In the subsequent days, price increases continued, reaching PLN 6.577 per liter on 17 March, PLN 6.737 per liter on 20 March, and PLN 7.258 per liter on 21 March. This was the highest level in the entire period analyzed. Compared to the price on 28 February, this represented an increase of approximately 50.9%. Such a significant scale of increase confirms the substantial influence of external factors on the domestic fuel market. It can be assumed that this rise resulted from the accumulation of several effects: the increase in crude oil prices, an elevated geopolitical risk premium, possible exchange rate fluctuations, and adjustments of margins and operational costs in the wholesale market. After reaching its peak in the second half of March, the market entered a phase of high volatility. On 24 March, the price remained very high at PLN 7.171 per liter, after which it declined to PLN 6.749 per liter on 26 March, representing a decrease of approximately 5.9% within two days. In the following days, prices rose again, reaching PLN 7.041 per liter on 28 March, and subsequently stabilized within the range of

approximately PLN 6.7–7.0 per liter. Such fluctuations indicate market instability and a high sensitivity of fuel prices to ongoing information regarding the geopolitical situation and raw material prices on global markets.

At the beginning of April 2026, fuel prices remained at a level significantly higher than before the escalation of the conflict. On 1 April, the price stood at PLN 6.782 per liter; on 3 April, it increased to PLN 6.988 per liter; and on 8 April, it amounted to PLN 6.950 per liter. Subsequently, a gradual downward correction became visible. The price declined to PLN 6.565 per liter on 14 April, PLN 6.346 per liter on 16 April, and PLN 6.104 per liter on 18 April. Despite this decrease, price levels remained clearly higher than those observed prior to the escalation of tensions. The price recorded on 18 April was approximately 26.9% higher than that of 28 February, indicating that the market had not yet returned to its pre-conflict equilibrium level. In the second half of April, a further decline in prices could be observed, followed by a short-term rebound. On 21 April, the price dropped to PLN 5.953 per liter, and on 22 April to PLN 5.916 per liter. These were the lowest levels since the beginning of March; however, they still remained more than 20% higher than the pre-escalation level. In the following days, a rebound occurred: the price increased to PLN 6.187 per liter on 24 April, PLN 6.296 per liter on 25 April, and PLN 6.470 per liter on 30 April. At the beginning of May, the price remained at a similar level, reaching PLN 6.465 per liter on 1 May. This represented an increase of approximately 34.4% compared to the price on 28 February. This phase indicates that, despite the earlier correction, the market remained susceptible to renewed upward impulses.

In May 2026, fuel prices began to gradually decline, although this process was irregular. Between 6 and 16 May, prices fluctuated within the range of approximately PLN 6.018 to PLN 6.426 per liter. Subsequently, in the second half of May, a more pronounced downward trend became visible. The price stood at PLN 6.187 per liter on 19 May, PLN 6.051 per liter on 22 May, and PLN 5.950 per liter on 23 May. Toward the end of May, the decline accelerated: on 27 May the price was PLN 5.793 per liter, on 28 May PLN 5.599 per liter, and on 30 May PLN 5.500 per liter. This represented the lowest level since the beginning of March, yet still approximately 14.4% higher than the price recorded on 28 February.

In the first half of June 2026, fuel prices stabilized at a lower level than in March and April, although they did not return to pre-escalation values. Between 2 and 13 June, prices ranged from PLN 5.597 to PLN 5.698 per liter. The final observation, dated 13 June, indicates a price of PLN 5.597 per liter, which is approximately 16.4% higher than the level recorded on 28 February. This demonstrates that, despite a clear correction from the March peak, the domestic fuel market continued to be affected by the earlier increase in oil prices and the elevated geopolitical risk.

The escalation of tensions between the United States and the Islamic Republic of Iran exerts a significant impact not only on energy security but also on the functioning and cohesion of the North Atlantic Alliance. NATO, as an organization founded on the principle of collective defense, faces challenges arising from the need to develop a common position toward regional conflicts that nonetheless generate global consequences. In the context of this conflict, a clear asymmetry of interests between the United States and European NATO members is evident. While for the United States the Middle East represents a region of direct strategic engagement, for many European countries the conflict is indirect in nature and is perceived primarily through the lens of energy security and economic stability. These differences influence both the willingness to undertake military action and the scope of support provided to an ally. In practice, this leads to a situation in which some European states demonstrate limited readiness to engage directly in military operations outside NATO's treaty area. This is determined by both political and economic considerations, including concerns over the consequences of conflict escalation, such as rising energy prices, market destabilization, and threats to internal security. From the perspective of NATO's functioning, this means that regional conflicts may reveal existing strategic divergences among alliance members. The lack of unanimity regarding responses to a crisis weakens the ability to act swiftly and in a coordinated manner, which in the long term may affect perceptions of the Alliance's credibility as a security guarantor. At the same time, it should be emphasized that this situation does not imply a formal breakdown of allied solidarity, but rather points to its selective character in relation to conflicts that extend beyond a direct threat to the territory of member states. In practice, this means that support for US actions may take various forms, ranging from political backing to limited logistical involvement, without the necessity of direct military participation.

Consequently, US–Iran tensions highlight significant challenges faced by NATO, related to the need to reconcile global and regional interests and to maintain alliance cohesion under conditions of diverse strategic priorities among its members. This phenomenon is of direct importance to countries such as the Republic of Poland, which base their security on the credibility of collective defense mechanisms.

V. CONCLUSION

The escalation of the US–Iran conflict led to significant disruptions in the global energy supply system. This was particularly evident in the case of the Strait of Hormuz, whose destabilization resulted in a sharp decline in vessel traffic and an increase in uncertainty on international markets. As a consequence, oil prices rose by more than 40% over a short period, confirming the strong relationship between geopolitical tensions and the level of energy commodity prices.

The increase in oil prices was also reflected in the domestic market. Empirical data analysis has shown that fuel prices in Poland rose by over 50% during the peak phase of the conflict, with the price transmission mechanism exhibiting both delayed and nonlinear characteristics. A key role in this process was played by Orlen, whose wholesale price levels had a direct impact on the formation of fuel prices for consumers. The rise in global crude oil prices translated into higher fuel procurement costs, which in turn affected the functioning of the entire economy. From the perspective of international security, US–Iran tensions also revealed significant challenges facing the North Atlantic Alliance. Differences in interests between the United States and European NATO members contributed to the limited willingness of some countries to engage directly in the conflict. Although this situation did not lead to a formal breakdown of allied solidarity, it highlighted the selective nature of support and the diversity of strategic priorities within the alliance.

The research hypothesis stating that the conflict between the United States and Iran affects the energy and geopolitical security of the Republic of Poland, leading to increased uncertainty in energy commodity markets and influencing the stability of the international security system, has been confirmed in this study. This conflict has contributed to an increase in energy commodity prices, disruptions in transportation, and a rise in uncertainty on international markets.

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