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Economic, legal, and geopolitical implications of the second war between Iran, Israel, and the United States: interpretations and scenarios based on multilayer theory in 2026

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Abstract

The military conflict that began on February 28, 2026, with coordinated attacks by the United States and Israel on nuclear and infrastructure facilities on Iranian territory quickly escalated, within a matter of days, into a systemic crisis of unprecedented proportions that led to the closure of the Strait of Hormuz. Therefore, this article aims to examine, from an integrative analytical perspective, the main economic, legal, and geopolitical repercussions of the armed conflict between Iran, Israel, and the United States in 2026. Methodologically, the research

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is conducted within the hermeneutic tradition of Gadamer and critical geopolitics, tools combined in what is known as geopolitical hermeneutics. The results show that the closure of the strait produced a cascading systemic shock on energy markets, supply chains, and global food security, while also revealing a serious crisis in the effectiveness of international law. It is concluded that what this conflict has brought to light is not simply the possible transition toward a multipolar order, but the specific conditions under which that multipolarity is taking shape: fragmented, asymmetrical, and lacking an actor with the political will and sufficient legitimacy to uphold common rules.

Keywords: international law, multilayered theory, critical geopolitics, times of war, scenarios and perspectives.

Repercusiones económicas, jurídicas y geopolíticas de la segunda guerra entre Irán, Israel y Estados Unidos: interpretaciones y escenarios desde la teoría multicapas en 2026

Resumen

El acontecimiento bélico que comenzó el 28 de febrero de 2026 con ataques coordinados de Estados Unidos e Israel, sobre instalaciones nucleares y de infraestructura en territorio iraní se transformó, en cuestión de días, en una crisis sistémica de proporciones inéditas que trajo consigo el cierre del Estrecho de Ormuz. Por lo tanto, este artículo se propone examinar, desde una perspectiva analítica integradora, las principales repercusiones económicas, jurídicas y geopolíticas del conflicto armado entre Irán, Israel y Estados Unidos en 2026. Metodológicamente, la investigación se desarrolla en la tradición hermenéutica de Gadamer y de la geopolítica crítica, herramientas combinadas en lo que se denomina hermenéutica geopolítica. Los resultados muestran que el cierre del estrecho produjo un shock sistémico en cascada sobre los mercados energéticos, las cadenas de suministro y la seguridad alimentaria global, al tiempo que evidenció una grave crisis de efectividad del derecho internacional. Se concluye que lo que este conflicto ha puesto en evidencia, no es simplemente la posible transición hacia un orden multipolar, sino las condiciones concretas, en las que esa multipolaridad está cristalizando: fragmentada, asimétrica y sin un actor con la voluntad política y la legitimidad suficiente para sostener reglas comunes.

Palabras clave: derecho internacional; teoría multicapas; geopolítica crítica; tiempos de guerra; escenarios y perspectivas.

Introduction

The world is witnessing in 2026 one of the most serious geopolitical disruptions of recent decades: the armed conflict between the United States, Israel, and Iran, whose strategic epicenter has shifted toward the Strait of Hormuz — a maritime corridor of barely twenty-one nautical miles connecting the Persian Gulf with the Gulf of Oman, which, under normal conditions, channels approximately twenty percent of the crude oil and liquefied natural gas traded globally (United Nations Conference on Trade and Development, 2026).

What began on February 28, 2026, with coordinated attacks by the United States and Israel on nuclear and infrastructure facilities in Iranian territory transformed, within days, into a systemic crisis of unprecedented proportions. In this context, Iran responded by declaring the strait closed to commercial traffic, and the daily number of vessels in transit fell from approximately 129 in February to barely six in March — a ninety-five percent reduction that, as reported by Gulf News (2026), the United Nations Conference on Trade and Development (UNCTAD) characterized as a de facto closure of the corridor.

This scenario calls into question not only global energy supply chains, but also the architecture of international maritime governance; for under the United Nations Convention on the Law of the Sea (United Nations, 1982), straits used for international navigation are subject to the transit passage regime — a principle that Iran, a State not party to that instrument, has challenged through a combination of drones, naval mines, and selective attacks on neutral vessels, eroding the distinction between mare liberum and sovereign control that has structured maritime law since Hugo Grotius.

For the authors of this research article, what is at stake is not merely freedom of navigation at one point on the map, but the capacity of the international order to collectively manage what are known as "geopolitical chokepoints" — those physical nodes of the world-economy whose obstruction transforms regional conflicts into global systemic shocks, with calamitous consequences for the world at large.

Following the analytical logic of Wang et al. (2024), in situations such as this one, beyond the operative and energy dimension, the Iran-Israel-United States conflict reveals an underlying ontological structural tension, expressed in the transition from a unipolar international order —sustained by North American hegemony since the end of the Cold War— toward a multipolar configuration in which the rules of power, legitimacy, and influence are being redefined without any actor having succeeded in imposing a coherent alternative narrative.

In the current historical moment, all indications are that alliances in this new environment are more transactional, deterrence mechanisms have become increasingly difficult to calibrate due to the multiplicity of threat vectors — military, economic, and cyber —and national security is no longer measured exclusively in aircraft carriers or armored divisions, but in control over supply chains, digital infrastructures, and technological capability.

This phenomenon connects with what recent academic research on multilevel governance has conceptualized as the fragmentation of institutional leadership (van Driel et al., 2022), such that the absence of an actor with sufficient political will and legitimacy to coordinate a multilateral response to the closure of the Strait exposes the fault lines of the United Nations collective security system,

whose Security Council remains paralyzed by the veto power of the permanent members.

For the theory of international relations, the episode is particularly revealing: while the structural realism of Waltz (1979) and the offensive realism of Mearsheimer (2001) make it possible to explain the balance-of-power logic underlying the conflict, the economic and legal dimensions of the crisis nevertheless exceed strictly neorealist frameworks and demand a multilayered reading that articulates geopolitical analysis, international political economy, and public international law.

In this regard, the research of Wang et al. (2024) has underscored that disruptions to maritime energy corridors produce far-reaching effects that no unidimensional paradigm can adequately capture, hence the need for hybrid theoretical and methodological models.

This article aims to examine, from an integrative analytical perspective, the main economic, legal, and geopolitical repercussions of the armed conflict between Iran, Israel, and the United States in 2026, with particular attention to the implications arising from the interruption of maritime traffic in the Strait of Hormuz. The approach does not claim to exhaust the complexity of the phenomenon in all its dimensions—a task that would exceed the scope of a scientific article—but rather to trace a rigorous interpretive reading, grounded in primary documentary sources and in the most recent developments in critical geopolitics, international political economy, and public international law.

To guide this research, three questions are posed as heuristic axes:

- From the perspective of political economy: in what ways does the sustained closure of the Strait of Hormuz reconfigure energy flows, global productive linkages, and the structures of asymmetric dependence between advanced economies and developing economies?
- From the perspective of international law: to what extent are the military actions of Israel and the United States against Iranian nuclear facilities, as well as Iran's naval blockade response, compatible with the jus cogens norms on the use of force enshrined in the Charter of the United Nations and with the transit passage regime provided for under the law of the sea?
- From the perspective of geopolitics: what scenarios of reconfiguration of the multipolar international order emerge from this conflict, considering the effects on existing alliances, the regional security architecture in the Middle East, and the redistribution of influence between conventional and emerging powers?

These three questions are not independent of one another; they constitute overlapping layers of a single complex phenomenon that can only be understood through an analytical approach that simultaneously articulates the different levels of analysis, as proposed by multilayer theory in the study of contemporary international conflicts.

With the aim of responding in an orderly manner to the stated objective and the questions that frame it, the article is organized into six sections. The first develops the theoretical foundations of the research, anchored in multilayer governance theory and critical geopolitical analysis—a tradition that, as Tuathail (1997) explains, understands space as a discursive and ideological construction rather than a neutral geographical variable—.

The second section explains the methodology adopted, which combines the hermeneutics of documentary sources—in the Gadamerian tradition of understanding and interpreting historically situated texts—with the postulates of critical geopolitics as a device for reading the discourses, interests, and narratives that structure the conflict.

The third section, which constitutes the argumentative core of the article, is in turn subdivided into three subsections that respond specifically to each of the guiding research questions: the first analyzes the repercussions on the global political economy; the second examines the tensions with international law; and the third traces the geopolitical scenarios derived from the conflict, exploring how the Strait of Hormuz crisis could accelerate or redefine the transition toward a fragmented, uncertain multipolar order without a consolidated hegemon.

Finally, the conclusions synthesize the main findings, set out their implications for global governance, and identify the interpretive limitations of the analysis, as well as the lines of future research that the conflict leaves open.

1. Theoretical foundations

1.1. Multilayer theory in contemporary geopolitical analysis

When Waltz (1959) published *Man, the State, and War*, he did something that few theorists of his generation had dared to do with systematic rigor: he called into question the vantage point from which phenomena of international politics are explained. Rather than assuming a single explanatory starting point, he proposed that the causes of war can be identified at three distinct planes or "images": individual human nature, the internal organization of states, and the anarchic structure of the international system.

What is theoretically productive in this framework is not the hierarchy that Waltz himself (1959; 1979) establishes —privileging the third image, the systemic one— but rather the underlying methodological warning: no single level, taken in isolation, offers a complete explanation of conflicts. Consequently, a thorough understanding of any international phenomenon requires the simultaneous articulation of all three planes. This epistemological intuition is precisely the seed of what, decades later, would come to be known as multilayer analysis.

From the perspective of the Iran-Israel-United States conflict in 2026, the Waltzian framework reveals its heuristic power: the individual decisions of political leaderships — first image—, the nature of the Iranian regime and the American electoral cycle —second image—, and the redistribution of capabilities within an emerging multipolar system — third image— are three irreducible dimensions that must be read in parallel in order to understand the escalation of the armed conflict in question (Waltz, 1979).

Along these lines, Tong (2024) has critically revisited the Waltzian analogy between states and economic firms to update the explanatory reach of structural realism in contexts of multipolar rivalry, confirming that the theoretical architecture of Waltz (1959) retains analytical relevance, although it demands significant revisions when confronted with the complexity of contemporary conflicts that transcend purely systemic logic.

1.2. David Singer: the micro-macro debate and the methodological decision of the level of analysis

If Waltz (1959) sketched the map of levels, it was Singer (1961) who transformed that cartography into an explicit epistemological problem for the discipline. In his foundational 1961 article, "The Level-of-Analysis Problem in

International Relations," Singer argued that the choice between the systemic level and the subsystemic level is not a simple matter of methodological convenience, but rather a decision that determines which kinds of phenomena become visible and which remain in the shadow.

Along this line of reasoning, the systemic level, he maintained, offers greater capacity for generalization and allows for the identification of structural patterns in the behavior of actors; the subsystemic or national-unit level, by contrast, provides the richness of detail, domestic incentives, and the heterogeneity of state responses.

The tension between the two admits no definitive resolution —Singer (1961) was candid on this point —and it is precisely this intellectual honesty that makes his theoretical framework a genuinely useful methodological point of departure. It acknowledges that the observer who chooses one level "gains" generality but "loses" detail, and vice versa— which amounts to accepting that every theory of international relations is, to some degree, a simplification committed to its own limitations.

In the research proposed here, this caveat carries direct consequences: analyzing the repercussions of the conflict in the Strait of Hormuz from the perspective of international political economy —systemic level— and from the perspective of the foreign policy decisions of each belligerent state —subsystemic level— are neither equivalent nor interchangeable operations. They are complementary hermeneutic readings whose deliberate articulation constitutes the very core of the multilayer approach.

Indeed, the review of the level-of-analysis problem by Resnick (1973) confirms that the geopolitical debate initiated by Singer (1961) remains one of the most productive axes of international relations theory, from that era to the present day in the twenty-first century.

1.3. Barry Buzan: the regional level as an intermediate layer and the theory of security complexes

Singer's (1961) two-level model and Waltz's (1959; 1979) triad faced an empirical problem that was difficult to sidestep: between the state and the global system there exists an intermediate scale —the region— in which a significant portion of contemporary conflicts are processed. In this context, it was Buzan et al. (1998) who theorized this intermediate layer most systematically through the Regional Security Complex Theory (RSCT).

According to this theory, a regional security complex is a set of states whose security concerns are so deeply interconnected that it is impossible to analyze the national security of each one independently of the others. Consequently, the dynamics of amity and enmity, regional balance of power, and the penetration of external powers shape the architecture of the complex (Buzan et al., *Security: A New Framework for Analysis*, 1998).

What makes this framework particularly powerful is its four-level analytical structure — domestic, regional, interregional, and global— whose levels do not exclude one another but rather overlap and interact, thereby configuring a genuinely multilayered topology of international security.

The Middle East, in the conceptualization of Buzan and Wæver (2009), is described as a "conflict formation" in which Iran and Israel represent the poles of

greatest rivalry within a complex where the penetration of external powers —the United States, Russia, and China— is structurally constitutive rather than merely circumstantial. An article published by Akbar et al. (2025) applies the RSCT to analyze the effects of the Saudi Arabia–Iran conflict on the broader region, demonstrating the continuing validity and operational relevance of the Buzanian framework for understanding the 2026 conflict.

Table 1. Comparison of the fundamental contributions of the three theoretical pillars of multilayer analysis in international relations.

Dimension	Kenneth N. Waltz	J. David Singer	Barry Buzan et al.
Main work.	(Waltz, 1959; 1979).	(Singer, 1961).	(Buzan et al., 1998).
Proposed levels.	Three images: the individual, the state, and the international system.	Two levels: the international system and national subsystems.	Four levels: domestic, regional, interregional, and global.
Privileged unit.	Systemic structure (international anarchy).	Micro-macro balance; no level is inherently superior.	The region as a constitutive intermediate unit.
Nature of the system.	Anarchic, self-help, distribution of capabilities.	Indeterminate; the choice of level defines the object of study.	Interdependent complex of security dynamics.
Central causal mechanism.	Balance of power and distribution of polarities.	Systemic incentives vs. subsystemic decisions.	Patterns of amity/enmity + penetration of external powers.
Methodological contribution.	The need to explain causes across multiple layers of reality.	No theory is complete with a single level of analysis.	The regional level is a necessary, not optional, condition.
Recognized limitation.	Undervalues the agency of units and domestic factors.	Does not resolve the trade-off between generality and detail.	Underestimates the agency of non-state actors and transnational forces.

Dimension	Kenneth N. Waltz	J. David Singer	Barry Buzan et al.
Applicability to the 2026 conflict.	Explains escalation as the result of power redistribution in a multipolar system.	Justifies the need to combine analysis of the domestic politics of each belligerent actor with the systemic pattern.	Enables understanding of the Middle East as a security complex in which external powers are constitutive of the conflict.

Methodological note: This table does not aim to establish a hierarchy among the three perspectives, but rather to highlight their complementary character. The multilayer analysis adopted here assumes that each approach contributes a distinct and irreplaceable angle of visibility: Waltz (1959; 1979) provides the underlying systemic structure; Singer (1961), the logic of methodological choice; and Buzan et al. (1998), the regional architecture that mediates global impulses. The articulation of these three levels constitutes the epistemological foundation of the analytical framework of the present research.

What Table 1 makes manifest is not a dispute between rival theories, but rather the cartography of a single complex reality observed from different angles. Waltz (1959; 1979), Singer (1961), and Buzan et al. (1998) do not contradict one another: they complement each other structurally, and that complementarity is precisely the strength of the multilayer approach when set against single-level paradigms.

Waltz (1959) establishes that systemic anarchy and the distribution of capabilities are the primary determinants of state behavior; Singer (1961) adds that this systemic structure never fully determines decisions, because national units retain margins of action that are only visible when the analysis descends to the subsystemic level; and Buzan et al. (1998) completes the picture by demonstrating the existence of a regional layer that neither the global system nor the individual state can capture on its own — a layer in which tactical alliances are forged, threat

identities are articulated, and the logic of securitization that renders geographically proximate conflicts intelligible is processed.

In the context of the Iran-Israel-United States conflict in 2026, this tripartite theoretical architecture carries concrete methodological implications: it compels the researcher to move simultaneously among the level of the internal political decision-making of each state, the level of the Middle Eastern security complex—with its historical patterns of structural enmity between Iran and Israel and North American penetration as a constitutive variable—and the level of the international system, where the transition toward multipolarity is altering the rules of the balance of power that Waltz (1959; 1979) believed to be invariable.

None of these levels explains, on its own, why the blockade of the Strait of Hormuz has produced a systemic shock of these dimensions; but all three together, articulated in a dialectical manner and with sensitivity to the historical specificities of the conflict, offer the most consistent analytical and interpretive platform available for a research undertaking of this nature.

2. Methodology

2.1. Geopolitical hermeneutics as a methodological approach

When confronted with an object of study of the nature and complexity of the armed conflict between Iran, Israel, and the United States—a phenomenon that operates simultaneously as a military event, a legal dispute, an energy crisis, and a reconfiguration of the international order—the question of method cannot be resolved by appealing to a single paradigm.

Consequently, this research adopts a methodological orientation that combines philosophical hermeneutics with the postulates of critical geopolitics.

This conviction arises not from an arbitrary choice but from the nature of the object itself: the texts, declarations, resolutions, strategic analyses, and political discourses that constitute this conflict are not transparent windows onto an objective reality, but rather discursive constructions laden with interests, ideologies, and power agendas that admit —and indeed demand— multiple readings without thereby exhausting their full significance.

In this regard, we draw on the interpretive tradition established by Gadamer (2004), according to which understanding a text does not amount to deciphering a code, but rather to entering into a living dialogue with it, one in which the interpreter brings their own historical and cultural horizons, their *Vorurteile* or prejudices in the hermeneutic sense, to produce what Gadamer (2004) called *Horizontverschmelzung*, or the fusion of horizons.

However, Gadamerian hermeneutics, in its original formulation, was not conceived for the analysis of geopolitical power discourses. For this reason, the present research proposes a methodological articulation —which we have termed geopolitical hermeneutics— that expresses itself as an interpretive modality that, while anchored in the philosophical tradition of Gadamer (2004), incorporates the critical sensibility of poststructural geopolitics —particularly that of Tuathail (1997)— in order to read international conflicts not as brute facts but as a discursive production of geopolitical meaning, in which there is always a who that names, a how that frames, and a for what purpose that orients the representation of space and of the "enemy".

It must be categorically clarified that the geopolitical hermeneutics proposed by this research is neither a terminological invention nor a conceptual artifice designed to distinguish itself artificially from existing traditions. It is, rather, a

genuine methodological response to a real epistemological problem: contemporary geopolitical discourse is no longer produced exclusively in the offices of foreign ministries or in the pages of the highest-impact scientific journals; it is also produced in think tank communiqués, in the headlines of international media outlets, in live-broadcast declarations of war, and in the reports of bodies such as the G7 or the IMF, among others, which circulate within hours of events taking place.

In this sense, geopolitical hermeneutics shares with critical geopolitics its postpositivist and poststructuralist character: it assumes, with Foucault (1997), that geopolitical knowledge is never neutral but always an effect of asymmetric relations of power and knowledge; and it shares with Gadamer (2004) the conviction that understanding a text —whether an academic article, a press release, or a military communiqué— requires situating the interpreter within their own historical horizon and acknowledging that understanding is always partial, dialogical, and unfinished.

From our point of view, its basic postulates can be articulated in three axiomatic propositions.

- First: geopolitical and geostrategic discourse is the surface upon which conflicts are narrated, justified, and normalized — both before they occur and after they have taken place. Its analysis is therefore a necessary, though not sufficient, condition for understanding the conflicts themselves.
- Second: the plurality of sources does not weaken analytical rigor but rather enriches it, provided that the criterion of selection is not the format of the source

but its capacity to contribute verifiable information about the phenomenon under study.

- Third: the interpretive act is always political and declaring that political character is epistemologically more honest than feigning a neutrality that no geopolitical analyst has ever been able to sustain in any coherent fashion.

In this regard, the work of Morgado (2023) proposes a theoretical alternative for geopolitical culture and literacy that converges with these postulates, arguing that rigorous geopolitical analysis cannot dispense with the interpretive dimension without losing its capacity to capture the complexity of the phenomena it studies, within a time and space determined by their history and geographical realities.

Its operationalization in this research followed a logic of interpretive triangulation that did not hierarchize sources according to their format — academic, institutional, or journalistic— but according to their analytical pertinence and their capacity to illuminate one of the layers of the conflict under study. In this context, all sources consulted were read not as documents of differing epistemic weight, but as distinct voices within a single geopolitical debate whose full meaning only emerges when they are heard together (Foucault, 1997).

Yet geopolitical hermeneutics is not exhausted by description; it also possesses a prospective dimension that is, perhaps, its most relevant contribution for makers of international policy. By deciphering the discursive patterns underlying conflicts —threat framings, legitimation narratives, strategic silences, mobilized historical analogies — the analyst can identify with greater precision the scenarios that actors are constructing before they materialize, because

international conflicts are always first discursive and then factual. Indeed, in geopolitical discourse, the enemy is named before it is fought, the war is justified before it is declared, and the agenda is fixed in documents before it is imposed on the ground.

This anticipatory capacity makes no claim to prediction in the positivist sense of the term, but it does offer decision-makers a more grounded cartography of possible future developments than that provided by intelligence analyses based exclusively on hard data. Indeed, the article by Palamarchuk et al. (2025) on strategic foresight methodology for national security confirms precisely this thesis, noting that approaches that combine discourse analysis with scenario modeling techniques produce more adaptive results in the face of geopolitical uncertainty than those that rely exclusively on quantitative methods.

In the words of Sakti and Basyar (2026), this methodology illustrates with precision how this type of critical discursive analysis, applied to geopolitics, makes it possible to dismantle the mechanisms of meaning production through which hegemonic actors normalize their military actions and seek to convince public opinion of the supposed legitimacy of their conduct.

2.2. The documentary corpus: stratification, scope, and selection criteria

The empirical substrate of this research is not limited to a single uniform type of source, nor can it be reduced to the conventional distinction between primary and secondary sources — a distinction that, within geopolitical hermeneutic analysis, proves, at the very least, insufficient. The documentary corpus has been constructed in a deliberate and stratified manner, following criteria that respond both to the analytical plurality inherent in the multilayer

approach (Waltz, 1959) and to the richness and depth demanded by hermeneutics as an interpretive practice (Gadamer, 2004).

In the first place, high-impact scientific articles published preferably within the last five years in the principal databases of international scientific interest — WOS, Scopus, DOAJ — were incorporated. These address topics ranging from the political economy of energy chokepoints to the international law of the use of force in contemporary conflicts, as well as the geopolitical theory of regional security complexes.

In the second place, monographs and classical works of geopolitical and internationalist thought were consulted —works by Waltz (1959; 1979), Singer (1961), Buzan and Wæver (2009), and Tuathail (1997), among others— whose canonical status makes them unavoidable references for any rigorous theoretical reflection on large-scale conflicts. In the third place, documents from think tanks with recognized academic and institutional standing were integrated into the corpus. Their value lies not in their neutrality —which it would be naive to presume— but precisely in the fact that their interpretive frameworks reveal the Western grammars of power through which strategic actors process and give shape to the conflict.

It should be clarified that the incorporation of these non-academic sources into the study corpus does not weaken the methodological rigor of the research; on the contrary, it enriches it: their critical hermeneutic reading makes it possible to identify the silences, emphases, and omissions that structure the dominant geopolitical discourse. As Boell and Cecez-Kecmanovic (2014) note, the hermeneutic review of literature is not an inventory operation but rather an iterative process of progressive understanding, in which the selection of sources

and their interpretation mutually condition one another in a circular movement that does not cease, but deepens with each successive reading of the texts and their contexts.

2.3. The analytical procedure: from documents to geopolitical discourse

Beyond their formal particularities —an academic article is not the same as a press release, nor as a report from an international organization— all documents comprising the corpus of this research were treated as texts in the hermeneutic sense of the term; that is to say, in the words of Regan (2012), as historically situated units of meaning, produced by actors with specific positions in the field of power and knowledge, and susceptible to being interrogated from multiple questions and interpretive perspectives.

More specifically, the analytical procedure adopted followed a discursive logic of three moments that do not operate linearly but in a spiral:

- A first moment of contextual reading, in which each document was situated within its context of production — who issues it, from which institution, in what conjuncture, and with what intended audience.
- A second moment of intertextual analysis, oriented toward identifying the explicit and implicit references among documents, the shared framings, the contradictions and the tensions that emerge when different voices interpret the same events from antagonistic positions.
- A third moment of interpretive synthesis, in which the analytical categories derived from the multilayer theoretical framework —systemic level, regional level, subsystemic level— were applied to organize the findings according to the three guiding research questions.

This procedure draws methodologically on critical discourse analysis in the tradition of Fairclough (1995), which distinguishes between the analysis of text, the analysis of discursive practice, and the analysis of sociocultural practice, thereby articulating the micro, meso, and macro levels of interpretation.

What differentiates it from a conventional application of critical discourse analysis is that geopolitical hermeneutics is not satisfied with describing linguistic patterns: it demands tracing how the discursive representations of space, threat, and sovereignty produce real effects on foreign policy decisions, on security perceptions, and on the normative architecture of the international system.

2.4. Stages of the research: a hermeneutic process in dialectical movement

The methodological architecture described above unfolded across four stages that, in keeping with the hermeneutic essence of the approach, should not be understood as rigid or successive phases, but rather as moments of a dialectical process of understanding that constantly returns upon itself in order to gain depth. The first stage consisted of problematization and preliminary inquiry.

Building upon the general research objective and the three guiding questions, a documentary search strategy was designed across academic databases and specialized sources, making it possible to delimit the initial interpretive horizon and, at the same time, to formulate the provisional analytical categories that would guide the reading of the corpus.

The second stage corresponded to the construction and reading of the corpus: the selected documents were read in a first round in an exploratory manner—paying attention to their argumentative structures, their conceptual frameworks, and their significant silences—and in a second round analytically, contrasting

their positions with respect to the three research axes and noting the tensions, convergences, and contradictions (Fairclough, 1995; Tuathail, 1997).

The third stage was one of interpretation and construction of meaning: applying the logic of Gadamer's (2004) hermeneutic circle, the initial categories were revised and enriched in light of the findings of the reading, in a back-and-forth movement between the parts and the whole of the documentary corpus — a movement that constitutes the epistemic core of Gadamerian hermeneutics.

The fourth and final stage was that of interpretive writing: the phase in which the analytical findings were organized according to the structure of the research, with a deliberate emphasis on the production of original arguments that do not merely report what the sources say, but rather formulate new interpretations of the economic, legal, and geopolitical repercussions of the conflict, derived from the articulation of the theoretical framework with the documentary corpus as a whole.

2.5. Tensions, limitations, and contradictions of the methodological architecture

It would be methodologically irresponsible to conclude the description of this approach without honestly acknowledging its tensions and limitations, because failing to do so would amount to falling back into the illusion of objectivity that geopolitical hermeneutics itself criticizes in others. The first limitation is the positionality of the researcher: every hermeneutic interpretation is, to some extent, the result of the horizon from which one reads, and that horizon is shaped, as Regan (2012) explains, by geographical, ideological, and epistemic coordinates that cannot be suspended by methodological fiat. They can only be made explicit and declared, so that the reader is in a position to assess their impact on the analysis.

The second tension is that which exists between interpretive depth and the breadth of the corpus. In the words of Debesay et al. (2008), a hermeneutic approach demands a dense and reflective reading of documents, which is difficult to reconcile with the aspiration to documentary exhaustiveness. The broader the corpus, the more superficial the reading tends to be; and the deeper the interpretation, the more selective the researcher must be in the inclusion of sources.

The third contradiction is intrinsic to critical geopolitics itself: by positing that all geopolitical representation is an ideological construction (Sakti & Basyar, 2026), the perspective runs the risk of sliding into an interpretive relativism that, taken to its extreme, denies the possibility of any normative judgment about conflicts — which, in the case of a conflict that has produced civilian victims, infrastructure destruction, and a humanitarian crisis of significant proportions, is ethically unacceptable.

For these and other reasons, this research assumes that tension without seeking to resolve it. Geopolitical hermeneutics does not lead to normative silence but, rather, to an epistemologically more self-aware stance, one that recognizes its own conditions of production without thereby renouncing the formulation of well-founded judgments about the reality it studies, with the ethical aim that such judgments serve to defend the interests of the vulnerable individuals and groups whose human dignity is affected by the armed conflicts in which they find themselves immersed, whether they will it or not.

3. Hermeneutic development of the findings

3.1. Closure of the Strait of Hormuz: energy flows, global production linkages, and asymmetric dependence

Broadly speaking, the question of how the sustained closure of the Strait of Hormuz reconfigures energy flows and global production linkages cannot be answered from a single dimension; doing so would be akin to describing an earthquake by measuring only the initial tremor and forgetting the aftershocks. For authors such as Chhaya (2026), what the closure of the strait has revealed with brutal clarity is that the logistical architecture of energy globalization was not designed to withstand sustained disruptions at its most critical nodes: the strait carried nearly twenty million barrels of oil per day — approximately one fifth of global hydrocarbon consumption— and around twenty percent of global liquefied natural gas trade, mainly from Qatar’s North Field terminals. In this context:

The sudden closure of the Strait of Hormuz following coordinated U.S.–Israeli strikes on Iran has triggered a systemic energy shock with global consequences. As tanker traffic collapses and oil prices surge, Asian economies emerge as the most exposed, revealing the structural fragility of a world still tethered to a single maritime chokepoint. (Chhaya, 2026, p. 1)

When that flow was interrupted, it did not generate a single shock but rather a chain of cascading disruptions that standard models of international trade had systematically underestimated by ignoring the bottleneck mechanism. The energy disruption was transmitted first to chemical production, then to the fertilizer industry —with urea nitrogen prices soaring by more than eighty percent in just two months— and finally to food prices, disproportionately affecting the most vulnerable economies (Gulf News, 2026). This chain of effects is not accidental:

it is the structural expression of an asymmetric dependence that international political economy had described theoretically, but which the 2026 conflict has made incontrovertibly visible.

Figure 1. Strait of Hormuz.



Source: adapted from Tucker (2026).

A recent study published by Arita et al. (2026) empirically demonstrates that geopolitical risks suppress energy trade in a markedly asymmetric way, producing sharper and more persistent contractions in emerging economies than in advanced ones, given their greater reliance on energy exports and their more limited institutional capacity to absorb shocks. What this research adds to that diagnosis is a geopolitical reading that econometric models cannot capture. Thus, the asymmetry is not only a difference in degree but also in position within the international system: countries of the Global South pay the costs of a war they did not decide, in a strait they do not control, for a supply chain they did not design.

Table 2. Closure of the Strait of Hormuz: impacts on energy flows, global production linkages, and asymmetric dependence structures between advanced and developing economies (2026).

Variable	Advanced economies	Emerging and developing economies	Source / evidence
Crude oil flows.	Moderate impact: access to strategic reserves (SPR), partial diversification toward the U.S., Brazil, Canada, and Kazakhstan; estimated GDP loss of -0.07% for the U.S.	Severe impact: countries such as Japan, South Korea, and India with more than 90% dependence on the strait; welfare losses 10–20 times higher than in advanced economies.	Hinz et al. (2026).
Liquefied natural gas (LNG).	Significant price increase; Europe forced into spot purchases from the U.S. and West Africa; global LNG deficit persists due to structural damage at Ras Laffan (Qatar, estimated recovery: 3–5 years).	Asian countries without strategic reserves (Bangladesh, Pakistan, Sri Lanka) face direct supply cuts; energy crisis with effects on industrial and household production.	Chhaya (2026).
Fertilizers and agricultural production.	Moderate exposure in urea and phosphate; stocks and domestic ammonia production act as a partial buffer (U.S., Western Europe).	Critical exposure: urea +80% in two months; World Bank fertilizer price index at its highest since 2022; projected decline in agricultural yields of 15–20% in South Asia by the end of 2026.	World Bank (2026).
Industrial supply chains.	Reorientation toward alternative routes with logistics cost overruns that can be absorbed in the medium term; strategic review of supply chain design.	Severe breakdown in chains dependent on petrochemical inputs from the Gulf; inability to absorb maritime insurance (+50%) and freight surcharges without passing them on to final consumers.	Bednarski et al. (2025).
Inflation and monetary policy.	Additional inflationary pressure of 0.3–0.5 percentage points with Brent above \$130; central banks caught between containing inflation and avoiding recession.	Inflationary impact amplified by currency depreciation associated with a stronger dollar; less fiscal space for subsidies; risk of sovereign debt crises in more fragile economies.	Neutral Observer (2026); World Bank (2026).

Variable	Advanced economies	Emerging and developing economies	Source / evidence
Energy transition.	Short-term slowdown in renewable investments; temporary reactivation of domestic fossil fuel production; tension between energy security and climate goals.	Structural brake on the renewable transition; greater reliance on domestic coal as an emergency alternative; widening of the North–South energy gap.	Hinz et al. (2026)

Methodological note: The construction of this table follows a logic of comparative analysis of differentiated impacts between two broad groups of economies, based on empirical evidence produced between March and June 2026 by international organizations (World Bank) and leading research centers (Kiel Institute; Neutral Observer). The analytical categories — energy flows, production linkages, asymmetric dependence — derive from the multilayer theoretical framework adopted in this research. The quantitative data should be interpreted with caution given the dynamic nature of the conflict and the partial availability of information at the time of writing.

What Table 2 reveals, when read through the lens of multilayer geopolitical theory, is not merely an unequal distribution of economic impacts —something any econometric model could have captured— but rather something of greater structural depth: the correspondence between a country’s position in the international system and its capacity either to absorb or to pass on the consequences of decisions taken by more powerful actors.

From Waltz’s (1959) systemic level, the closure of the strait is the foreseeable result of an energy-dependence structure that the great powers built over decades under the implicit assumption that the Persian Gulf would be “forever” a zone of orderly extraction under U.S. tutelage; when that assumption collapses, the system lays bare its accumulated contradictions.

From the regional level of Buzan and Wæver (2009), the table shows that the Middle Eastern security complex is not only a theater of military rivalries; it

is the central node of a system of energy, fertilizer, and industrial input flows whose disruption radiates outward to all the world's security complexes, confirming that the regional and global layers are, in this case, inseparable.

But perhaps the most unsettling reading is the one that emerges from Singer's (1961) subsystemic level: the economies of the Global South — Bangladesh, Pakistan, the countries of sub-Saharan Africa, the net fertilizer-importing nations of Latin America— did not take any of the decisions that led to the conflict, have no capacity to influence its resolution, and yet bear the heaviest costs of its continuation.

For the authors of this scientific article, this asymmetry between those who decide and those who pay is not an anomaly of the system; it is its underlying logic — the very logic that critical political economy has spent decades trying to make visible. The 2026 conflict has finally rendered it impossible to ignore.

3.2. Use of force, naval blockade, and the law of the sea: the international legality of the Iran–Israel–United States conflict in light of Jus Cogens*

Seldom in the recent history of international law has there been such a dense accumulation of interwoven unlawful acts in so short a time. From our perspective, the 2026 conflict is not only a military crisis; it is a legal crisis of structural proportions that simultaneously affects the two most important pillars of the contemporary international order: the prohibition of the use of force between States and the freedom of navigation on the seas.

The military operations carried out by Israel and the United States against Iranian nuclear facilities —launched with the attacks of June 2025 and continued

in the February–March 2026 offensive— were conducted without authorization from the Security Council and without either State managing to credibly establish the condition required by Article 51 of the Charter of the United Nations (United Nations, 1945), namely, the existence of a prior armed attack by Iran that would justify individual or collective self-defence.

International legal doctrine is unequivocal on this point: the prohibition of the use of force enshrined in Article 2(4) of the Charter (United Nations, 1945) constitutes a norm of *jus cogens* —a peremptory norm of general international law from which no derogation is permitted, whether by treaty or by contrary State practice— and the academic evidence accumulated over recent decades confirms, as Czapliński (2023) argues, that neither preventive self-defence, nor the protection of nationals, nor unauthorized humanitarian intervention can be read as accepted exceptions to the peremptory character of this prohibition.

Added to this is a specific violation of systemic scope: attacks on nuclear facilities under IAEA safeguards infringe not only the UN Charter (United Nations, 1945), but also the Treaty on the Non-Proliferation of Nuclear Weapons (United Nations, 1968) and IAEA Resolution GC(XXIX)/RES/444 (International Atomic Energy Agency, 1985), which since 1985 has explicitly declared that “[a]ny armed attack on and threat against nuclear facilities devoted to peaceful purposes constitutes a violation of the principles of the Charter of the United Nations and of international law”.

That said —and here lies the most uncomfortable legal complexity of the analysis — Iran’s response is equally open to criticism under international law: the closure of the Strait of Hormuz through selective mining, attacks on neutral vessels, and the imposition of a prior authorization regime for commercial transit

violates the transit passage regime set out in Articles 37 to 44 of UNCLOS (United Nations, 1982) —provisions that international jurisprudence and the prevailing doctrine consider part of customary international law binding on all States, including non-parties to the convention such as Iran and the United States— as well as the foundational jurisprudence of the *Corfu Channel* case (ICJ, 1949) (International Court of Justice, 1949), which affirmed the right of innocent passage through international straits even in situations of heightened tension. In this regard, the work of Elmohtadybellah (2026) analyzes the legality of Iran’s strike on U.S. forces in Qatar as a response to attacks on its nuclear facilities, concluding that, although the U.S. operation could be characterized as an “armed attack” for the purposes of Article 51 of the United Nations Charter (United Nations, 1945), Iran’s response does not meet the standards of proportionality and immediacy required by the customary law of self-defence.

The result, therefore, is a legal labyrinth in which all actors have violated fundamental norms of the international order, none has been able to invoke a fully robust legal title for its actions, and the United Nations collective security mechanism has been entirely sidelined by the paralysis of the Security Council.

Table 3. Comparative legal analysis: compatibility of the belligerent actions of Israel, the United States, and Iran with international law, *jus cogens**, the UN Charter, and the law of the sea (2025–2026).

Legal variable	Actions by Israel and the United States	Iran’s response	Applicable legal framework
Prohibition of the use of force (<i>jus cogens</i>).	Violation of Art. 2(4) UN Charter: strikes on Iranian territory without Security Council authorization and without a fully	Not directly applicable as the initial aggressor; however, Iran’s counter-attacks have caused	Art. 2(4) UN Charter (United Nations, 1945); <i>jus cogens</i> codified in Art. 53 VCLT (1969) (Vienna Convention on the

Legal variable	Actions by Israel and the United States	Iran’s response	Applicable legal framework
	substantiated self-defence claim.	damage in third States.	Law of Treaties, 1969); International Law Commission (2022).
Self-defence (Art. 51 UN Charter).	The US invokes “collective self-defence” with Israel; this claim is contested: there was no “prior armed attack” by Iran in the sense of Art. 51; preventive self-defence is not accepted by the majority of legal doctrine.	Iran can more plausibly invoke self-defence against attacks on its territory; however, its counter-attacks on US forces in Qatar and other Gulf countries raise proportionality concerns.	Art. 51 UN Charter (United Nations, 1945).
Attacks on nuclear facilities (Treaty on the Non-Proliferation of Nuclear Weapons – NPT / International Atomic Energy Agency – IAEA).	Violation of the NPT and IAEA Resolution GC(XXIX)/RES/444: attacks on facilities under safeguards; the IAEA has lost continuity of verification in Iran.	Suspension of cooperation with the IAEA since July 2025: violation of the NPT Safeguards Agreement and of obligations arising from the Additional Protocol.	NPT (United Nations, 1968); IAEA Resolution GC(XXIX)/RES/444 (International Atomic Energy Agency, 1985); NPT Safeguards Agreement (International Atomic Energy Agency, 1974).
Law of the sea: transit passage (UNCLOS).	The US (not a party to UNCLOS) argues that freedom of transit passage is customary international law binding on all States; this position is legally well founded.	Iran imposes a prior-authorization regime, tolls, and selective mining; this violates Arts. 37–44 UNCLOS and customary law of the sea; transit passage may not be suspended under any circumstances.	UNCLOS, Arts. 37–44 (United Nations, 1982).

Legal variable	Actions by Israel and the United States	Iran’s response	Applicable legal framework
International humanitarian law (IHL).	Strikes on civilian infrastructure and nuclear facilities with consequences for the civilian population: possible violations of the IHL principles of distinction and proportionality.	Attacks on vessels belonging to neutral third States: violation of the principle of distinction and of the immunity of non-belligerent States.	Geneva Conventions (International Committee of the Red Cross, 1949); Additional Protocol I (International Committee of the Red Cross, 1977); customary IHL.
Paralysis of the collective security system.	The US blocks any Security Council resolution by exercising its veto, emptying the collective security system of its essential function.	Iran rejects Security Council resolutions and IAEA mediation, thereby widening the gap in multilateral governance.	Chapter VII UN Charter; Art. 25 UN Charter; Arts. 48-49 UN Charter (United Nations, 1945).

Methodological note: This table organizes the legal analysis according to a logic of comparative normative compatibility, applying the primary sources of international law (treaties, binding resolutions, ICJ jurisprudence) to the specific actions of each belligerent party. Its purpose is not to issue a judicial verdict, but to analytically structure the map of unlawful acts and normative tensions in order to facilitate theoretical discussion. The sources used combine primary normative instruments and international jurisprudence.

What Table 3 places before the analyst is not simply a list of legal violations; it is the portrait of an international normative system operating under conditions of extreme stress and, in doing so, revealing both its zones of strength and its structural fractures. From Waltz’s (1959; 1979) systemic level, the reading is stark: *jus cogens* norms—including the prohibition of the use of force— were designed to be resistant to the pressures of power, but their effectiveness ultimately depends on the most powerful actors having incentives to uphold them. When one of them decides to ignore those norms, the system, by itself, lacks sufficient coercive mechanisms to enforce them.

The Security Council —a collective security architecture designed precisely for such scenarios— has been paralyzed by the geometry of the veto, reproducing the pattern already observed in the conflicts in Ukraine, Gaza, and other episodes of the last decade, which have progressively eroded the system’s credibility. From the regional level (Buzan & Wæver, 2009), the table reveals something equally significant: the gravest violations of the law of the sea do not only affect Iran and its direct adversaries, but all States whose maritime security depends on the Strait of Hormuz — which in practice means dozens of countries that have no part in the conflict yet suffer its legal and economic consequences.

This is precisely the dimension that regional security theory captures better than any other framework: the consequences of the conflict do not respect the boundaries of the Middle Eastern security complex but radiate outwards to all the complexes interconnected through the strait, transforming a regional dispute into a global crisis of maritime governance. And from Singer’s (1961) subsystemic level there emerges the deepest paradox: Israel and the United States have argued that their actions were legally justified by the existential risk allegedly posed by Iran’s nuclear program, appealing to a form of anticipatory self-defence that most legal doctrine rejects.

Iran, for its part, has argued that the closure of the strait was a legitimate defensive response to attacks on its sovereignty. The result of these mutually self-legitimizing narratives is that each actor has produced a reading of international law designed to justify its own actions, stripping the normative system of the objectivity it would need in order to function as an effective arbiter of conflicts.

This is perhaps the most challenging lesson that the 2026 conflict leaves for international law: not so much that norms are ignored —that has happened

before— but that each party has developed an argumentative architecture sufficiently sophisticated to present itself as the guardian of those norms, blurring the line between the application of the law and its strategic manipulation within the hegemonic and counter-hegemonic political discourse that underpins the current world order (Bednarski et al., 2025).

3.3. Multipolar order in reconfiguration: alliances, regional security, and power redistribution in the context of the 2026 conflict

When international relations analysts debated, barely half a decade ago, the transition toward a multipolar order, they did so as if it were a long, gradual, and relatively orderly process (Bukhari, 2025). The 2026 conflict has shattered that expectation of gradualism: in a matter of weeks, the alliance architecture, the credibility of security guarantees offered by the hegemonic West, and the distribution of influence in the Middle East have been reconfigured at a speed that no power-transition model had anticipated with sufficient precision. In this context, three scenarios clearly emerge from our analysis.

- The first, which we term *fragmented multipolarity*, is the most likely in the short and medium term: no actor —neither the United States, nor China, nor Russia— has succeeded in imposing an alternative hegemonic narrative, and the result is a system in which influence is exercised transactionally, alliances are situational, and deterrence mechanisms have become unpredictable because they operate simultaneously on the military, economic, and digital planes.

- The second scenario, one of *eastward rebalancing*, points to a redistribution of influence toward the emerging powers of the China–Russia–BRICS+ axis: the joint naval exercises conducted by China, Russia, Iran, and several Global South

states in the context of the conflict indicate that Beijing is strategically capitalizing on the relative weakness of the United States in the region to consolidate its presence as an alternative to the prevailing Western order.

- The third scenario, more incipient but significant, is that of *emergent regional autonomy*: the Gulf States —in particular Saudi Arabia, Qatar, and the United Arab Emirates— have adopted hedging strategies that combine continued security dependence on the United States with a diversification of alliances toward China, Russia, and organizations such as the Shanghai Cooperation Organisation (SCO) and BRICS+, signaling that the era of a single external stabilizer has come to an end.

A recent article by Papageorgiou and Jamali (2025) documents with precision how the Gulf states are using their accession to the Shanghai Cooperation Organisation as an instrument of institutional balancing vis-à-vis emerging powers, revealing the depth of the reconfiguration underway. What none of the three scenarios allows us to foresee is which of them will ultimately consolidate: the 2026 conflict has opened a window of contingency in which the architecture of the international order remains profoundly uncertain — and that uncertainty is, in itself, a defining feature of the world that is emerging.

Table 4. Reconfiguration of the multipolar order arising from the 2026 Iran–Israel–United States conflict: alliances, regional security, and power redistribution.

Variable	Description of change	Main actors	Emerging trend	Source
Reconfiguration of the multipolar order.	Acceleration of the transition from U.S. unipolarity toward a fragmented multipolarity; absence of a new consolidated	US, China, Russia, EU, BRICS+.	Fragmented multipolarity: diffuse power, contested rules, weakened institutions.	Chung (2026).

Variable	Description of change	Main actors	Emerging trend	Source
	hegemon; normative disputes over the rules of the international order.			
Existing alliances.	Weakening of Atlantic alliances: the US acted without prior consultation with its European allies; emergence of the “Hexagon Alliance” (Israel–India–Greece–Cyprus–UAE–Somaliland); BRICS+ naval exercises as a signal of counter-balancing.	Israel, India, UAE, Greece, Cyprus, Somaliland / China, Russia, Iran, South Africa.	More transactional and situational alliances; decline of permanent ideological alliances.	Eshetu (2026).
Regional security architecture in the Middle East.	Transformation of the regional security system: the US shifts from stabilizer to catalyst of escalation; erosion of the Gulf Cooperation Council (GCC) security guarantees; emergence of hedging and regional multi-alignment strategies.	Saudi Arabia, UAE, Qatar, Oman, Turkey, Egypt.	Middle East as a more autonomous but more unstable security system; end of the “single external stabilizer”.	Bukhari (2025).
Redistribution of influence: conventional powers.	The US maintains military superiority but loses normative legitimacy and credibility as a guarantor of stability; Europe is weakened and sidelined from the conflict; Russia exploits US distraction to consolidate positions in its periphery.	US, Europe, Russia.	Decoupling between military power and political legitimacy; US unilateralism limits Western cohesion.	Chhaya (2026).

Variable	Description of change	Main actors	Emerging trend	Source
Redistribution of influence: emerging powers	China positions itself as a mediating power and alternative provider of global governance; India capitalizes on its role as “champion of the Global South” during its BRICS+ 2026 presidency; BRICS+ accumulates demographic and economic critical mass as an alternative power platform.	China, India, BRICS+.	Shift of the geopolitical center of gravity toward the Indo-Pacific and the Global South.	Wso and Mahmood (2025).
Multilateral governance.	Paralysis of the UN Security Council due to the veto; emergence of alternative platforms (BRICS+, SCO) as governance fora; crisis of the “rules-based international order” as a contested Western concept.	UN, BRICS+, SCO, Arab League.	Institutional bifurcation: parallel Western and non-Western orders; fragmentation of global governance.	Dworkin et al. (2026).

Methodological note: This table organizes the analysis of multipolar reconfiguration around six variables articulated within the multilayer theoretical framework. The sources combine reports from internationally recognized policy institutes and academic articles published between 2025 and 2026. The “emerging trends” do not constitute deterministic projections but plausible scenarios derived from the evidence available at the time of writing this article; they must therefore be read with the methodological caution appropriate to any analysis of an evolving situation.

To read Table 4 hermeneutically, from the perspective of multilayer geopolitical theory, is not simply to assign each row to a level of analysis; it is to ask about the interactions between layers that generate the dynamics the table describes. And the first thing that stands out is that the reconfiguration of the multipolar order is not taking place from the top —from the systemic level, as

Waltzian balance-of-power models would predict— but from below and from the margins. It is the regional middle powers, the Gulf states with their hedging strategies, and the coalitions of the Global South with their alternative platforms — the actors that classical theory classified as “secondary” — who are actively shaping the new order with a degree of agency that structural realism, in Waltz’s (1959; 1979) formulation, could not anticipate.

From Buzan and Wæver’s (2009) regional level, the table reveals something that the academic literature on the Middle Eastern security complex had begun to point out before the conflict, but which 2026 has definitively confirmed: the regional system is moving from a “penetrated system” model —in which an external power, the United States, acted as the ultimate arbiter of regional balances— toward a model of greater regional autonomy, more unstable because it lacks a central stabilizer, but also more representative of the real correlations of force within the complex itself. This transition is neither linear nor irreversible; as Papageorgiou and Jamali (2025) note, the Gulf states are not abandoning their relationship with Washington but redefining its terms, seeking U.S. military protection without the political subordination that has historically accompanied it.

From Singer’s (1961) subsystemic level, finally, the table reveals the paradox most fertile for future research: the 2026 conflict has produced winners who did not fight — China has accumulated strategic leverage without firing a single shot — and losers who also did not fight — the economies of the Global South that are absorbing the energy and food costs of the conflict. This suggests that, in the emerging multipolar order, the capacity to inflict or absorb systemic consequences has become decoupled from direct participation in conflicts,

producing a fundamentally new geography of power that none of the classical theories of international relations were designed to explain.

Conclusion

The first plane that clearly emerges from this integrative analysis is the economic one, and what it reveals is, in essence, a paradox that conventional models of international political economy had not taken seriously enough: the vulnerability of the global economic system does not stem from its weakest points, but from its most efficient ones. The Strait of Hormuz was precisely that—a node of maximum logistical efficiency, a corridor through which nearly twenty percent of the world's crude oil and twenty-five percent of its liquefied natural gas flowed (Arita et al., 2026)—and it is exactly that concentration of flows that turned it into a weapon.

When Iran de facto shut down the strait through drones and selective mining, it did not attack a military position; it attacked the very architecture of energy globalization, an architecture that decades of supply-chain optimization had built on the assumption that peace at chokepoints was an almost permanent good.

Analysis of the available data shows that the sustained closure of the strait did not produce a single shock but a chain of cascading disruptions: first crude prices, then freight rates, then fertilizers, then food—disproportionately affecting the economies of the Global South, those that had the least to do with the decisions that unleashed the conflict. In this finding lies one of the core theses sustained by this research: the Iran–Israel–United States conflict is not only a regional war; it is an empirical demonstration that the architecture of contemporary (liberal,

Western) economic globalization has produced a regime of asymmetric interdependence in which the most vulnerable are precisely those who have no voice in the decisions that generate crises. Indeed, a recent study by Supaino et al. (2026) confirms that the macroeconomic impacts of the conflict will exceed one trillion dollars in cumulative effect over the coming decade, making this conflict the greatest geopolitical disruption to world trade since the 1973 oil crisis.

The second plane of analysis —the legal one— leaves an even more unsettling impression than the economic dimension, because what it reveals is not simply the non-compliance with norms, but something of deeper structural gravity: the erosion of the political will to uphold them. From the perspective of international law, the 2026 conflict thus constitutes an accumulation of unlawful acts that no actor has been able or willing to stop.

The military operations by Israel and the United States against Iranian nuclear facilities —undertaken without Security Council authorization and without satisfying the conditions of Article 51 of the Charter of the United Nations (United Nations, 1945) that would enable self-defence— represent what the most rigorous doctrine in the field characterizes as an act of aggression contrary to *jus cogens*.

But Iran's response —the closure of the Strait through mining and attacks on neutral vessels— is no less problematic from the standpoint of the law of the sea: UNCLOS (United Nations, 1982), customary law of the sea, and State practice are unanimous in prohibiting the obstruction of transit passage through international straits, even in situations of armed conflict.

What this analysis brings to the fore is not the novelty of these violations — the history of international law is marked by selective non-compliance— but rather the fact that, in 2026, none of the collective response mechanisms functioned: the Security Council remained paralyzed by the geometry of the veto; international courts were kept beyond the immediate reach of the conflict; and the international legal community, however unanimous it may have been in its diagnosis, lacked real coercive power. This finding is, philosophically, the most disturbing: it suggests that contemporary international law is increasingly a shared moral vocabulary without an institutional grammar that can render it binding when the most powerful actors decide to ignore it.

The third plane —the geopolitical one— is perhaps the hardest to address without slipping into the kind of structural determinism that this research, on the basis of its epistemological premises, has sought to avoid. What the Iran–Israel–United States conflict has laid bare is not simply the transition toward a multipolar order —a thesis the academy has been advancing for at least a decade— but the concrete conditions under which that multipolarity is crystallizing: fragmented, asymmetric, and without any actor possessing both the political will and the legitimacy required to sustain common rules.

The notion of *fragmented multipolarity* that emerges from this analysis differs from the classical multipolarity of international relations theory, for this is not a system of great powers in equilibrium —as in the Vienna order of the nineteenth century—but rather a scenario in which actors accumulate disruptive capacity without assuming the systemic responsibility that historically accompanied hegemonic power.

From the standpoint of multilayer theory, the most revealing aspect is the interaction between layers: it was the dynamics of the Middle Eastern regional security complex — with its historical patterns of structural enmity between Iran and Israel and the constitutive penetration of the United States — that triggered the chain of decisions producing the systemic shock; but it was the structure of the global system— the redistribution of power toward China and Russia, the erosion of Atlantic alliances, the inability of the Security Council to act — that determined that this shock could not be contained. Neither layer, read in isolation, offers an explanation; only their simultaneous, dialectical reading allows us to understand how a regional conflict became, in a matter of weeks, a systemic event of civilizational scope.

This research has opened more questions than it has been able to close — which is not a flaw, but a sign that it has touched a living object of study in the midst of dialectical transformation. The following lines of inquiry are therefore not decorative suggestions, but genuinely urgent work agendas for the international scholarly community. At the level of political economy, a systematic investigation is still needed into the differentiated effects of the Strait of Hormuz disruption on the economies of the Global South, particularly those that combine high dependence on energy imports with limited fiscal space to sustain compensatory subsidies. The underlying question is whether the 2026 conflict has produced a new modality of structural dependence or whether, on the contrary, it has accelerated processes of energy diversification that are reconfiguring North–South relations.

At the legal level, it is essential to investigate the question of reforming the United Nations collective security system in light of the pattern of institutional

paralysis revealed by this and other recent conflicts: under what conditions is it possible to construct alternative mechanisms for the enforcement of international law that do not depend on the unanimity of the great powers? At the geopolitical level, the most urgent question concerns the stability of the post-hegemonic order that is emerging: is fragmented multipolarity a transitional stage on the way to a new equilibrium, or a lasting structural condition that renders the proliferation of conflicts inevitable?

Finally, at the methodological and gnoseological level, the concept of *geopolitical hermeneutics* outlined here still needs to be developed with greater systematization, exploring its epistemological foundations in more depth and subjecting it to the critical scrutiny of the specialized academic community.

Finally, it is clear that every honest piece of research ends with a double accounting: what it has contributed and what it has left unresolved. This work is no exception. On the credit side, it offers three contributions we regard as genuine. First, it has demonstrated the relevance and operability of multilayer theory — articulated through Waltz (1959), Singer (1961), and Buzan et al. (1998)— for the analysis of highly complex contemporary conflicts, showing that no single level of analysis is sufficient on its own and that their dialectical articulation produces qualitatively superior readings to those offered by one-dimensional approaches.

Second, it has proposed the concept of *geopolitical hermeneutics* as a methodological device that combines the Gadamerian tradition of interpretation with the critical sensibility of poststructural geopolitics, opening a methodological path that can be used and refined in subsequent research. Third, it has organized and synthesized a broad and heterogeneous documentary corpus —produced in the very midst of the conflict— in order to offer a structured reading of its

economic, legal, and geopolitical repercussions, contributing to a deep, rather than merely extensive, understanding in terms of data of a phenomenon that will continue to demand rigorous critical analysis for years to come.

Nonetheless, this work has not been able to address with the depth they deserve at least three dimensions: the effects of the conflict on the concrete human communities living in the affected areas — the humanitarian and human-rights dimension; the role of information and disinformation as a constitutive dimension of the conflict in the digital age; and the implications of the conflict for global climate governance, at a time when the energy crisis has slowed investments in the energy transition that the planet cannot afford to postpone.

These absences are not accidental; they reflect the inevitable limits of any research that takes the complexity of its object seriously and that, rather than pretending to have exhausted it, chooses the intellectual honesty of acknowledging what still remains to be understood within the evolving field of critical geopolitics in today's world.

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Conflict of interest and originality declaration

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