Opinion Paper

119/2026 19/11/2026

*Ignacio Urbasos**

Dissecting the diesel crisis: energy insecurity in the age of asymmetric warfare



Dissecting the diesel crisis: energy insecurity in the age of asymmetric warfare

Abstract:

The diesel crisis is the most visible symptom of a paradigm shift in energy security. In an international system that has left the unipolar order behind, and in which great-power competition is making the use of force more frequent, the Fourth Industrial Revolution has made offensive capabilities cheaper and more precise. With long-range drones and missiles, commercial satellite imagery and artificial intelligence, state and non-state actors can strike critical infrastructure thousands of kilometres away. Refineries, which are large, visible and slow to repair, have thus become prime targets of asymmetric warfare. The Iran war, the closure of the Strait of Hormuz, Ukrainian strikes on Russia and the Houthi offensive have driven diesel prices to record highs, a reflection of this new geopolitical reality.

Keywords:

Critical infrastructure, energy security, energy geopolitics, Ukraine, Russia, Middle East, Hormuz.

How to quote:

URBASOS, Ignacio. *Dissecting the diesel crisis: energy insecurity in the face of the new asymmetric warfare*. Opinion Paper. IEEE 119/2026.

***NOTE:** The ideas contained in the **Opinion Papers** shall be responsibility of their authors, without necessarily reflecting the thinking of the IEEE or the Ministry of Defense.

Introduction

The world is going through its second major energy crisis in just four years. In 2022, the trigger was Russia's invasion of Ukraine, which within a few months dismantled energy relations between the West and Russia that had been built up over half a century[1]. This time, the origin lies in the Persian Gulf. Following the US and Israeli strikes at the end of February, Iran responded by closing the Strait of Hormuz for the first time in history. Until then, some 21 million barrels of oil a day, around a fifth of global consumption, had passed through the strait. Since then, neither the April ceasefire, nor the memorandum signed in June between Washington and Tehran, nor the recent attempts to escort tanker convoys under US protection have managed to reopen it on a lasting basis[2]. The International Energy Agency already regards it as the largest oil supply disruption in history[3].

Other fronts have since compounded the crisis. Ukraine has turned Russian refineries into a systematic target of its long-range drone campaign. In the Red Sea, *Ansar Allah*, the Houthis, declared a naval blockade against Saudi Arabia in July and have successfully resumed their military offensive in Yemen, seizing strategic positions on the Bab el-Mandeb. Meanwhile, a drone attack attributed to Iran-aligned Iraqi militias forced the temporary closure of the East-West pipeline[4], which carries Gulf crude to Yanbu on the Red Sea, while the Houthis have continued to strike Saudi Arabia's critical infrastructure.

Despite the severity and duration of these crises, the global energy system has proved remarkably resilient[5], avoiding shortages and keeping oil and natural gas prices at levels that are high but bearable for the world economy. However, the indicator that best captures the nature of this crisis is not the price of crude, but that of middle distillates, and specifically diesel.

---

[1] URBASOS, Ignacio, 'El futuro del gas ruso en la Unión Europea' [The future of Russian gas in the European Union], Elcano Royal Institute, 8 March 2024, https://www.realinstitutoelcano.org/policy-paper/el-futuro-del-gas-ruso-en-la-union-europea/

[2] Although the volumes of crude transiting Hormuz have intermittently returned to levels close to those seen before February 2026, volumes of natural gas, refined products and fertilisers remain very low.

[3] KERN, Michael, 'IEA Chief: Current Energy Crisis Worse Than 1973, 1979, and 2022 Combined', OilPrice.com, 7 April 2026, https://oilprice.com/Latest-Energy-News/World-News/IEA-Chief-Current-Energy-Crisis-Worse-Than-1973-1979-and-2022-Combined.html

[4] ENGLAND, Andrew, 'Saudi pipeline attack exposes potent Iraqi militia threat', Financial Times, 13 September 2026, https://www.ft.com/content/b60624fb-0a09-45e6-b148-b7a5ca38f83e

[5] BORDOFF, Jason and BLAS, Javier, 'Javier Blas on Lessons from Closing Hormuz (So Far)', Columbia Energy Exchange podcast, Center on Global Energy Policy, Columbia University, 4 August 2026, https://www.energypolicy.columbia.edu/javier-blas-on-lessons-from-closing-hormuz-so-far/

In August, the diesel crack spread, that is, the difference between the price of diesel and that of the barrel of crude from which it is produced, exceeded $110 for the first time on the US Gulf Coast, and also reached record highs in Europe[6]. If the energy crises of the 1970s were defined by a shortage of crude, and that of 2022 by a shortage of natural gas, everything suggests that the Hormuz crisis will be, above all, a crisis of refined products[7]. This is no coincidence: refineries are the most concentrated and complex links in the entire oil value chain, and the slowest to repair, which is why they are the most exposed when infrastructure becomes a military target.

This paper argues that this situation is the result of the crisis of hegemony the world has been experiencing since the end of the unipolar order. The power vacuum left by the end of US supremacy is being filled by the return of the use of force which, in the context of the Fourth Industrial Revolution, has acquired greater destructive power by generating new offensive vectors (drones, satellite information and artificial intelligence) that are accessible and affordable for asymmetric warfare. Critical infrastructure located thousands of kilometres from the aggressor is now a feasible target, which makes it vulnerable. Owing to their exposure, their large size, their location at recognisable sites and their importance for security of supply, refineries have now become prime targets, reshaping the geopolitics of energy, which is entering a worrying phase of supply insecurity.

The causes of the shortage: refining trapped, bombed and cut off from trade

The first cause of this crisis lies in the Persian Gulf, where several of the world's largest export refineries have been built over the past two decades, such as Al Zour in Kuwait, Ruwais in the United Arab Emirates, and SATORP and Ras Tanura in Saudi Arabia, all designed to supply diesel and kerosene to Europe, Asia and Africa. Before the war, the region accounted for nearly 20% of the kerosene and around 10% of the diesel traded internationally[8]. With Hormuz closed, much of these plants' output cannot leave the

[6] MILLAR, Richard, 'Diesel premium in Europe jumps to record high', Financial Times, 3 September 2026, https://www.ft.com/content/f117f347-e1e0-457c-83fc-ba4745581bb2

[7] MAJKUT, Joseph, KOTKIN, Masha, RUSSELL, Caroline and GARCIA, Alex, 'Six Charts to Explain the Global Energy Crisis', Center for Strategic and International Studies (CSIS), 17 September 2026, https://www.csis.org/analysis/six-charts-explain-global-energy-crisis

[8] BURNETT, Kate, LI, Kevin, BASQUEL, Lisa and O'CONNOR, Chloe, '15 charts that explain why the Strait of Hormuz shutdown matters for the global economy', Atlantic Council, 14 April 2026, https://www.atlanticcouncil.org/dispatches/15-charts-that-explain-why-the-strait-of-hormuz-shutdown-matters-for-the-global-economy/

region, and Gulf refineries have cut their activity by 25%[9] because they are unable to export their products and their storage capacity is saturated (Figure 1). Furthermore, unlike the crude produced in the Gulf, which can rely on pipelines capable of diverting much of Saudi and Emirati production, there is no comparable infrastructure for transporting refined products other than by sea through Hormuz.

The conflict has also caused physical damage. Since March, Iranian strikes have hit several of the Gulf's main refineries[10]. Some have partially resumed operations, but the industry takes it for granted that, even once the geopolitical situation returns to normal, the full recovery of the region's energy system will take months.

The second cause lies in Russia, which before the invasion of Ukraine was the world's largest diesel exporter. Following the 2023 European embargo, that diesel was redirected to Turkey, Brazil, North Africa and the Middle East[11]. The Ukrainian campaign against Russian refineries, which began in 2024, has been at its most intense since March 2026 and, according to the International Energy Agency, Ukraine struck a refinery every three days on average during the first eight months of 2026. Since June, between 20% and 50% of Russian refining capacity has been disrupted[12]. According to the latest data, in October some 3.8 million barrels per day of capacity was offline owing to unplanned outages at 17 refineries across the country. In response, and in order to contain domestic prices, Russia has increased its fuel imports and banned diesel exports during the summer months, removing critical supply from an already unbalanced market.

[9] DEVESA, Tiago, KRISHNAN, Mekala et al., 'Aftershocks: Energy security beyond the Strait of Hormuz crisis', McKinsey Global Institute, 17 September 2026, https://www.mckinsey.com/mgi/our-research/aftershocks-energy-security-beyond-the-strait-of-hormuz-crisis

[10] In Saudi Arabia, the strikes have affected Ras Tanura, SATORP (the Aramco-TotalEnergies joint venture in Jubail) and the Riyadh refinery. They have also hit Bapco's Sitra refinery in Bahrain, which declared force majeure; ADNOC's Ruwais refinery in the United Arab Emirates; and KNPC's Mina al-Ahmadi refinery in Kuwait.

[11] WICKENDEN, Luke and LEVI, Isaac, 'September 2026: Monthly analysis of Russian fossil fuel exports and sanctions', Centre for Research on Energy and Clean Air (CREA), 16 October 2026, https://energyandcleanair.org/september-2026-monthly-analysis-of-russian-fossil-fuel-exports-and-sanctions/

[12] MARTIN, David and VATMAN, Talya, 'Russian refining sector struggles amid intensifying Ukrainian attacks', International Energy Agency, 17 September 2026, https://www.iea.org/commentaries/russian-refining-sector-struggles-amid-intensifying-ukrainian-attacks

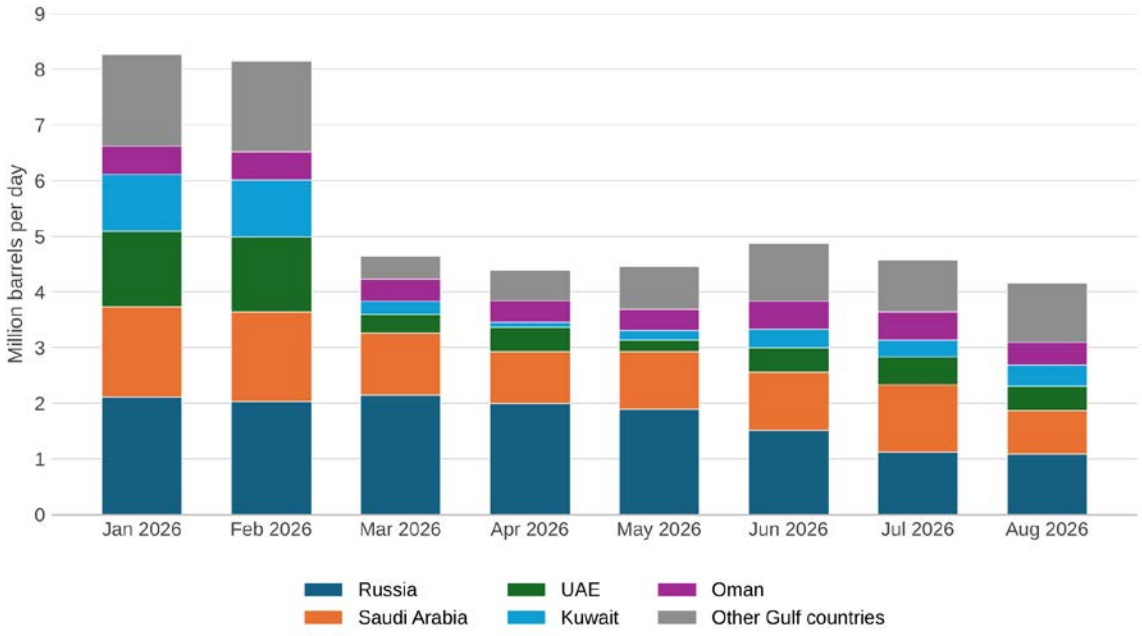


Figure 1. Oil product exports from Russia and the Gulf countries (million barrels per day)
Source: Kpler.

When Russian refining capacity will return to normal remains uncertain. Minor damage to an atmospheric distillation unit can be repaired in one or two weeks. But when drones hit more complex conversion units, such as hydrocrackers or hydrotreaters, which are precisely the units that produce export-quality diesel, repairs can take six to eight months[13]. Western sanctions also hinder access to specialised equipment and suppliers, so each attack places incremental strain on the ability of Russia's refining industry to respond. Moreover, because Ukraine repeatedly strikes the same facilities, such as Rosneft's Volgograd refinery, which has been hit twelve times, many plants suffer one shutdown after another without being able to deploy engineering teams to carry out repairs in the normal way.

China, the other major player in global refining, has aggravated the problem. On 5 March, Beijing ordered its refineries to suspend new fuel export contracts and sharply reduced refining activity to protect its supply and its strategic crude reserves. Until July, exports were limited to minimal quotas for a handful of South-East Asian countries[14]. Authorised

[13] MARTIN, David and VATMAN, Talya, 'Russian refining sector struggles amid intensifying Ukrainian attacks', International Energy Agency, 17 September 2026, https://www.iea.org/commentaries/russian-refining-sector-struggles-amid-intensifying-ukrainian-attacks

[14] DOWNS, Erica and MEIDAN, Michal, 'How China Is Managing Lower Oil Imports', Center on Global Energy Policy, Columbia University, 13 August 2026, https://www.energypolicy.columbia.edu/how-china-is-managing-lower-oil-imports/

export quotas were raised over the summer, easing the situation in the Asian market, but the lesson is clear: in a crisis, China will prioritise its domestic market.

Not even the world's leading diesel exporter is immune to this logic. With diesel above six dollars a gallon and the midterm elections due in November, a ban on diesel exports is being openly discussed in the US Congress. The White House has not adopted the measure, but it used it as a threat to force its G7 partners to agree, on 2 October, to release 100 million barrels from their strategic reserves, with priority given to diesel, in exchange for a commitment not to restrict exports[15]. The United States' protectionist track record on energy sets a clear precedent. It was not until December 2015 that the Obama Administration lifted the ban on exporting oil produced on US soil, a measure that had been in force for more than 40 years and dated back to the oil crisis of the 1970s[16].

The energy crisis becomes entrenched

There is no sign that the closure of Hormuz will be resolved any time soon. Negotiations between Washington and Tehran have stalled. Iran has consolidated a war economy and a policy of all-out resistance whose sole aim is the survival of the regime and its elites. After weathering the March military offensive and reorganising internally, the most hard-line factions appear to be gaining the upper hand within Iran, hardening the country's positions in its negotiations with the United States[17]. In particular, Iran is demanding international recognition of its sovereignty over the strait, shared with Oman, to charge a transit toll, emulating Turkey's model in the Bosphorus and the Dardanelles[18]. In May, Tehran set up its own authority to manage the strait and is seeking to impose this arrangement as a fait accompli: since then, some of the vessels crossing Hormuz have used the route designated by Iran and, presumably, agreed to pay[19]. For the United States, and especially for Israel, these conditions are unacceptable and, together with other elements of the negotiations such as the nuclear programme or Iran's future support

[15] LEFEBVRE, Ben, '"Dammit, something has to happen": White House preparing plan for 90-day diesel exports ban', Politico, 23 September 2026, https://www.politico.com/news/2026/09/23/white-house-ban-diesel-01089294
[16] COLGAN, Jeff D. and VAN DE GRAAF, Thijs, 'A crude reversal: The political economy of the United States crude oil export policy', Energy Research & Social Science, 2016.
[17] VATANKA, Alex, 'Iranian Domestic Politics: Who Is Really in Charge in Tehran Now?', Middle East Institute, 29 September 2026, https://mei.edu/publication/iranian-domestic-politics-who-is-really-in-charge-in-tehran-now/
[18] The international law of the sea does not allow tolls to be levied for passage through international straits, but it does allow a coastal State to charge vessels in transit for services rendered, which amounts to a de facto toll.
[19] 'Iran grants permission for some Iraqi oil tankers to pass through Hormuz', Al Jazeera, 22 August 2026, https://www.aljazeera.com/news/2026/8/22/iran-grants-permission-for-some-iraqi-oil-tankers-to-pass-through-hormuz

for its allied militias in the region, they greatly reduce the chances of an agreement.

Ansar Allah's offensive in Yemen and the Bab el-Mandeb strengthens Iran's negotiating position. By threatening the export of Saudi crude via the Red Sea, the Houthis are jeopardising the main alternative to Hormuz for Gulf crude. It would be a mistake to underestimate their ability to sustain and carry out this threat. For more than a decade, the Houthis have withstood the intervention of the Saudi-led coalition, US and Israeli bombing campaigns and a permanent economic blockade. Between 2023 and 2025 they showed that, with cheap missiles and drones and despite their clear military inferiority, they could divert a large share of global maritime traffic towards the Cape of Good Hope. Their record is one of resilience and of a remarkable capacity to cause disruption far beyond their military weight.

Their recent advances, including the capture of Mocha and several strategic islands near the strait, show that they have reignited Yemen's civil war, inflicting a heavy defeat on the internationally recognised Yemeni government, which is strongly backed by Saudi Arabia. If Riyadh keeps up its military response, the Houthis are likely to step up the pressure by continuing to attack the Kingdom's critical infrastructure, as they did at Abqaiq in 2019 and at Aramco's facilities in Jeddah in 2022. Red Sea refineries, such as those at Yanbu or Jizan, very close to the Houthi-controlled Yemeni border, are obvious targets and have already come under attack, exacerbating the shortage of distillates. All of this, moreover, is happening without the United States showing any interest in intervening, with its naval resources already committed in Hormuz and little political appetite for opening a new front in Yemen[20].

Nor has the US military response in the strait solved the distillates problem. The tanker escorts, which Washington launched in May with Operation Project Freedom and reinforced over the summer with a corridor along the Omani coast, have managed to restore some flows, but unevenly. In August, Energy Secretary Chris Wright went so far as to claim that almost nine million barrels a day were leaving through the strait on average, and in October he raised that figure to between 13 and 14 million, or 80-90% of the pre-war level. These figures are hard to verify, because many vessels sail with their

[20] WINTOUR, Patrick, 'US officials decide against backing Saudi Arabia in Yemen after meeting Houthi leaders', The Guardian, 16 September 2026, https://www.theguardian.com/world/2026/sep/16/us-officials-decide-against-backing-saudi-arabia-yemen-meeting-houthi-leaders

transponders switched off, and independent data are lower and point to intermittent flows. In addition, since late September Iran has stepped up its attacks on shipping: the British UKMTO service recorded 32 attacks in the first three weeks of October, twice as many as in the whole of September.

The available transit data indicate that most departures are large crude carriers, known as VLCCs, operated largely by state-owned shipping companies from the Gulf countries or by shipowners willing to take on high risk. For crude, therefore, there have been episodes of partial recovery towards the levels seen before Hormuz was closed, albeit at the cost of unprecedented freight rates that substantially increase the delivered cost of each barrel and aggravate the energy crisis. Refined product tankers, which are smaller and carry less cargo per voyage, have less incentive to take on the risk and the cost of insurance, and everything suggests that they have benefited far less from the escorts[21]. Industry estimates, corroborated by Chris Wright himself, suggest that oil product flows are still at around 30% of pre-conflict levels[22].

In Ukraine, the outlook is no more encouraging. Trump has relaunched his diplomatic initiative: his envoys Steve Witkoff and Jared Kushner visited Moscow and Kyiv in early September in an unsuccessful attempt to convene a trilateral meeting. On 9 October, Donald Trump announced an agreement with Russia to temporarily allow the sale of up to 4.8 million tonnes of Russian diesel over six months through an easing of existing sanctions. Putin's 'concession' to Trump's demand seems to suit Russia particularly well, as it will now be able to sell its diesel on the international market without fear of international sanctions, and therefore at a higher price, precisely when its own demand for transport fuel is falling with the onset of winter[23].

Two days later, on 11 October, Trump announced a supposed 'energy truce' between Russia and Ukraine, which proved ineffective in less than 72 hours. In the run-up to the elections, the degree of improvisation shown by the US Administration in this crisis

[21] DIXON, Gary, 'Gulf product tanker volumes lag crude as owners remain risk-averse', TradeWinds, 13 October 2026, https://www.tradewindsnews.com/tankers/gulf-product-tanker-volumes-lag-crude-as-owners-remain-risk-averse/2-1-2058486

[22] 'US Energy Secretary: Oil Flows Through Hormuz Reach 80-90% of Pre-Conflict Levels', Asharq Al-Awsat, 12 October 2026.

[23] VAKULENKO, Sergey, 'How Will Trump and Putin's Diesel Deal Impact Russia and Global Markets?', Carnegie Endowment for International Peace, 13 October 2026, https://carnegieendowment.org/russia-eurasia/politika/2026/10/russia-usa-diesel-agreement

reveals how difficult it is to establish a coherent policy on the war in Ukraine and on the long-awaited peace that Trump is pursuing[24].

As regards the negotiations, Moscow has hardened its demands, which include Ukraine's withdrawal from the rest of the Donbas, the country's complete neutrality and limits on its armed forces, and has even ruled out the exchange of territory that was previously on the table. Kyiv and its European partners consider these conditions unacceptable[25]. The most likely outcome is a continuation of the conflict at varying levels of intensity, with possible intermittent ceasefires, in which Russian energy infrastructure would remain a priority target for Ukrainian strikes.

In this scenario, Ukraine's long-range strike capability is growing and will continue to do so. In July, a drone hit the Omsk refinery, some 2,500 kilometres from the border, and by the end of August only four large Russian refineries, located in Eastern Siberia, remained beyond Ukraine's reach. Drones are gaining range, precision and the ability to evade air defences, while Russia is unable to protect its vast and dispersed network of facilities. The market should not count on Russian diesel returning in the short term.

The new asymmetric warfare and critical infrastructure

The real story of the diesel crisis is not so much a shortage of crude as the vulnerability of the most rigid link in the chain: refining capacity.

Refineries are highly concentrated assets that are difficult to protect across their entire footprint and slow to repair, since many of their critical components, such as reactors, compressors and large transformers, are custom-built and have lead times that can run to months or even years. Economies of scale have meant that newly built refineries are increasingly large, often integrated into petrochemical complexes and linked to major logistics infrastructure, usually ports[26]. The result is the concentration of billions of euros of investment, and of a significant share of a country's or region's product supply, within a few square kilometres. Furthermore, their process configuration has easily identifiable

[24] CIARAMELLA, Eric, 'How Ukraine Can Turn Imminent Peril to Its Advantage', Foreign Affairs, 14 October 2026, https://www.foreignaffairs.com/ukraine/ukraine-can-turn-imminent-peril-its-advantage
[25] HARDING, Emily, 'What Is the Strategy in the Ukraine-Russia Peace Negotiations?', Center for Strategic and International Studies (CSIS), 24 November 2025, https://www.csis.org/analysis/what-strategy-ukraine-russia-peace-negotiations
[26] 'Rystad: Fewer refineries, greater capacity', Oil & Gas Journal, 12 August 2025, https://www.ogj.com/refining-processing/refining/capacities/article/55309276/rystad-fewer-refineries-greater-capacity

bottlenecks: the atmospheric distillation unit feeds all the others, and the loss of a key conversion unit, such as the catalytic cracker or the hydrocracker, can drastically reduce the output of middle distillates and gasoline, even if the rest of the plant remains operational.

This vulnerability has become exploitable thanks to the ability to strike energy infrastructure at long range and at very low cost, in what has been termed the 'new economics of war'[27]. Its defining feature is an inversion of the classic equation between offence and defence: offensive vectors are becoming ever cheaper relative to the interceptors designed to neutralise them. A long-range drone or missile costing tens of thousands of dollars can force the firing of defensive missiles costing hundreds of thousands or even millions, and it only takes a fraction of a swarm getting through the defences to put a distillation unit out of action for weeks.

This cost asymmetry is compounded by a revolution in access to information. Commercial satellite constellations offer high-resolution imagery at ever-increasing frequencies. Initially, the United States shared intelligence with Ukraine to plot routes and locate vulnerabilities in Russian refineries; Russia is reported to have provided the Houthis, via Iran[28], with satellite data on critical energy infrastructure; and nominally private Chinese satellite companies have supplied imagery to both the Houthis and Iran, earning them sanctions from Washington[29]. As the Iranian attacks on the Fujairah terminal have shown[30] (Figure 2), access to real-time satellite imagery makes it possible to increase the precision and sophistication of attacks, striking the most exposed and highest-value infrastructure. The commoditisation of satellite imagery has turned high-resolution geospatial data from a scarce, classified government resource into an abundant, low-cost commercial product accessible to middle powers and even militias.

[27] RIBAKOVA, Elina, 'Ukraine, Europe and the new economics of war', Bruegel, 8 December 2025, https://www.bruegel.org/opinion-piece/ukraine-europe-and-new-economics-war
[28] EL DEEB, Sarah, 'Russian satellites help Iran's allies strike Saudi Arabia, data and officials say', AP News, 27 October 2026.
[29] US Department of State, 'Disrupting Iran's Overseas Military Procurement Networks', 8 May 2026, https://www.state.gov/releases/office-of-the-spokesman/2026/05/disrupting-irans-overseas-military-procurement-networks
[30] 'Iran's precision strikes picked apart Gulf infrastructure, blunting US war plans', Reuters, 15 October 2026, https://www.reuters.com/investigates/special-report/iran-crisis-infrastructure-attacks/



Figure 2. Confirmed Iranian strikes on the Fujairah terminal, by type of asset hit
Source: author's own elaboration based on Reuters. Satellite imagery: Google. Positions are approximate.

The third element, and the one with the greatest transformative potential, is the integration of artificial intelligence throughout the offensive cycle. In the operational phase, Ukraine offers the clearest example. As early as 2024, its attacks on refineries relied on longer-range drones that used AI to navigate by terrain and resist jamming[31], without the need for satellite communication, and instead of hitting fuel tanks they targeted the distillation units where crude is processed, maximising downtime per successful strike[32]. Today, according to the Ukrainian Ministry of Defence itself, AI is integrated into its strike systems, enabling them to navigate without GPS, evade electronic warfare and identify the target in the final phase of flight, with foreign support included: the Pentagon funded the delivery of 33,000 AI guidance kits from the US company Auterion[33].

[31] BONDAR, Kateryna, 'Ukraine's Future Vision and Current Capabilities for Waging AI-Enabled Autonomous Warfare', Center for Strategic and International Studies (CSIS), 6 March 2025, https://www.csis.org/analysis/ukraines-future-vision-and-current-capabilities-waging-ai-enabled-autonomous-warfare
[32] HILL, Evan, 'How Ukraine uses precision drone strikes to hobble Russian oil refineries', The Washington Post, 11 October 2026, https://www.washingtonpost.com/investigations/interactive/2026/10/11/how-ukraine-uses-precision-drone-strikes-hobble-russian-oil-refineries/
[33] Auterion, 'Auterion and Skyfall to Ship 50,000 Shrike Strike Drones to Ukraine's Front Lines', press release, 13 July

In the industrial phase, the case of Yemen sets a precedent. According to Anthropic's September 2026 threat intelligence report, a cell in northern Yemen, presumably *Ansar Allah*, used the company's Claude Code tool in place of software engineers to develop the guidance, navigation and control system for three missile programmes, one of them with a target range of more than 2,000 km[34]. AI would thus appear to be acting as a catalyst for the adoption of increasingly complex offensive vectors, for the assembly of missiles and drones from dual-use civilian goods and for the real-time identification of targets, demonstrating its potential in asymmetric warfare.

Conclusions

The diesel crisis is a symptom of the new multipolar order, which is more fragmented, more unstable and more prone to conflict, at a time when the United States is stepping back from its role as guarantor of global security.

In this scenario, refining capacity, designed to maximise economic efficiency under the paradigm of globalisation, emerges as the most rigid link in the energy system in the face of a technological revolution that acts as a catalyst for asymmetric warfare and multiplies its effectiveness against critical infrastructure. The new economics of war rests on three mutually reinforcing pillars: offensive vectors that are increasingly cheaper than interceptors, access to near-real-time satellite information, and artificial intelligence that improves precision and lowers the technical barrier to manufacturing and operating weapons. In this new context, refineries are particularly vulnerable: they are large assets, concentrated in a few locations, visible from space, difficult to protect along their entire perimeter and slow to repair.

For security of supply, it is no longer enough to diversify crude sources or to maintain strategic reserves. Resilience requires rethinking the physical protection of assets, building redundancy into refining and storage, and fostering cooperation among allies to share defensive capabilities and intelligence. In this sense, the diesel crisis is the most visible symptom of a paradigm shift: energy security has become a direct variable of the

2026, https://auterion.com/auterion-and-skyfall-to-ship-50000-shrike-strike-drones-to-ukraines-front-lines/

[34] Anthropic, 'Threat Intelligence Report: September 2026', September 2026, https://www.anthropic.com/threat-intelligence-report-september-2026

new technological warfare.

*Ignacio Urbasos**
Associate Researcher in Global Affairs, University of Navarra