

POLAND

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From a Polish perspective, the key challenge is not the integration of the European defence market as such, but rather the ability of the domestic defence industry to participate in transnational supply chains, multinational project consortia, and the EU system of joint defence procurement². By contrast, the interests of a public arms purchaser focus on the ability to rapidly acquire armament, including through cooperation with partners outside the EU. The Polish position will therefore simultaneously seek greater openness of the EU market to equipment from the Member States that are not traditional leaders in defence production, while at the same time maintaining broad access to procurement from outside the EU.

Although the EU has expanded cooperation through initiatives such as the European Defence Fund and broader support for the European Defence Technological and Industrial Base (EDTIB), the practical outcomes remain uneven. One major criticism concerns unequal access to EDF resources, as larger and more established Western European defence industries often possess stronger institutional and financial advantages in obtaining funding. This creates concerns in Poland that smaller or newer member states face difficulties competing on equal terms³. From the Polish perspective, such imbalances may reinforce existing asymmetries rather than create a genuinely integrated defence market. Another important issue is the relatively slow pace of production within the European Defence Technological and Industrial Base. Limited production capacity and long delivery timelines reduce confidence in relying exclusively on European suppliers for urgent security needs⁴.

The revision of the Defence Procurement Directive could improve transparency and reduce market fragmentation, but Poland would likely support reforms only if they create more equal access to opportunities across member states. For example, the Directive could limit the use of excessively stringent requirements regarding prior experience in delivering similar pieces of armament, which often constitute a classic barrier to market entry.

Measures to reduce dependencies within supply chains should prioritise critical sectors such as ammunition, electronics, strategic materials, AI, quantum computing. Support for local

² MDLT supports the activity of the Polish defence industry in the European Defence Fund, Retrieved June 9, 2026, <https://www.gov.pl/web/development-technology>

³ Maślanka Ł., & Tarociński J. (2025), *Which Type of Armament Cooperation Do We Want/Need? The Case of Poland*, Retrieved June 9, 2026, from iris-france.org.

⁴ Paik W. (2024), *The Korean Defense Industry Enters the European Security Theater. An Analysis of Korea-Poland Arm Deals*, Retrieved on June 9, 2026, from irsem.fr.

production capacities and industrial resilience could reduce vulnerabilities during crises. However, the promotion of the EDTIB and joint procurement should avoid developing into a strict “European preference” principle⁵. The EU should rather enable European companies to produce raw materials, substances, and components that are currently unprofitable due to overly strict climate and environmental regulations. In this regard, difficult trade-offs will be necessary to enable faster development of critical manufacturing capacities within the EU, for example in ammunition production. The Defence Omnibus should be more ambitious, for instance by exempting steel, aluminium, and chemical producers supplying the defence sector from the ETS system or from additional certification requirements related to restrictions on hazardous substances.

The organisation of the defence market in the EU should encourage cooperation, technology transfer, and strategic partnerships while avoiding excessive industrial concentration. Large-scale consolidation may increase efficiency but could also reinforce the dominance of a limited number of major European defence firms. Poland has also a strong interest in ensuring that national defence industry and SMEs remain integrated into future industrial structures.

Proposals to limit the use of Article 346 TFEU are met with considerable caution⁶. The current framework provides member states with necessary flexibility to protect essential security interests, particularly in the field of defence procurement. Restricting its application could reduce national discretion in areas directly linked to sovereignty and strategic security requirements. There are also concerns that a narrower interpretation may create administrative burdens and limit the ability to respond effectively to changing security conditions. Any reform should avoid weakening member states’ capacity to safeguard their core defence interests.

⁵ Terlikowski M., Wróbel T. (2025), *Great Game of Interests*, Retrieved June 12, 2026, from polska-zbrojna.pl.

⁶ Raduła M. (2024), *Zamówienia publiczne a ochrona istotnych interesów bezpieczeństwa państwa – spotkanie efektywności ekonomicznej i rozwoju konkurencji z zapewnieniem bezpieczeństwa* In Kowalczyk B. (ed.), *Prawo administracyjne jako miejsce spotkań : księga jubileuszowa dedykowana Profesorowi Jerzemu Supernatowi (pp.339-345)*, Wrocław: Uniwersytet Wrocławski.