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Poland's Broken Defense Consensus

A financing dispute exposes the limits of cross-party alignment.

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Poland's security debate shifted dramatically when opposition-aligned President Karol [Nawrocki vetoed](#) the implementing legislation for the Security Action for Europe (SAFE) instrument.¹ The March 12, 2026 veto was the moment when a long-alleged cross-party consensus on defense policy reached its limits, exposed by the collision of electoral interests, institutional rivalry, and diverging visions of how and with whom Poland should rearm. This article addresses two questions: Why did a consensus that apparently held for nearly two decades fracture precisely at this moment, and what does the fracture mean for Poland's defense policy and its standing within NATO, the EU, and the region?

This analysis leads to three conclusions. First, the politicization of defense financing makes Poland's rearmament less predictable, comprehensive, and strategically legible to allies and industry. Second, Poland's cross-party defense consensus was real, but only at the level of threat perception and spending ambition. Beneath the shared commitment to spend more, two different governing logics had been quietly diverging for years: one treating NATO and the EU as complementary pillars of Polish security, and the other prioritizing the transatlantic relationship with the United States (and, only one step below, with NATO) over EU defense integration. Third, the government's "Plan B" to circumvent the veto and spend the SAFE money can limit immediate damage, but it cannot completely reproduce what was envisioned in the original implementation law: the best combination possible of cheaper financing, broader institutional coverage, and long-horizon industrial signaling.

The outcome of this contest over defense strategy could determine Poland's credibility within NATO and the EU.

Why SAFE Matters

President Nawrocki's veto was a high-stakes move. The European Commission had already endorsed a Polish defense investment loan worth more than €43 billion, with interest slightly above 3%. That is substantially [cheaper than any alternative borrowing channels available to Poland](#)², and is especially significant in a country whose fiscal position is [under heavy pressure](#)³ and that has committed to [spend 5% of GDP on defense](#).⁴ SAFE itself was adopted during Poland's 2025 presidency of the Council of the EU, which presented the instrument as a major success. Nawrocki's veto, presented as a defense of national sovereignty against Brussels' alleged control and German industrial steering⁵, made Poland the only EU member state in which SAFE became a source of domestic conflict—over sovereignty, debt, and the acceptable balance between EU and transatlantic defense policy.

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What is SAFE and How Does It Work?

The Security Action for Europe (SAFE) is a €150 billion EU defense loan instrument adopted by the Council of the EU in May 2025. It provides preferential loans to member states to co-finance defense procurement and industrial investment, with the objective of accelerating rearmament across the EU and deepening the European Defense Technological and Industrial Base.

Key financial terms: Loans carry a 45-year repayment period, a ten-year grace period on principal repayment—meaning borrowing states service only interest for the first decade—and an interest rate slightly above 3%, substantially below market borrowing costs for most member states.

Eligibility conditions: At least 65% of the contract value must be sourced from EU-established entities. Up to 35% may come from non-EU suppliers, including the United States, provided they meet security requirements. Eligible categories include ammunition, air and missile defense systems, unmanned systems and counter-UAS capabilities, ground platforms, critical infrastructure, cyber protection, and military mobility. The country must contract and implement the project early enough so that the final SAFE payment request can be submitted and approved before 31 December 2030; whether all equipment must be physically delivered by then depends on the contract and the tranche structure.

Poland's allocation: Poland submitted its national investment plan on November 29, 2025, covering 139 projects across the Ministry of National Defense and the Ministry of the Interior. The European Commission approved the plan on January 26, 2026, allocating €43.7 billion—the largest national share, representing approximately 29% of the total instrument.

Nawrocki's veto does not end Poland's participation in SAFE. The Tusk government [moved immediately to "Plan B"](#), routing SAFE loans through the existing Armed Forces Support Fund (FWSZ).⁶ The European Commission then confirmed it remains committed to Poland's approved plan. However, this workaround is narrower than the original model. Under this fallback route, no VAT exemption can apply, and this tax adds up to 23% to eligible acquisition costs.⁷ Moreover, the FWSZ is an instrument under the Minister of Defense and cannot channel funds to other ministries. This means that the PLN 7 billion (€1.65 billion) of the total SAFE sum that was originally earmarked for the Ministry of the Interior (the Police, the Border Guard, and State Protection Service—covering anti-drone systems, cyber protection, border security, and East Shield⁸ components) now falls outside SAFE's legal scope.⁹

The institutional context explains¹⁰ why this has become more than a routine legislative quarrel. In Poland's semi-presidential system, the government drafts and executes defense policy, but the president [can use his veto power](#) to block legislation unless the lower house of the parliament, the Sejm, overrides it by a three-fifths majority¹¹ (which currently the government does not have). The division of authority extends further: the Prime Minister initiates and drafts the National Security Strategy (NSS), but the president must formally approve it.

This matters because Poland is currently in "cohabitation", a situation in which the president and the parliamentary majority come from opposing political camps, with no shared governing mandate. The president holds enough formal authority to obstruct without governing: He cannot impose his own security policy, but he can block the government's. In practice, this means that if disagreements over financing, strategy, and alliance choices do not get resolved through normal political competition, they lead to gridlock. Legislation is vetoed,

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strategies go unsigned, and the government is forced into workarounds that are legally narrower, politically weaker, and strategically less legible to allies and industry.

A Consensus That Was Always Brittle

The SAFE crisis did not destroy a defense consensus in Poland; rather, it exposed one that had already grown brittle. The veto did not cause the fracture, but it made it impossible to ignore. The consensus was real in a narrow but important sense: Since at least 2007, Poland's main parties agreed that Russia was the principal threat, NATO was the indispensable security anchor, and that the United States was the primary partner. They agreed that defense spending had to rise substantially. That alignment held long enough to produce the 2022 Homeland Defense Act, which passed with near-unanimous parliamentary support.¹² The act enshrined a 3% GDP spending floor and established the FWSZ off-budget financing mechanism. Defense expenditure rose from 1.86% of GDP in 2014—the year in which NATO formalized the 2% commitment, following Russia's annexation of Crimea—to an estimated 4.48% in 2025, making Poland the alliance's highest spender as a share of GDP. On spending ambitions, the consensus was genuine.

What the different political parties never shared was the governing logic behind it.¹³ Poland affirmed the need for the armed forces modernization in the 2007 NSS¹⁴, during the early days of the Civic Platform governments (2007–2015). At the time, defense spending hovered around 1.9% of GDP and procurement remained sluggish, even though the strategy already flagged Russian assertiveness as a concern.

They differed not over Poland's need for modernization, but over the way that need was embedded in the country's broader security hierarchy. Under Civic Platform, Poland's approach was strongly Atlanticist. NATO remained the main multilateral security framework, while the United States was the key bilateral guarantor. According to this view, the EU was important politically and economically, but was not to be treated as the primary hard-security anchor.

The two Prawo i Sprawiedliwość (PiS, Law and Justice) governments (2015–2023) accelerated rearmament¹⁵, but also placed Washington even more firmly at the center of security strategy. They viewed EU defense integration with growing suspicion, in line with a broader Euroskeptic approach. The centrality of the United States became even more pronounced after the 2016 election of Donald Trump, whom PiS saw as an ideological ally. The government used this relationship to reinforce its own Atlanticist narrative and contrast it with the authority and credibility of Brussels.

SAFE makes that divergence precise. Nawrocki vetoed it not because he opposes rearmament, but because he sees it as a political instrument that sits at the intersection of four unresolved fault lines between the two (and now probably three, with the far-right Konfederacja entering the game) major parties: how rearmament should be financed; whether industrial contracts should flow to European or American suppliers; how far Poland should embed itself in EU regulatory frameworks; and how to balance sovereignty claims with alliance commitments.

The increasing politicization of defense policy is also manifest in the ongoing dispute over the new NSS. The Tusk government completed an updated version in 2025 to replace the previous document, which had been published in 2020—that is, before the 2022 Russian invasion in Ukraine.¹⁶ However, Nawrocki declined to sign it, [with his office objecting](#)¹⁷ to what it characterized as insufficient emphasis on the transatlantic relationship and an overweighting of EU integration. Nawrocki then commissioned a parallel version, a constitutional anomaly that effectively left Poland with the outdated 2020 strategy. Senior military officers have [publicly expressed unease](#) over the resulting inconsistencies in operational planning.¹⁸ The government can still act, but the

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absence of a formally adopted NSS makes harder to decide which security tasks—military, civil, industrial, or budgetary—should come first when coordinating across ministries and agencies.

The Right, The Far-Right, and the Politics of Selective Estrangement

With the 2027 parliamentary elections approaching, both the national-conservative PiS—[polling at historic lows of around 25%](#)¹⁹—and Konfederacja, a far-right libertarian-nationalist alliance, have strong incentives to view defense through an anti-EU, anti-German lens. The anti-German dimension has two distinct roots: historical grievances over wartime reparations, which PiS elevated into a campaign issue from 2022, and a structural suspicion—voiced regularly by PiS leader Jarosław Kaczyński—that the EU functions as a vehicle for German industrial and political dominance. SAFE fits neatly into that narrative: PiS can easily cast a Brussels-designed loan instrument with a European-content rule as placing Poland “under the German boot” or on an “EU leash.”²⁰

Neither party advocates formal EU exit, [as 82% of Poles support EU membership](#).²¹ The real risk is subtler. It is what might be called selective estrangement; that is, Poland would remain inside EU institutions while systematically blocking the instruments that give membership operational content in defense, procurement, and industrial policy. That would result in an Orbán-era Hungary scenario, and it would weaken not only Poland’s ability to shape European defense, but the credibility of European defense integration itself.

A Funding Mechanism Built Around Real Gaps and Threat Perception

The provisions under SAFE reflected Poland’s actual threat perception. In September 2025, Poland shot down drones that entered its airspace [during a Russian attack on Ukraine](#)²², underscoring how closely conventional and hybrid threats now interact on NATO’s eastern flank. When the Tusk government submitted Poland’s national SAFE investment plan to the European Commission in February 2026, it mapped the instrument explicitly onto those realities: East Shield fortifications²³, anti-drone systems, air defense, cyber protection, military mobility, and support for the police and border guard. SAFE was therefore not an abstract project originating in Brussels. For Poland, it was a mechanism designed to pay for capabilities the country urgently needs and the Tusk government proudly framed it as a victory during Poland’s EU presidency in 2025.²⁴

The Industrial Logic Matters Just as Much

Poland’s defense industry, dominated by the state-owned Polish Armaments Group (PGZ), has historically relied on licensed production and legacy maintenance.²⁵ The current national rearmament wave is a transformation opportunity, but Poland lacks the domestic industrial output to supply demand and must borrow to fund rearmament at the required pace. SAFE’s eligible categories map directly onto Poland’s stated priorities as outlined in the Armed Forces Development Programme (2025–2039).²⁶ Poland’s rearmament strategy combines two imperatives that do not perfectly coincide. The first is speed, or rapid procurement from abroad, especially from the United States and South Korea, to improve readiness. The second is autonomy—a longer-term effort to deepen domestic and European production capacity, reducing dependence on external suppliers whose reliability cannot be taken for granted.

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Conclusion and Recommendations

The SAFE veto did not create Poland's defense consensus problem; it simply revealed its limits. Across parties, broad agreement remains on the centrality of the Russian threat, the need for capable armed forces, and the United States' centrality. What probably never existed was a stable cross-party settlement on how rearmament should be financed, how far it should be embedded in EU industrial instruments, and how the presidency and government should manage cohabitation in security defense policy. The veto made that gap impossible to ignore and imposed four concrete costs simultaneously.

The first is legal: Routing SAFE through Plan B creates a narrower, legally fragile framework that may face constitutional challenge and excludes PLN 7 billion in Interior Ministry projects from the outset. The second is industrial: Poland championed SAFE during its EU presidency and secured the largest national allocation. Treating its domestic implementation as a sovereignty dispute sends a contradictory message to Polish and European industry alike, and makes Warsaw look less predictable inside the architecture it helped build. The third is transatlantic and practical: SAFE loans' lower cost means the instrument would free fiscal space for additional extra-European procurement as well. By vetoing it, Warsaw risks deepening dependence on Washington at precisely the moment when US commitment to European security is most uncertain. The fourth is regional. For the Baltic states, the concern is not Poland's current capability but its future reliability. The cohabitation paralysis may delay crucial and coordinated decisions precisely when speed is essential.

The paradox of the "sovereignty" argument is now fully visible. The right rejected SAFE on the grounds that a Brussels-designed instrument gives the EU leverage over Polish defense choices. Yet the logical alternative is a deeper bilateral dependence on Washington, a guarantor whose commitment to Eastern Europe is, at this moment, more uncertain and potentially more conditional than any EU loan mechanism. Sovereignty is not strengthened by trading a manageable European dependence for an unpredictable transatlantic one.

Four Actions Can Limit the Damage

First, the Polish government should consider publishing the full list of Plan B-funded projects, broken down by region, company, and capability, showing the concrete evidence of Polish industrial benefit. Second, the government should establish a standing cross-party Defense-Industrial Council, bringing together representatives of the government, the opposition, the armed forces, and industry, with a formal mandate to review and co-endorse the long-term investment plan, monitor contract implementation, and publish regular progress reports. A cross-party council creates continuity, makes obstruction attributable, and sends a clear signal to allies that Poland's defense planning is not conditional on who wins the Polish parliamentary elections in 2027.

Warsaw and Brussels jointly should anchor as many SAFE projects as possible in EU-level frameworks²⁷, making their implementation more difficult to reverse if adversarial parties win the elections, and more predictable to allies.

NATO members and EU partners should engage Poland bilaterally on specific projects, making Polish industrial participation in European defense a concrete economic interest. Allies should also make clear, publicly and diplomatically, that Poland's reliability as a partner—not only its spending level—is the measure by which its contribution to collective defense will be judged. A Poland that spends more than any NATO ally as a share of GDP but cannot translate that spending into coherent, predictable policy is a less credible deterrent than a smaller, more unified actor. Credibility in Brussels and among Baltic allies has direct consequences for Poland's ability to shape the European defense architecture it helped build. That architecture is also what gives Poland

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strategic depth beyond its bilateral relationship with Washington.

Nawrocki has pledged to obstruct the Tusk government until the 2027 parliamentary elections, and the tools available to him are more than adequate to slow the institutional anchoring that defense policy requires. And 2027 offers no guaranteed resolution. If PiS returns to power, the cohabitation paralysis ends but the underlying contest over EU defense integration, transatlantic dependence, and SAFE resumes under different terms. The more plausible near-term scenario is therefore managed damage control and deferral of the deeper question of Poland's strategic coherence. The costs of this deferral will only accumulate.

The views expressed herein are those solely of the author(s). GMF as an institution does not take positions.

Endnotes

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