Palantir: the Lord of AI Defense

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Have you ever heard of Palantir? It is one of the most influential companies in the Western AI-defense ecosystem, while maintaining much lower public visibility compared to giants like Nvidia, Meta, or Amazon. Behind its name, there is already a program: the *Palantíri* of J.R.R. Tolkien, the seeing stones used to observe and control from afar. In the imaginary world, Sauron uses them to manipulate his servants. In the real world, Palantir wants to be the seeing stone of the West's data.

The company was founded in 2003 in Silicon Valley, in the midst of the post-9/11 “war on terror.” The idea of Peter Thiel, billionaire co-founder of PayPal, and Alex Karp, philosopher turned manager, is simple and radical: use algorithms similar to financial anti-fraud ones to find terrorists and criminal networks within enormous amounts of government data. In 2004, In-Q-Tel, the CIA's venture capital fund, invests, opening the doors of American intelligence to Palantir.

In those years, between Iraq and Afghanistan, the **Gotham** software is used to map insurgent networks, identify improvised explosive devices, cross-reference patrol reports, satellite images,

and military databases. The product works: where teams of analysts and weeks of work were once needed, now a platform aggregates everything and shows relationships, patterns, targets. It is Palantir's first step towards becoming the software infrastructure of Western security.

But war is not the only horizon. The same ability to unite scattered and incompatible data fascinates banks, industries, and civil governments. Thus, other pillars are born: **Foundry** for businesses and healthcare, **Apollo** to distribute updates everywhere – from the cloud to military bunkers –, and **AIP**, the Artificial Intelligence Platform that connects generative AI models to clients' real data. Palantir doesn't just sell software: it sells a way of looking at and governing the world through data.

Palantir: how software decides wars

From the battlefield to hospitals: global expansion (with Nvidia in the background)

Technologically, Palantir presents itself as a layer that overlays existing IT: it does not ask to rebuild everything from scratch, but connects old ministerial databases, 1960s mainframes, modern data lakes, and real-time streams, transforming them into a single large digital “map.” On this ontology, AI models come into play, estimating risk, suggesting actions, simulating scenarios.

- With **Gotham**, military commands can integrate field intelligence, drone logs, satellite images, and police information, up to systems like **TITAN**, a tactical node that uses AI to shorten the time between identification and engagement of a target.

- With **Foundry**, factories, banks, and hospitals create a “digital twin” of the organization: production lines, suppliers, patients, financial assets become connected objects on which to build applications for demand, predictive maintenance, logistics, clinical analysis.
- **Apollo** is the DevOps glue that allows the same tools to be deployed both on a public cloud and in an ultra-secure data center or on a field laptop in a theater of war.
- **AIP** connects real data to generative AI models and intelligent agents, keeping together permissions, data masking, logs, and audits.

Palantir: how software decides wars

The turning point comes with the strategic alliance with **Nvidia**. Palantir structures the data and flows; Nvidia provides GPUs, frameworks like CUDA-X, and models like *Nemotron*. The declared goal is to transform Palantir into the **standard for “AI-defined” logistics and manufacturing**: routes, prices, and stocks are recalculated in near real-time based on demand, weather, production constraints, geopolitical tensions.

This combination of software “brain” and hardware “muscle” boosts the stock market and makes Palantir a pure-play bet on AI in government and industrial sectors. Meanwhile, the company moves out of the military niche and into healthcare and public services:

- **During the pandemic**, Palantir systems were used in the USA to track infections, hospital beds, and vaccine logistics.
- In the United Kingdom, Palantir won the mega-contract for the **Federated Data Platform of NHS England**, designed to unify clinical and management data and intervene on waiting

lists and resource allocation.

- In Europe, various ministries and police forces experiment with Gotham and Foundry for counter-terrorism, investigative analysis, and management of large government databases.

On the corporate front, names like **BP**, **United Airlines**, major retailers, and food groups use Foundry to orchestrate global supply chains, reduce waste, anticipate failures and bottlenecks. The promise is always the same: transform scattered data into a unique operational dashboard, where AI and decision-makers work side by side.

Palantir: how software decides wars

Surveillance, democracy, and data sovereignty: the real price to pay

The more Palantir grows, the more shadows increase. In the United States, the use of Gotham by the immigration agency **ICE** to integrate visa, movement, social, and biometric data in planning raids and deportations fuels accusations of **mass surveillance** against migrants and vulnerable communities. In the United Kingdom, the centralization of NHS health data on a platform managed by a company with military roots sparks protests from associations and NGOs, concerned about possible secondary uses of the data and the informational power concentrated in a foreign private entity.

In war theaters – from Ukraine to the Middle East – the use of Gotham and AIP is linked to the construction of **increasingly automated targeting chains**, in contexts already marked by accusations of international law violations. Human rights activists fear a race to algorithmic

armament where responsibility and traceability of decisions become increasingly opaque.

On the political front, Palantir embodies the new **techno-military complex**. Peter Thiel, an influential investor in the new American right, and Alex Karp, CEO with a philosophical background but very tough positions on security and foreign policy, have built a company that works closely with armies, intelligence, and governments. Karp has openly defined Palantir's products as “weapons” and compared the impact of military AI to that of the atomic bomb in reshaping power on the battlefield.

In Europe, where the name Palantir recurs when talking about defense, intelligence, and health or fiscal data, the issue is data **sovereignty**. Among contracts with NATO, projects with national governments, and ambitions in the industry, the risk is that an American private infrastructure becomes the **de facto operating system** for entire European public functions. Italy, for now, has more limited governmental involvement, but some large industrial groups are already experimenting with Foundry for supply chain and digital transformation: as a NATO country and key ally in the Mediterranean, it is likely that in the coming years the dialogue with Palantir on defense and cyber-security will intensify.

The temptation for governments and companies is strong: reduce investigation times from weeks to hours, cut logistical waste, anticipate failures, predict threats in a world marked by hybrid wars, health crises, and fragile supply chains. But the potential price is a **shift in the center of gravity of democracies** towards governance dominated by opaque platforms, difficult to audit and often beyond the reach of parliamentary or judicial control.

The real question, especially for countries like Italy, is not just whether to accept or reject Palantir, but **under what conditions**: with what transparency rules, what obligations for independent audits, what technological alternatives – perhaps European – and how much capacity to say “no” when a digital seeing stone risks becoming, from a tool, a permanent architecture of power.

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