

Palantir quietly makes massive AI war play

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Palantir's (PLTR) hot streak just got a brand new tailwind.

The stock has been a standout performer this year, surging to new all-time highs as investors continue to salivate over AI infrastructure winners. The momentum has been fueled by a combination of real-world deployments and growing use cases across the defense and enterprise stacks.

At the same time, Palantir's potent government engine continues widening its lead.

Agencies have been flocking to its robust platforms to fuse data, speed up decision-making, and tighten networks. Similarly, commercial players are following an identical playbook, leaning hard on AI to bump productivity while taming costs at the same time.

And now, a new signature adds some serious muscle to Palantir's head-turning government segment.

On Oct. 27, Palantir executed a major defense AI pact, one with major long-term implications for its broader AI war footing, which is likely to become a massive on-ramp to Palantir's next leg higher.



Palantir CEO Alex Karp and Poland's Defense Minister Włodysław Kosiniak-Kamysz sign a letter of intent to expand cooperation in AI and cybersecurity. Image source: Morris/Bloomberg via Getty Images

Palantir's Poland pact plants another flag in Europe's defense AI

Poland just put Palantir on speed dial.

On Oct. 27, Defense Minister Włodysław Kosiniak-Kamysz and CEO Alex Karp signed a **letter of intent** in Warsaw to effectively strengthen their cooperation across data integration, AI, and cybersecurity. Naturally, the development adds another layer to Palantir's already-illustrious growth story on NATO's eastern flank.

The agreement is essentially an LOI at this point, which tees up workstreams and procurement pathways with Poland's Ministry of National Defense. This news follows a separate PGZ-Anduril collaboration on cruise missiles, highlighting Warsaw's broader modernization push in defense.

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It's also worth noting that Poland is among NATO's largest spenders relative to its GDP, planning to **allocate nearly 4.8% to 5% of its GDP** to defense.

For Palantir, the government has been the critical growth engine. For instance, in Q2 2025:

- **Total revenue:\$1.004 billion (up 48% year over year)**
- **Government revenue:\$553 million (up 49% year over year)**, forming 55% of the total

Why Poland agreement is significant for Palantir

The powerful new defense pact throws greater weight behind Palantir's growing European footprint, following NATO's adoption of its Maven Smart System.

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