Issue Brief

Big Tech in Taiwan

Beyond Semiconductors

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Executive Summary

Several U.S. technology companies have embedded themselves in Taiwan's economy by building data centers, opening R&D facilities, and contracting with Taiwanese manufacturing partners, even as China's pressure on the island has intensified. Their footprints in Taiwan raise the question of how corporate assets and personnel might shape U.S. technology companies' decision-making in a potential contingency.

This study traces the economic and operational linkages of 17 U.S. technology companies—firms that supported Ukraine after Russia's 2022 invasion—to Taiwan, and examines how their entanglements with the island might impact their behavior in a future crisis.[*] Business calculations are only one factor in board-room decision-making, as reputation, public pressure, and corporate values also matter. That said, mapping the assets at stake helps illuminate the incentives and risks these companies would have to weigh if conflict erupts in the Taiwan Strait.

While many, if not all, of the companies rely to some extent on Taiwan-made semiconductors, mapping their vulnerabilities to chip supply chain disruptions is beyond the scope of this report.

Drawing on data on greenfield foreign direct investment (FDI), research and development (R&D) centers, data centers, supply chains, revenue, and job postings, this report finds that, of the companies that do business in China and Taiwan, the majority maintain more robust ties to the former. However, a number have enduring linkages to the island that could motivate them to intercede in some way:

- **Google, Apple, Microsoft, and Amazon have deeper ties to Taiwan than the remaining 13 companies.**
    - **Google** appears to have the most extensive footprint in Taiwan of all the companies analyzed in this report. Its FDI expenditures are the highest, and it maintains a data center and hardware-focused R&D facilities on the island. Though the extent to which Google relies on Taiwan for producing electronics is unclear, it has partnered with several local hardware manufacturers. The company appears to have the largest Taiwan-based labor force of any of the companies, as proxied by media

[*] The companies are: Amazon, Apple, Capella Space, Cisco, Clearview AI, Cloudflare, Fortem Technologies, Google, Maxar, Microsoft, Oracle, Palantir, Planet Labs, Primer, Recorded Future, SpaceX, and Tesla. Mandiant was acquired by Google in 2022, after the invasion.

reports and job postings. It is the only company of the 17 covered in this paper that appears to have a more robust presence in Taiwan than in China.

- **Apple** maintains a robust manufacturing presence in Taiwan, as around a quarter of its suppliers have at least one facility that produces components there. It maintains an R&D presence on the island and is reportedly developing a local data center.
- **Microsoft** recently operationalized a data center in Taiwan and maintains R&D operations on the island. Around a third of its top 100 suppliers are headquartered in Taiwan or are subsidiaries of Taiwan-headquartered companies.
- **Amazon** recently opened a data center in Taiwan and conducts some R&D on the island. A small percentage of its manufacturing partners are based there.

Although many companies are attempting to de-risk from China, most maintain stronger ties to the mainland than to Taiwan. Their dependence on China may make the decision to aid Taiwan more difficult than the decision to help Ukraine in the aftermath of Russia's full-scale invasion. The companies, however, would be forced to navigate complex relationships with both the Chinese and Taiwanese governments in a crisis that could put their physical assets and employees at risk.

Finally, despite intensifying geopolitical risks, some of these companies have expanded their presence in Taiwan in recent years. These investments reflect strategic decisions to access Taiwan's innovation and production capabilities, but they also come with liabilities. While exposure to supply chain shocks and semiconductor dependence are the most acute hazards, the overall risk to these companies from Taiwan-based operations remains limited compared to that from their more extensive entanglements in China.

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Introduction

After Russia's full-scale invasion of Ukraine in February 2022, at least 18 private and public U.S. technology companies (see Figure 1) provided aid, mostly pro bono, to the Ukrainian government. These companies helped Kyiv access intelligence, surveillance, and reconnaissance (ISR) capabilities, safeguard government data, and defend critical infrastructure, among other functions.[1] Their contributions were critical to supporting Ukraine in the early stages of the conflict.

Figure 1. Logos of the 18 Companies That Provided Aid to Ukraine

Given the growing role of advanced technology in conflict and the private sector's involvement in Ukraine, policymakers have begun to consider what roles corporations may play in a future conflict with China over Taiwan. Previous CSET research has examined this issue in part. In "Which Ties Will Bind?," CSET analyzed the 18 U.S. tech companies' footprints in Russia (before the full-scale invasion) and compared them to their potential exposure to Chinese coercion in the event of a future conflict.[2] That paper found that Tesla, Apple, Microsoft, and Amazon appear highly vulnerable to Chinese coercion, while Google, Cloudflare, Cisco, and Oracle are also vulnerable, but to a lesser degree.[3] China would also be negatively impacted should these companies withdraw from the Chinese market, as many Chinese workers produce goods for them, either directly or through third-party suppliers.

While U.S. tech companies' entanglements with China are well known, there has been comparatively little research exploring the activities of these companies in Taiwan. Through an examination of their greenfield foreign direct investment (FDI), supply chains, data centers, research and development (R&D) operations, revenue, and employees in Taiwan, this paper fills this research gap by mapping these companies' activities on the island.[4] It provides a high-level comparison of their footprints in China, with an eye toward

understanding the factors on both sides of the Strait that might influence how these companies respond to a potential Taiwan contingency.

Much of the rhetoric surrounding de-risking deals with decreasing reliance on China. Largely missing from the conversation are the connections companies maintain or are building with Taiwan, which provides a different sort of risk and opportunity for them, and for the U.S. government. That said, geopolitical frictions among Beijing, Taipei, and Washington are also motivating companies to relocate supply chains and human capital away from Taiwan, including some Taiwanese firms.[5]

Even amid these rising tensions, some U.S. technology companies are further embedding themselves in Taiwan's economy, especially with regard to research operations and data centers. Their expansions make good business sense; Taiwan is a thriving digital economy with world-class electronics manufacturing and semiconductor businesses, as well as a tech-savvy workforce. But these U.S. companies might have to contend with the risk of Chinese coercive or kinetic actions in the years ahead. Given that most of them maintain more robust ties to China than Taiwan, which are detailed in the aforementioned 2024 CSET report, the extent to which they would support the island in a contingency is unclear.[6]

This report provides background on the roles the aforementioned technology companies played in supporting Ukraine against Russia before delving into case studies of their individual footprints in Taiwan. The final section provides key takeaways and analyzes how each company's Taiwan footprint could affect its decision-making in a cross-Strait crisis.

Methodology

This report is a follow-up to the 2024 CSET paper "Which Ties Will Bind?," which examined the ways in which U.S. technology companies that assisted in the initial defense of Ukraine were entangled with China.[*] That report identified 18 U.S. technology companies that contributed to Ukraine's war effort, either by providing direct support on the battlefield or by offering services to protect critical infrastructure and sustain government operations.[7] This paper examines the same companies' footprints in Taiwan (Google acquired Mandiant in late 2022, so this report covers 17 companies). While this paper focuses on companies that have demonstrated their willingness to act in the context of geopolitical conflicts, as evidenced by their actions in the Russia-Ukraine war, others may play a role in a future Taiwan conflict but are beyond the scope of this paper.

This report largely follows the same methodology as its predecessor, but a few differences merit mention. First, there is limited information about these companies' respective revenues in Taiwan: several companies are private and thus do not share revenue information publicly; the larger, public companies do not publish Taiwan-specific revenue information; and several companies appear not to do business in Taiwan. Second, this paper does not include information on companies' venture capital or private equity investments in Taiwan.

That said, this report leverages the *Financial Times*' fDi Markets dataset to determine corporate greenfield FDI into Taiwan, the number of projects and the number of R&D-related investments of each company on the island, as well as extensive open-source research to determine Taiwan-based supply chains, data centers (throughout this report, the term data center also refers to cloud computing infrastructure), and employees.[†] Because of data limitations and questions surrounding the representativeness of available data, the snapshots of each company's activities in Taiwan are likely incomplete.

Still, this combination of indicators provides a useful lens through which to view evolving U.S. corporate entanglements with Taiwan. Greenfield FDI investments, as well as the presence of supply chains, data centers, and R&D centers, indicate a

[*] Throughout the report, unless otherwise noted, the term "China" refers to mainland China, which does not include Taiwan, Hong Kong, or Macao.

[†] Some projects mentioned in the paper do not appear in fDi Markets, but the author supplements the dataset with open-source information, especially regarding planned and recently operationalized data centers.

company's long-term interest in doing business in a particular country or region. That said, economic, research, and supply chain entanglements are just some of the factors that would ultimately shape how companies might act in a future Taiwan contingency. Other factors include public opinion, corporate moral and political alignment with Taiwan, and perhaps dependence on Taiwan-manufactured advanced semiconductors, among others. Table 1 lays out the proxy data gathered to measure U.S. companies' linkages to, or footprints in, Taiwan.[8]

Table 1. Indicators for U.S. Companies' Economic and Financial Linkages to and Presence in Taiwan

Indicator	Function	Data Source
Greenfield foreign direct investment (FDI)	Measures investors' long-term interest and production of goods and services in a foreign country or region	*Financial Times'* fDi Markets (January 2003–December 2024)
Research and development centers	Measures the frequency of investment in and value of new R&D facilities in a country or region	*Financial Times'* fDi Markets (January 2003–December 2024)
Data centers*	Measures a company's offerings of data processing, hosting, and other data-related and cloud services in a country or region	*Financial Times'* fDi Markets (January 2003–December 2024) and various open sources as indicated in company case studies
Supply chains	Measures U.S. companies' supplier networks in a country or region	Corporate supplier lists and open-source research
Revenue†	Measures a company's proportion of sales in a country or region	Open-source research and company 10-Ks
Employees	Measures the number of company personnel or job postings in a country or region	Open-source research

* Due to the difficulty of quantifying the number of data centers companies have in specific regions, the terms "data center" and "data center location" are used interchangeably throughout this report. For example, Amazon has three availability zones in Taiwan, but the report treats them as one data center/data center location.

† None of the companies published Taiwan-specific revenue data, but the report features other regional revenue-related information.

Setting the Scene

Several U.S. technology companies contributed cutting-edge capabilities that helped Ukraine withstand and later repel Russia's initial full-scale invasion in early 2022. Some supplied cybersecurity and data management services, while others provided satellite-enabled communications and targeting assistance.[9] In a few cases, these companies even delivered capabilities that the U.S. government would not have been able to supply.[10]

While it is difficult to discern exactly why each of the companies came to Ukraine's defense, there are likely a few factors that motivated their participation in the conflict. Some likely aimed to protect a democratic country against an authoritarian aggressor, while others probably believed that aiding Kyiv could lead to business opportunities; most of the companies had a mix of motivations. Moreover, several companies decided to support Ukraine because of pro-Ukraine public sentiment in many parts of the world.[11] Whatever their reasons, the companies' decisions to help Ukraine were enabled by the fact that none of them depended on Russia for revenue, supply chains, or R&D. As such, any damage to their Russia-based businesses was not a dealbreaker for their aiding Ukraine.

The companies could play a similarly impactful role in the event of a Taiwan contingency. Given Beijing's extensive offensive cyber operations and advanced capabilities, some of the aforementioned companies could assist Taipei with cyber defense and protect critical infrastructure to maintain government functions. Others could provide the Taiwanese government with satellite-enabled communications and help with targeting, both of which would be useful amid a kinetic conflict. Some of these companies are already investing in hardening the island's defenses. Cisco, Microsoft, and Google, for example, are to varying degrees assisting Taiwan in improving its cybersecurity capabilities, with Cisco establishing a dedicated cybersecurity center on the island.[12] The companies are also likely interested in protecting their own Taiwan-based physical assets and employees.

However, many of the companies that aided Ukraine's war effort have extensive footprints in China. Several companies, including Apple and Tesla, manufacture a large proportion of their products there, and others also maintain robust supply chains in the country.[13] Microsoft and Amazon conduct computer science and AI research at their mainland labs.[14] These and other companies have extensive operations and employees in China, and vulnerabilities stemming from these ties could influence corporate decision-making in a Taiwan conflict.

Concerns over U.S. corporate ties to China are already impacting Taiwan's defense strategy. The Taiwanese government has reportedly elected to avoid contracting with SpaceX for its Starlink satellite internet services because of owner Elon Musk's extensive links to China.[15] Instead, Taipei struck a deal with Eutelsat to access the European company's OneWeb network and is now reportedly in talks with Amazon's Project Kuiper for satellite internet.[16] That the Taiwanese government is already making decisions about the companies with which it would want to partner in a crisis speaks to the need for deeper analysis of other companies that could aid the island in a conflict.

Taiwan is the world's foremost producer of leading-edge semiconductors, home to many globally competitive electronics manufacturers, and a technology R&D hub. Moreover, it is a potential flashpoint where corporate presence intersects with geopolitical risk. While this report does not analyze the U.S. companies' dependence on Taiwan for advanced semiconductors, the interruption of their ability to access the island's chips constitutes a significant strategic vulnerability. This paper, however, focuses on the companies' Taiwan-based physical assets and personnel.

The following case studies examine the linkages between Taiwan and each of the aforementioned companies to discern where corporate entanglements are most and least pronounced.

Case Studies

The footprints of the companies CSET analyzed in its previous report on China are largely significantly lighter in Taiwan (details in Table 2). Capella Space, Clearview AI, Fortem Technologies, Maxar, Planet Labs, Primer, Recorded Future, and SpaceX have few, if any, discernible ties to Taiwan. Cisco, Tesla, Cloudflare, Oracle, and Palantir have light footprints, so they are discussed in one section below. The majority of the following analysis covers Google, Apple, Microsoft, and Amazon, which maintain relatively robust ties to the island.

Table 2: Select U.S. Companies' Greenfield FDI Expenditures, FDI Projects, R&D Investments, Data Centers, Supplier Networks, and Job Postings in Taiwan

	Greenfield FDI Expenditures[17]	FDI Projects[18]	R&D Investments[19]	Data Centers[20]	Suppliers (in Taiwan/Total)[21]	Total Job Postings[22]
Google	$1.39 billion	12	6	Yes	Unknown*	195
Apple	$394 million	3	2	No (1 Planned)	48/187	29
Microsoft	$281 million	15	9	Yes	Unknown†	11
Amazon	$261 million	3	2	Yes	41/2,296	68

* The author was unable to find detailed information on Google's supply chain, presumably because the company does not release this information.

† Open-source research indicates that around a third of the companies on Microsoft's FY24 "Top 100 Production Suppliers" list are headquartered in Taiwan or are subsidiaries of Taiwan-headquartered firms.

Google

Google's activities in Taiwan reveal that the island has become an important hardware innovation hub for the company. Google operates a data center in Taiwan—the first of these U.S. companies to do so—and runs R&D centers there. Moreover, it advertises the most local jobs of any of the companies analyzed in this paper.

In 2024, the Asia-Pacific region accounted for just over 16 percent of Google's total revenue, but the company likely made only a small fraction of that in Taiwan.[23] Google has wound down some of its presence in China over the past few years; it no longer conducts AI-related research in the country and discontinued its development of a China-specific search engine.[24]

At the same time, the company has boosted its presence in Taiwan, investing an estimated $1.39 billion in greenfield FDI across 12 projects since 2003 (this is a small quantity given the company has invested over $100 billion in FDI globally).[25*] Google has also invested in four undersea cables that connect Taiwan with the global internet, though these fall beyond the scope of this report.[26]

Google's growth in Taiwan has been fueled by investments in data center infrastructure. The company set up a data center in Changhua County in 2013 through a $600 million investment.[27] The company has also established a Google Cloud Region—a geographic area where it provides services and infrastructure for running applications—in Taiwan.[28] In 2019, Google announced that it would construct a second data center in Tainan, and, in 2020, shared its intent to build a third such facility in Douliu.[29] It is reportedly still assessing its plans for the Tainan project, and there are no signs that the Douliu facility is under construction.[30] It is unclear why the company has not operationalized these projects, and Google's data center website notes that it only operates the facility in Changhua County.[31]

Beyond its data center, Google has also expanded its R&D operations on the island in recent years. According to fDi Markets, Google has made six R&D-related investments in Taiwan. While its early R&D investments focused on software and IT services, some of its more recent transactions have been aimed at hardware. In 2024, for example, the company opened its second hardware R&D office in New Taipei City.[32] In doubling down on R&D in Taiwan, Google Vice President for Hardware Elmer Peng noted that the island has become the company's largest "hardware R&D hub outside of the U.S."[33]

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[*] These figures include an estimated $380 million for data centers in Tainan and Douliu, Taiwan, which do not appear to be in operation.

He added that Taiwan's workforce and hardware supplier ecosystem make it ideal for developing devices, including Pixel phones and tablets.[34]

Though there are few details about Google's international supply chains, the company appears to work with a number of Taiwanese suppliers that produce products for the company on the island and elsewhere.[35] Moreover, Peng noted in 2024 that Google currently has "thousands" of employees from over 30 countries on the island.[36] He also stated that the company has "increased 20-fold" its Taiwan-based workforce over the past 10 years.[37] The company was advertising for nearly 200 Taiwan-based job openings, many of which were for engineering roles, in June 2025.[38]

Apple

Apple's investments in Taiwan show that the island has become an important hardware production and R&D base. The company conducts R&D there and partners with numerous local suppliers, and it is reportedly planning to construct a data center on the island, which would be one of only a handful of such Apple facilities.

Apple's ties to China are well known. While around 17 percent of Apple's FY 2024 revenue came from "Greater China," (China, Hong Kong, and Taiwan), the majority of its revenue was from the mainland; Apple only operated two official stores in Taiwan as of June 2025.[39] The company has made an estimated $394 million in greenfield FDI across three projects, most of which went to funding a plant for electronics manufacturing.[40]

Apple has established a robust supply chain and network of manufacturing partners across Taiwan. According to Apple's 2023 supplier list, 48 of its suppliers, or just over a quarter of the total, produce goods for the company on the island.[41] Apple appears to be increasing its production footprint in Taiwan, as its 2022 supplier list indicated that it had only 41 suppliers in Taiwan.[42]

But that is not the only supply chain story. Many of Apple's suppliers produce goods in China but are headquartered in Taiwan. Foxconn, Pegatron, and Wistron Corporation, for example, are Taiwanese companies whose China-based factories play a large role in Apple's supply chain. While a conflict would likely disrupt Taiwan-based manufacturing, Taiwan-headquartered companies operating in China could face additional difficulties because of coercive actions from the Chinese government.

Outside of supply chains, Apple has invested in two R&D projects in Taiwan, the first in 2013 and the second in 2015, according to fDi Markets. The first facility focuses on

iPhone-related R&D and the second on display technologies.[43] The company has also reportedly partnered with Taiwan Semiconductor Manufacturing Co. (TSMC) to create advanced displays on the island.[44]

While not confirmed, Apple is reportedly building a data center in Taiwan, which would be its first on the island and third in Asia.[45] This would be a significant investment, as Apple, unlike Google, Microsoft, and Amazon, does not have a large global data center presence. As of June 2025, the company operated 10 data centers, only four of which were located outside of the United States.[46]

It is unclear how many employees Apple has in Taiwan, and its website listed 29 local job openings as of June 2025.[47]

Microsoft

Microsoft's activities in Taiwan indicate that the company values the island not only for its electronics and semiconductor manufacturing capabilities, but also for its burgeoning software ecosystem. Taiwan appears to play a significant role in Microsoft's supply chain. Moreover, the company recently opened a local data center, and it has established several R&D centers on the island over the past several years.

Microsoft does not publish region-by-region revenue figures, but it has invested an estimated $281 million in greenfield FDI across 15 projects in Taiwan since 2003, a small fraction of its global FDI expenditures.[48] Microsoft's data center and R&D investments are key to its expansion in Taiwan. In 2020, the company announced that it would establish a data center region on the island, which is reportedly now operational and will serve government agencies, as well as healthcare and financial services companies.[49]

In addition to these activities, Microsoft has invested in nine R&D-related projects in Taiwan. Since 2003, the company has invested in Internet-of-Things (IoT), cloud computing, and AI-related projects, among others. For example, Microsoft Research Asia, the company's research arm on the continent, invested an estimated $15.9 million in a cloud computing R&D project in Hsinchu in 2009, according to fDi Markets. Seven years later, Microsoft established an IoT Innovation Center.[50] And in 2018, it launched an AI research hub, through which it aimed to collaborate with the Ministry of Economic Affairs (MOEA), the Ministry of Science and Technology (MOST), and the Ministry of Education (MOE).[51] The company also maintains its Startup Accelerator and IoT Center of Excellence in Taiwan.[52] It is unclear what role these facilities play in Microsoft's broader R&D ecosystem.

Unlike Apple and Amazon, which provide fairly granular information on their suppliers' locations, Microsoft publishes a yearly list of its "Top 100 Production Suppliers" based on each fiscal year's "spend for commercially available hardware products."[53] Open-source research suggests that around a third of the companies on Microsoft's FY24 production suppliers list are either headquartered in Taiwan or are subsidiaries of Taiwan-headquartered companies.[54] It is difficult to discern Microsoft's supply chain vulnerabilities, because the company does not include information on where its suppliers manufacture products, though many suppliers likely produce goods for Microsoft in China and Taiwan.

Furthermore, it is unclear how many Microsoft employees are currently based in Taiwan. The AI R&D center was slated to have 200 researchers by 2023, but it is unclear how many Microsoft personnel work there.[55] The company notes that its data center in Taiwan will have "48 full-time employees and contractors" by the end of 2026.[56] As of June 2025, it was advertising for only a handful of Taiwan-based positions.[57]

Amazon

Compared with Google, Apple, and Microsoft, Amazon has maintained a relatively small footprint in Taiwan. That said, the company has established a local R&D presence, and it recently operationalized a data center in Taiwan, thereby increasing its footprint on the island.

Amazon has injected an estimated $261 million in FDI into the island across three projects since 2003. The largest project was the establishment of an AWS edge computing location in 2014. Amazon does not break down its revenue by region.[58]

Over the past several years, Amazon has set up more and more computing infrastructure in Taiwan, including AWS Direct Connect locations in 2018, AWS Outposts in 2020, and AWS Local Zones in 2022.[59] In 2024, Amazon announced that it would invest billions of dollars in Taiwan-based cloud computing infrastructure.[60] The company pledged to launch a cloud infrastructure region in Taiwan in 2025.[61] Amazon launched its Taiwan data center in June 2025.[62]

On top of this, Amazon has made two R&D investments in Taiwan, including a facility that is reportedly jointly operated with the New Taipei City government and another firm, as well as an innovation center where it reportedly aims to work with local startups.[63] In 2018, former Taiwanese Minister of Science and Technology Chen Liang-gee said that Amazon would set up an AI research center in Taiwan, but there are no

indications that this project is up and running.[64] The company has not provided any additional information about the project.

Several Taiwan-based companies manufacture products for Amazon. According to the company's 2024 supplier list, there are 41 Taiwan-based suppliers involved in producing Amazon-branded products, down from 46 in 2023.[65] However, Amazon lists 2,296 total suppliers, meaning that Taiwan-based companies make up only 1.8 percent of its total supplier ecosystem.[66]

It is unclear how many Amazon employees work in Taiwan, but the company was advertising 68 openings for positions related to software, hardware, operations, and supply chains as of June 2025.[67]

Companies with Lighter Footprints in Taiwan

Cisco

Cisco maintains a relatively limited footprint in Taiwan, but it has expanded its presence there over the past few years. It has injected an estimated $118 million in FDI into the island across four projects since 2003. Two of these projects were announced in 2023 and 2024, respectively.

All four of Cisco's FDI projects were R&D-related, and they span cloud computing, software, and cybersecurity. For example, in 2024, Cisco announced the establishment of a local cybersecurity center aimed at improving the island's "threat intelligence and cyber readiness."[68]

As of June 2025, Cisco was advertising for a modest number of job openings in Taiwan.[69]

Tesla

Tesla's light footprint in Taiwan indicates that the island is not a strategic focus for the company. Though its island-specific revenue is not publicly available and the company has not injected FDI there, Tesla maintains a handful of stores and service centers in Taiwan, including in Taipei, New Taipei City, Taichung, and Tainan (some of these stores and service centers are co-located).[70] As of June 2025, it had also set up around 40 charging stations throughout the island.[71]

Tesla does not appear to have R&D or data centers in Taiwan. Moreover, it does not manufacture products there, as, unlike Apple and Amazon, which rely on third-party

suppliers, Tesla constructs and manages its own manufacturing facilities, none of which are located on the island. Tesla does, however, source components from Taiwan, and it has reportedly instructed its Taiwan-based suppliers to relocate production away from the island.[72]

The total number of Tesla employees in Taiwan is unclear, but most of the public job advertisements in June 2025 were for vehicle service technicians and sales and customer support representatives.[73]

Cloudflare

Cloudflare has made a single FDI investment into Taiwan since 2003, worth an estimated $154 million. This investment was aimed at setting up the company's data center in Taipei. According to its website, Cloudflare also maintains a data center in Kaohsiung.[74] The company does not advertise for Taiwan-based positions.[75] It does, however, appear to collaborate with local companies on cybersecurity efforts.[76]

Oracle

Oracle has not made any FDI investments in Taiwan since 2003, according to fDi Markets, and the company does not appear to have Taiwan-based data or R&D centers.[77] That said, as of June 2025, it was advertising for over a dozen jobs, including for engineers and sales consultants, on the island.[78]

Palantir

Palantir appears to maintain an office in Taiwan, but there is no other publicly available information about its activities there.[79]

Main Takeaways

Despite intensifying geopolitical tensions, some U.S. technology companies are maintaining, or even expanding, their footprints in Taiwan. In many ways, the companies are simply acting in their business interests, as the island boasts a dynamic digital economy, renowned semiconductor and hardware manufacturing companies, and a tech-savvy workforce.

Generally, however, these companies maintain smaller footprints in Taiwan than in China, at least with respect to greenfield FDI, supply chains, data centers, R&D centers, and revenue. Still, these connections with Taiwan could influence their decision-making in a conflict and, should the companies become targets, harm their respective businesses not only on the island but also globally.

Some companies' relationships with Taiwanese manufacturers could leave them exposed to supply chain disruptions. As discussed above, Apple and Microsoft, and to a lesser extent Amazon, rely to some degree on Taiwanese suppliers, which operate in Taiwan, China, and elsewhere, for the manufacturing and assembly of their products. While information on the other companies' supply chains is not publicly available, some of them likely rely on Taiwanese suppliers as well.* A conflict over the island would disrupt local production, but it could also impede Taiwan-headquartered suppliers' operations in China. The companies would be adversely affected by the impacts a conflict might have on Taiwan's advanced semiconductor production industry, but analysis of those implications is beyond the scope of this paper.

Several companies could also suffer adverse impacts on R&D in a conflict over Taiwan. Google, Apple, Microsoft, Amazon, and Cisco all appear to conduct R&D on the island. It is difficult to determine the relative value of each company's Taiwan-based R&D efforts, but Google may be especially dependent on its local R&D operations, as evidenced by Elmer Peng's statement that the island has become its second-largest hardware R&D hub.[80] Apple also conducts hardware R&D in Taiwan, but it is unclear how significant those operations are to its overall business, as the company performs R&D in various countries across Asia and Europe, as well as in the United States.[81] Microsoft and Amazon also do some R&D in Taiwan, but these efforts appear to be less important than those they conduct in China (see "Which Ties Will Bind?" for analysis of Microsoft and Amazon's China-based R&D efforts).[82] Finally, all

* Other companies likely depend on Taiwanese suppliers to some extent, but additional data on their manufacturing activities is not publicly available, so the analysis focuses on the companies that share information on their suppliers.

of Cisco's greenfield FDI in Taiwan went toward R&D projects, but it is difficult to map the extent of the company's R&D activities, thus complicating a comparison of its local and global R&D efforts.

Taiwan-based greenfield FDI and data centers do not constitute high-level risks for these companies, as they each make up a small percentage of U.S. tech companies' global totals. Google's FDI expenditures in Taiwan—the largest among these U.S. tech companies—make up only around 1 percent of its global total.[83] Google, Microsoft, and Amazon each operate data centers in Taiwan, and Apple is reportedly building a data center there. Although U.S. big tech companies appear interested in setting up such infrastructure, these facilities would constitute a very small share of each company's global footprint (As of June 2025, Amazon had 259 data centers, Microsoft had 80, and Google had 35).[84] Apple, however, has only 10 data centers worldwide, so a new facility in Taiwan would increase its exposure to harm from a cross-Strait conflict to a greater, though still manageable, degree.[85]

Despite growing concerns about Taiwan's future viability as a production, research, and commercial hub, a few U.S. companies have recently grown their footprints on the island. Google expanded R&D operations on the island in 2024, while Microsoft and Amazon recently launched data centers there. And three of Cisco's four total FDI projects in Taiwan occurred during or after 2021, according to fDi Markets.

While not all five of these companies (Google, Apple, Microsoft, Amazon, and Cisco) have expanded their operations in Taiwan in recent years, they maintain some ties to the island across the range of indicators outlined above. Google, Apple, Microsoft, and Amazon are among the world's most valuable companies, and they may be able to better tolerate the risk of exposure to Chinese coercion or aggression than other firms, despite the fact that they still depend on China in various ways.[86] Moreover, these companies have specific interests in key sectors of Taiwan's economy, such as hardware R&D and production, that make it an attractive place to do business despite the intensifying risks.

Observers should not automatically construe U.S. companies' ongoing ties to Taiwan as strategic missteps or indications that they would support Taiwan in a contingency. Should China invade Taiwan, there is no guarantee that they would back the island in the same ways they supported Ukraine after Russia's full-scale invasion. Their entanglements reveal that the island, which has long been an important player in semiconductors, electronics manufacturing, and technology R&D, is becoming an increasingly significant software market. In short, companies are doing business in Taiwan because there are practical reasons to continue doing so.

Moreover, the limited Taiwan footprints of the aforementioned companies do not constitute significant risks outside of their reliance on local supply chains for electronics manufacturing and advanced semiconductors. Therefore, it appears as though the upside of growing their still somewhat limited footprints in Taiwan, outside of supply chains, outweighs the potential downside a contingency would create.

Projecting how corporate entanglements in certain countries impact companies' decision-making is difficult, if not impossible. That said, a comparative analysis of these U.S. technology companies' ties to China and Taiwan may be instructive in understanding their regional operations and vulnerabilities. Despite some evidence of corporate de-risking from China, prominent U.S. tech companies including Amazon, Apple, Microsoft, Cloudflare, Oracle, Cisco, and Tesla all maintain stronger ties to China than Taiwan across the indicators analyzed in this paper. Google, however, which has made a point of winding down some of its China-based operations, appears to be the one major U.S. technology company in this study that has more robust ties with Taiwan than China as proxied by greenfield FDI, data centers, R&D centers, and job postings.[87]

Conclusion

This paper analyzes 17 U.S. technology companies' ties to Taiwan to provide insights into how corporate linkages with the island may impact their decision-making in a cross-Strait conflict. While the majority of companies are more deeply entangled with China than Taiwan, Google stands out as the one U.S. big tech company that appears to have a more robust relationship with the island than the mainland.

This paper also finds that, despite increasing geopolitical risks associated with doing business in Taiwan, some U.S. technology companies have expanded their activities on the island over the past several years, including through establishing R&D centers and constructing data centers. Should these companies become targets in a potential China-Taiwan conflict, their businesses could suffer. That said, none of these companies have grown their activities on the island to the extent that a conflict would pose an existential risk. The most significant impacts these companies would likely face in the event of a Taiwan contingency are disruptions to their electronics manufacturing supply chains and, though beyond the scope of this report, the loss of access to Taiwan-made semiconductors.

Deeper ties between U.S. tech companies and Taiwan could push these companies to help defend Taiwan in a conflict scenario. But any actions they consider would need to be balanced against the threat of Chinese interference in their mainland operations.

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