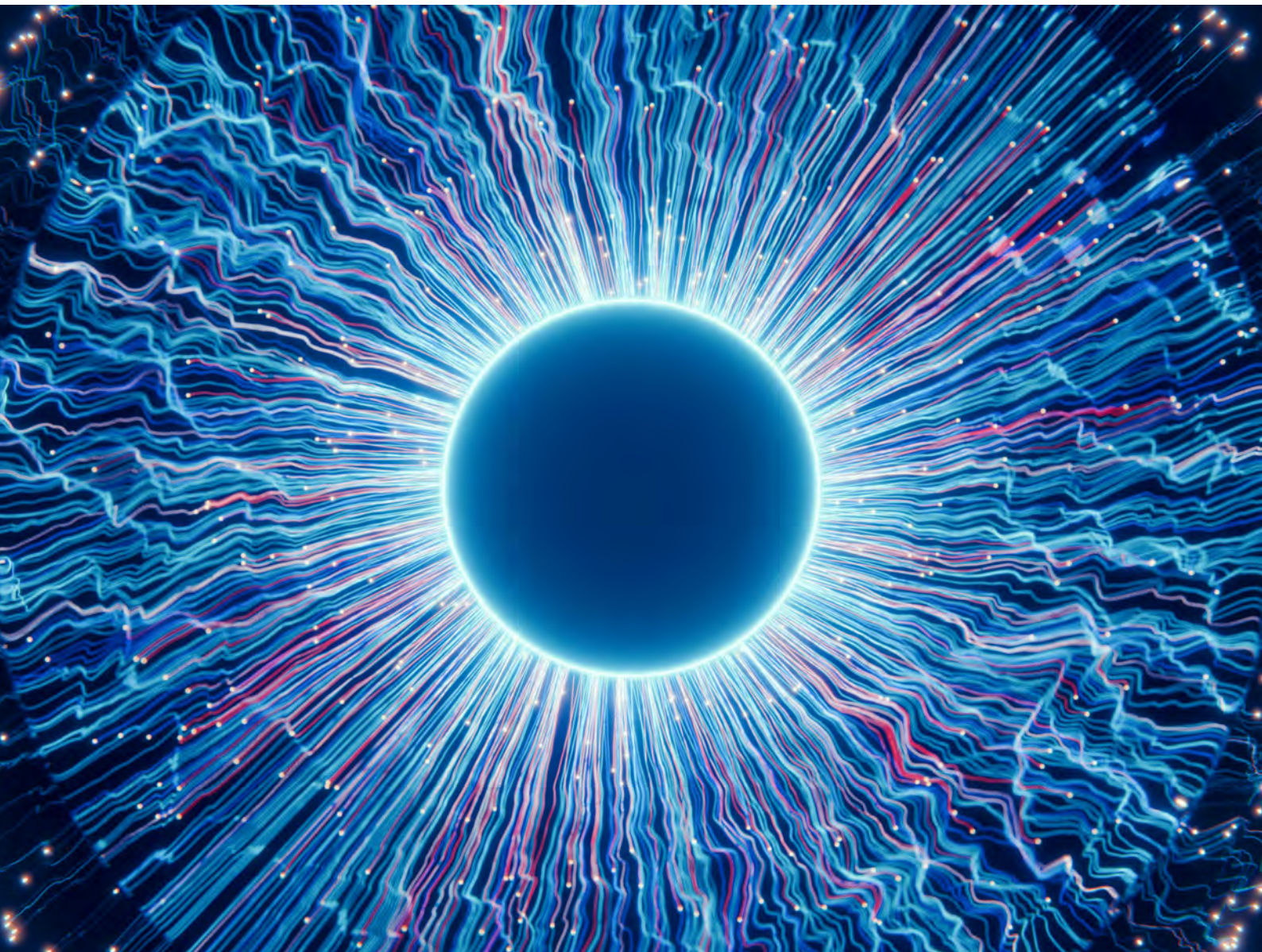
Netherlands Enterprise Agency

Taiwan's AI Ecosystem



Preface

Dear Readers,

Technology is rapidly reshaping our world. What was once confined to specialized research environments is now embedded in our daily lives, from the devices we use to the systems that underpin our cities and economies. In this context, artificial intelligence (AI) is emerging as a key driver of transformation.

While Taiwan is globally recognized as a leader in hardware and semiconductor manufacturing, this position is evolving. This study explores how Taiwan is building on its industrial strength to play a central role in the development and application of AI, including in the context of the“AI City” vision.

This report was commissioned by the Netherlands Innovation Network of the Netherlands Office Taipei (NLOT) and carried out by the Taiwan Artificial Intelligence Foundation (AIF). It contributes to the broader mission of fostering international cooperation between companies, research institutes, and public authorities in support of the Dutch government's international knowledge and innovation agenda. By examining initiatives such as Taiwan's Ten Major Infrastructure Projects, as well as the role of leading companies in enabling global data centers, the report provides insight into emerging direction and opportunities.

At its core, this report highlights the growing collaboration between the Netherlands and Taiwan in the field of AI. This partnership brings together Taiwan's strengths in advanced manufacturing and digital infrastructure with Dutch expertise in innovation and application-driven solutions. It also reflects a shared commitment to ensuring that technological progress goes hand in hand with ethical considerations.

We hope this report offers valuable insights for policymakers, researchers and industry leaders, and supports continued collaboration towards a more innovative, connected, and responsible digital future.

Kind regards,

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財團法人人工智慧科技基金會
Artificial Intelligence Foundation

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The Global AI Industry Landscape and the Next Wave of Applications

To understand how the rules of competition in the AI industry are shifting, one must first grasp its fundamental division of labour.

The AI industry can be broken down into four layers. At the base is the **hardware layer**, responsible for producing the chips and servers that power AI computation. World's most valued company NVIDIA designs GPUs. The hardware layer is also the core competence for Taiwan. For example Taiwan Semiconductor Manufacturing Company (TSMC) commands both advanced process nodes and advanced packaging technologies such as CoWoS (Chip-on-Wafer-on-Substrate), giving it a market share approaching 100% in logic chips for AI data centres. Also Taiwan-based Original Design Manufacturers (ODMs)—Quanta, Wistron, Foxconn, and Inventec—assemble these chips into server systems. Together, Taiwan accounts for roughly 90% of the global AI server market, effectively setting the ceiling for global AI compute supply. This concentration means that for any company building AI infrastructure—including those in the Netherlands—Taiwan is an unavoidable part of the supply chain.

The next layer up is the **cloud layer**. Providers such as Amazon Web Services (AWS), Microsoft Azure, and Google Cloud aggregate servers in data centres and offer computing power on a rental basis. Most enterprises do not build their own facilities; instead, they lease compute capacity from these platforms. The cloud layer controls customer relationships and usage data, and largely determines the cost of accessing AI services.

Above that sits the **model layer**. Companies such as OpenAI, Google, and Anthropic use massive compute resources to train foundation models—giving machines the ability to understand language and generate content. Models serve as the core engine of AI applications, but their training costs are extremely high; only a handful of organisations can sustain continued investment at this scale.

At the top is the **application layer**: the user-facing tools that package model capabilities into products solving specific problems—from code assistance (e.g. GitHub Copilot) and image generation (e.g. Midjourney) to vertical industry solutions.

Each of these four layers has distinct cost structures, barriers to entry, and revenue models. AI software—spanning foundation models, APIs, and end-user applications—sits across the top two layers: the model layer and the application layer. Understanding this architecture is essential for appreciating the competitive shifts discussed below: the battleground is extending downward from the model layer into cloud and hardware, and upward into applications and real-world deployment.

Key Shifts in the Global AI Landscape

The decisive factor in AI competition is changing. Performance gaps among frontier models are narrowing rapidly, and as model capabilities converge, the competitive focus is shifting from“who has the stronger model” to“who can embed AI into workflows and keep it running reliably.” In practice, the gap between a successful proof-of-concept and stable production is wider than most enterprises expect—rooted not in model capability, but in operational maturity. As AI enters high-risk domains, governance is shifting from a nice-to-have to a market-entry requirement.

At the infrastructure level, capital expenditure is scaling to a point where only a handful of players can keep pace. This is driving hyperscale cloud providers to vertically integrate chip design, data centres, and service interfaces into a single pipeline—centralising both cost structures and supply reliability. For organisations outside this inner circle, dependency on a small number of infrastructure providers is becoming a structural risk.

The next wave of AI value compounds these pressures. Ageing populations, care-worker shortages, and efficiency demands on public services are pushing AI into physical environments—healthcare facilities, factory floors, and city infrastructure. When AI operates in these settings, the relevant questions extend beyond output accuracy to physical safety, data privacy, and liability attribution. Governance is not just a compliance checkbox; it is a precondition for deployment at scale.

These dynamics together define the institutional challenge that Taiwan's government has been responding to, and form the backdrop for the enterprise cases examined in Chapter 3.

Ch 2

Taiwan's Government Policy: The AI New Ten Major Infrastructure Projects and Governance Legislation

This chapter examines how Taiwan's government has designed its institutional response, focusing on three dimensions: how policy instruments build the enabling conditions for compute, adoption, and platform readiness; how governance principles are translated from a framework act into auditable institutional requirements; and where enterprises continue to face implementation gaps in strategy, data, and accountability. Whether these three dimensions can align will determine whether the institutional framework can be converted into scalable deployment capacity.

2.1 AI New Ten Major Infrastructure Projects: Building"Enabling Conditions" Through Policy Instruments

In August 2025, the Executive Yuan[1] (Taiwan) announced Taiwan's AI New Ten Major Infrastructure Projects, organised across three pillars—Smart Applications, Key Technologies, and Digital Foundations—with a planned investment exceeding NTD 100 billion (approximately USD 3.1 billion) and a target horizon extending to 2040. The design aims not merely to expand the scale of compute, but to construct the enabling conditions for enterprise adoption and long-term operation.

Compute and Infrastructure

The NCHC Cloud Computing Centre was inaugurated in December 2025 at the Southern Taiwan Science Park (STSP) in Tainan, equipped with 15 MW of power capacity and large-scale AI/HPC compute resources, with plans to expand to 23 MW by 2029. The National Centre for High-performance Computing (NCHC) has also partnered with Japan's NTT and Chunghwa Telecom to deploy IOWN All-Photonics Network technology, targeting low-energy, high-speed data transmission. Concurrently, the Taiwan Compute Alliance was established in the same period, bringing together AMD, NVIDIA, Foxconn, and other enterprises to focus on compute-resource matching and open-source software promotion—addressing the hardware prerequisites of compute sovereignty and energy-efficiency optimisation. That said, the ultimate effectiveness will depend on enterprise-level integration capabilities and the maturity of application scenarios. How these infrastructure investments translate into deployable systems is examined through the enterprise cases in Chapter 3.

Adoption Capability and Talent Development

On the enterprise adoption side, the Industrial Development Administration (IDA), Ministry of Economic Affairs (MOEA) functions as the government's implementation arm—deploying advisory teams, subsidies, and training mechanisms to accelerate AI uptake among SMEs and manufacturers. As of March 2026, IDA's AI Digital Transformation programme had assisted 2,058 enterprises in adopting AI, of which 91% were SMEs, with a stated goal of 140,000 enterprise visits over two years. For companies with deeper upgrading needs, R&D Transformation Support subsidies of up to NT$40 million per industry alliance project are available; cumulative subsidies had reached NT$900 million across at least 197 enterprises. On the talent side, the AI Application Planner Certification (iPAS) had seen over 21,000 participants and 8,464 certified individuals, with approximately 4,800 enterprises actively prioritising certified hires.

In essence, this programme addresses two parallel challenges: the enterprise adoption gap and the talent pipeline gap. Its effectiveness, however, will ultimately depend on the state of data readiness and governance maturity within enterprises themselves.

1 The highest administrative authority in Taiwan, equivalent to a cabinet or council of ministers. Responsible for policy implementation across all government ministries.

Governance Framework and Data Standards

On the governance side, Taiwan has adopted a three-layer AI governance structure. At the top, the Artificial Intelligence Basic Act establishes national principles and assigns the National Science and Technology Council (NSTC) as the central competent authority. In the middle, the Ministry of Digital Affairs (MODA)[2] leads the development of an AI Risk Classification Framework, providing risk-based guidance across sectors. At the base, sectoral competent authorities—covering healthcare, finance, transportation, and other domains—are expected to translate this framework into domain-specific rules and technical requirements.

Alongside this governance architecture, Taiwan is building out its sovereign AI infrastructure. The Taiwan Sovereign AI Training Corpus—a cross-ministerial initiative to convert government data into high-quality AI training material—had reached over 1.2 billion tokens by early April 2026, strengthening domestic models'understanding of Taiwan's language, legal system, and social context. The critical challenge going forward remains converting governance principles into enforceable audit standards, and embedding data-governance rules into enterprise workflows—both of which await further implementing regulations and industry practice.

The strategic logic underpinning this policy framework resonates with the Netherlands'current AI development trajectory. For the Netherlands, the prevailing argument is that Europe should not attempt to outscale the United States or China, but should instead focus on“strategic control points”—deep domain expertise, trustworthy infrastructure, scientific strength, and defensible data pipelines. Taiwan's Sovereign AI direction, the energy-efficiency planning of the NCHC compute centre, and the emphasis on vertical applications all echo this logic of competing not on scale, but on control points.

2 Established in 2022, MODA oversees Taiwan's digital governance, cybersecurity, and data policy. Under the AI Fundamental Act, it is charged with advancing the risk-classification framework and data-governance mechanisms.

2.2 The Artificial Intelligence Fundamental Act: From Principled Declaration to Institutional Requirements

The Artificial Intelligence Basic Act was passed by the Legislative Yuan[3] on 23 December 2025, establishing Taiwan's national AI governance framework. NSTC[4] is designated as the central competent authority and serves as the secretariat for the National Artificial Intelligence Strategy Special Committee—the statutory body responsible for coordinating national AI affairs and supervising policy implementation across ministries. All levels of government are required to adapt related regulations within three years of implementation.

The Act organises seven governance principles across three tiers: human values (sustainable development, well-being, and human autonomy); technical safeguards (privacy and data governance, cybersecurity and safety, transparency and explainability); and social accountability (fairness and non-discrimination, and accountability). The institutional logic runs in sequence—baseline values first, then technical safeguards, then auditable liability—reflecting a framework designed to be invoked progressively as AI deployment matures.

Notably, Taiwan's approach diverges from the EU's high-penalty regulatory model. Instead, it pursues a soft law approach, using budgets, fiscal incentives, and regulatory sandboxes to steer development while preserving room for technological iteration. The trade-off is that without mandatory audits, governance risks remaining at the level of box-ticking compliance. Whether supplementary measures can convert these principles into auditable operational requirements—and give enterprises both the incentive and the capacity to internalise them—remains the central implementation question.

3 Taiwan's unicameral national legislature, responsible for passing laws, approving budgets, and overseeing the executive branch.

4 Taiwan's central government body for science, technology, and innovation policy. Designated as the competent authority under the Artificial Intelligence Fundamental Act (2025).

Ch 3

Taiwan's AI Deployment Pathway: Enterprise-Driven Supply Chain and Real-World Integration

Taiwan's AI development pathway differs markedly from that of most countries. Through the AI New Ten Major Infrastructure Projects, the government has erected three pillars—spanning hardware foundations, industry adoption, and public digital infrastructure—and in December 2025, passed the Artificial Intelligence Fundamental Act to establish governance principles.

Yet when policy meets implementation, the real work falls to enterprises—those with products, customers, and operational track records on the ground. From semiconductor manufacturing to end-user delivery, Taiwanese enterprises have progressively formed a relatively complete AI supply chain.

This supply chain was not centrally planned by the government; rather, it emerged as enterprises each found their position through global market competition. This“practice first, division of labour second” formation gives the enterprise sector a more pragmatic understanding of technology deployment: when the government articulates policy directions such as governance frameworks or Sovereign AI—the ability to control data, models, and compute within national governance—enterprises are better positioned to translate policy language into tangible, deliverable system solutions, because they already have customers, operational sites, and maintenance experience in hand.

That said, the backbone of this supply chain is formed by established enterprises (often expanding their ICT capabilities), not startups.

The Taiwan AI Startup Map 2025 shows that Taiwanese AI startups are concentrated primarily in enterprise workflow optimization tools (such as Robotic Process Automation) and various vertical-domain applications; many teams have been incubated by or work in deep collaboration with large corporations. In contrast to the United States, where startups drive model innovation, or China, where platform conglomerates orchestrate entire ecosystems, Taiwan follows a different trajectory: established enterprises integrate AI into existing products and services, then leverage supply-chain relationships to reach international markets.

This“enterprise-driven” model offers several practical advantages.

First, these enterprises already possess customers, operational sites, and long-term maintenance experience, making it easier to convert technology into contractually deliverable systems rather than leaving it stranded in laboratories. Second, Taiwanese companies have collaborated within global supply chains for years; the integration foundation from chips to end devices already exists, and AI is simply layered onto established partnerships without the need to rebuild trust from scratch. Third, Taiwanese enterprises have faced global markets from the outset, incorporating international specifications and cross-border requirements into product and service design from day one—rather than discovering at the export stage that specifications are misaligned and everything must be reworked.

The following sections examine representative enterprise cases to illustrate concretely how this chain operates.

3.1 TSMC: The Pivot of AI Compute

Propelled by the AI wave, Taiwan Semiconductor Manufacturing Company (TSMC) has long outgrown its role as a manufacturer that simply"produces chips." It is the most upstream and most irreplaceable player in the global AI supply chain. Whether it is NVIDIA's GPUs, AMD's processors, or the custom AI accelerators designed in-house by Microsoft, Amazon, Google, and Meta, the vast majority ultimately rely on TSMC's advanced process nodes to reach mass-production scale.

This"unbypassable" position stems from three structural advantages: leadership in advanced process nodes, a complementary advanced-packaging ecosystem, and continually expanding capital investment—making TSMC the starting point and pivot of the global AI supply chain.

AI Reshaping the Semi Landscape

The revenue mix reveals how AI demand is redrawing the industry map. High-Performance Computing (HPC) has become TSMC's largest revenue platform, accounting for 51% of total revenue in 2024, with AI accelerator revenue growing more than threefold. This signals that the value centre of the semiconductor industry is tilting rapidly toward AI and data centres, driving technology, capacity, and customer resources to concentrate further among the few suppliers capable of handling advanced nodes.

Within this trend, TSMC commands a market share approaching 100% in logic semiconductors for AI data centres, and holds 71% of the overall foundry market, leaving competitors with virtually no foothold. Behind this high concentration lie multiple barriers—technology thresholds, capital expenditure (CAPEX), and ecosystem trust—that make it extremely difficult for rivals to replicate comparable scale and stability in the near term, even if they possess a manufacturing base.

Advanced Process & Packaging Moat

On the technology front, advanced process nodes remain the most critical moat. The 3-nanometre node contributed approximately 20% of wafer sales revenue in its second year of mass production; the N2 node is expected to enter volume production in the second half of 2025, with A16 scheduled to follow from 2026.

At the same time, AI chip complexity continues to escalate, elevating packaging from a"back-end process" to a decisive factor in performance and delivery capability. TSMC's"Foundry 2.0" concept integrates packaging, testing, and mask manufacturing into its overall service offering, pushing the competitive frontier beyond standalone wafer fabrication toward system-level integration services.

CAPEX as a Structural Barrier

In the semiconductor industry, capital expenditure is the clearest barometer of competitive dynamics because it determines not just factory expansion but also the pace of node advancement, yield ramp-up, supply-chain leverage, and customer-trust accumulation over the next two to three years.

Taking Intel—TSMC's principal competitor—as a benchmark: TSMC's planned CAPEX for 2025 centres on approximately USD 40 billion, while Intel's is estimated at roughly USD 14.6 billion, a relative five-year low.

The CAPEX gap does more than produce different capacity scales; it means the leader can repeatedly widen the distance in node progression, yield improvement, supply-chain coordination, and customer-trust accumulation—creating a structural barrier that is extremely difficult for competitors to cross.

From Manufacturing to Ecosystem

No matter how advanced the chips are, they are only the starting point of an AI system. Moving from chips to data-centre system delivery, governance-framework establishment, energy and grid support, and end-domain adoption and maintenance still requires mid-stream and downstream enterprises—along with supporting policies—to complete the relay.

Consequently, the competitiveness of Taiwan's AI supply chain will not be determined solely by upstream manufacturing leadership. What matters more is whether system integrators, end-device manufacturers, and policy frameworks can connect manufacturing advantages to real-world domains—turning them into AI systems that operate in factories, hospitals, and city governance. Taiwan's answer to this question is not a single company but a layered ecosystem: each of the enterprises discussed in the following sections occupies a distinct position in that chain, from server assembly and power infrastructure to sovereign cloud platforms and global field deployment.

BOX: TSMC – Key Operating Metrics (2024–2025)

	2024 (Annual Report)	2025 (Preliminary / Investor Conference)
Revenue	NT$2,894.31 billion	USD revenue up 35.9% YoY
Paid-in Capital	NT$259.27 billion	Based on 2024 year-end level (2025 annual report not yet published)
Employees	83,825	85,134 (as of February 2025)

3.2 Quanta: Scaling AI Systems

If TSMC is the upstream engine of the AI supply chain, Quanta Computer is best understood as the mid-stream integrator that assembles chips and components into AI server systems and supplies them to cloud clients at manufacturing scale. From NVIDIA GPUs to the AI servers physically running inside the data centres of Microsoft, Amazon, Google, and Meta, the critical—and most bottleneck-prone—segment of system integration, thermal design, and volume manufacturing is precisely the core competency Quanta has built over decades.

Founded in 1988 and originally renowned as a notebook-computer Original Design Manufacturer (ODM), Quanta has in recent years completed a transformation from PC contract manufacturing to AI infrastructure. Taiwan-based manufacturers collectively hold roughly 90% of the global AI server market, and Quanta is one of the core players in this Taiwanese cohort. By 2024, its server business accounted for close to and surpassed half of total revenue, becoming the company's operational mainstay and confirming its inflection point from PC ODM to AI infrastructure supplier.

Full-Rack Systems Engineering

Quanta's value in the AI supply chain lies not in any single component but in systems engineering: integrating the motherboards, power supplies, networking, mechanical structures, and thermal subsystems required for high-density GPU computing, and rapidly ramping volume production to customer specifications on schedule. Generative-AI training and inference demand extremely high compute density, making thermal management one of the key thresholds for design and volume supply.

Through its Quanta Cloud Technology (QCT) product line, Quanta provides rack-level solutions combining air-cooling and liquid-cooling technologies to help clients address the thermal and energy challenges of high-density GPU clusters—a capability that gives it a stronger entry point amid the AI data-centre expansion wave among Cloud Service Providers (CSPs).

Syncing with NVIDIA's Cadence

From a shipment-timeline perspective, starting in 2025, Quanta began shipping AI servers built on NVIDIA's GB200 and other next-generation platforms, with plans to align with the subsequent product cadence in the second half of the same year. This demonstrates that Quanta's position in the supply chain extends beyond that of a manufacturer; it is closer to a design-collaboration partner situated between CSP clients and chip suppliers, capable of tracking platform transitions and specification changes.

On the demand side, tier-one CSPs'appetite for AI infrastructure remains in a phase of rapid expansion, giving Quanta relatively clear order visibility. Under current industry conditions, the complexity of AI servers requires suppliers to possess chip-level design capabilities, large-scale manufacturing experience, and a global supply network—all of which constitute highly capital- and technology-intensive barriers to entry.

Time to Volume & Resilience

Another dividing line in AI server competition is Time to Volume—the speed at which a supplier can move a product from the development stage to mass shipment after receiving an order. For CSPs, AI data-centre buildout follows defined timelines, and a supplier's ability to deliver large volumes of servers within a short window often directly determines the client's expansion pace.

Quanta is known for high-efficiency manufacturing and quality control, and has enhanced resilience and supply flexibility through a global capacity footprint. Beyond its existing bases, the company has established or expanded production sites in the United States, Germany, Thailand, Vietnam, and Mexico; its 2025 CAPEX budget of TWD 20 billion is primarily directed toward facilities in the U.S., Thailand, and Mexico. This footprint diversifies geopolitical risk, brings production closer to major customer markets, shortens supply cycles, and strengthens delivery capability during peak AI-server demand.

Smart Healthcare Validation

Notably, Quanta has not confined its AI capabilities entirely to the data centre; it has extended part of its technology toward the application layer, with smart healthcare being the most representative example. Leveraging its existing high-performance computing, cloud, and AI analytics capabilities, Quanta has developed an AI Smart Healthcare Cloud platform, smart ambulance systems, ECG measurement devices, and Bluetooth body-temperature patches.

In 2024, Quanta's board approved the establishment of Hua-Ya Medical Device Manufacturing, signalling a capital commitment to smart healthcare. While smart healthcare is not a near-term revenue driver, it carries strategic significance: it validates Quanta's technology-integration capability across Smart Manufacturing, Smart Mobility, and Smart Healthcare—three application domains—and paves the way for long-term diversification. Beyond this, Quanta's AIoT hardware applications have been adopted by domestic medical institutions, including Tri-Service General Hospital (TSGH).

Supply-Chain Position

Quanta's role in the global AI supply chain is that of a mid-stream system integrator and volume supplier. It bridges TSMC's upstream chip-manufacturing capability with downstream CSPs'data-centre demand, serving as the critical link for technology conversion and scale production.

This position rests on three layers of barriers. First, the technology threshold: AI server design integration spans chips, motherboards, thermal systems, power supplies, and networking—demanding deep systems-integration capability and years of accumulated expertise. Second, customer stickiness: deep collaboration with top-tier CSPs generates not only orders but co-design relationships with extremely high switching costs. Third, manufacturing scale: a global capacity footprint spanning the Americas, Europe, and Asia, coupled with rapid ramp capability, is something few competitors can match.

From the perspective of Taiwan's AI supply chain, Quanta plays a pivotal mid-stream role, linking TSMC's upstream chip manufacturing with downstream CSP data-centre demand and securing Taiwan an important position in the global AI infrastructure supply chain.

BOX: Quanta Computer – Key Figures

	Figure	Period
2025 Full-Year Revenue	NT$2,123.6 billion	Full year 2025
2024 Full-Year Revenue	NT$1,410 billion	Full year 2024
Paid-in Capital	NT$38,626,274 thousand	As of March 2024
Total Employees	66,643	As of publication date (2025)

3.3 Wistron & Wiwynn: Module-to-Rack Integration

As AI compute moves from the laboratory to large-scale commercial deployment, the industry's challenge is no longer simply“faster chips” but how to integrate thousands of GPUs, thermal systems, and massive power requirements into infrastructure that operates reliably at data-centre scale.

The root of this integration challenge lies in the complexity of AI servers themselves. A single AI server often carries multiple CPUs and GPUs simultaneously, with power and cooling demands scaling accordingly. As next-generation platforms advance, the supply chain is accelerating a shift from single-unit shipments to rack-level delivery: the unit of delivery is no longer one machine, but an entire rack—or even an entire zone—of equipment that must come online on schedule.

This shift produces two direct consequences: on one hand, thermal management is moving from air cooling toward liquid cooling; on the other, data centres must simultaneously upgrade spatial planning, piping layouts, and maintenance procedures. The race is no longer about whether components can be produced, but whether an entire rack, zone, or facility can go live on time and run stably. The ability to manufacture boards and mechanical assemblies is merely the entry ticket; what truly separates contenders is converting paper specifications into maintainable, operational system capability.

As the bar rises, orders naturally gravitate toward manufacturers with systems-integration capacity, production-scheduling agility, and capital-investment capability. Tracing the path“from chips to racks, from equipment to systems,” Wistron and Wiwynn fill different segments: Wistron excels at volume production and quality control of critical modules; Wiwynn integrates products upward into data-centre-grade full-rack solutions.

Wistron: Volume Module Production

In the upstream and mid-stream segments of the delivery chain, Wistron's role is to convert a client's platform design into a product that can be stably mass-produced and reliably supplied over time. It manages the full cycle from design and manufacturing to after-sales repair, and has been reallocating resources from lower-margin businesses toward higher-value product lines—including commercial PCs, networking products, general-purpose and AI servers, and after-sales services.

In AI servers, Wistron's value concentrates on two fronts: critical-module capability and volume-production and quality-control capability. It can standardize core modules such as compute boards and GPU-related substrates, paired with thermal designs that meet high-performance computing requirements, ensuring stable production quality under unified specifications. Additionally, Wistron invests in high-speed interconnect R&D, addressing the data-centre requirement of not only“computing fast” but also“transmitting fast”—reducing the risk of performance being bottlenecked by data-transfer speeds.

For these reasons, the market commonly positions Wistron as a“system-level module manufacturer.” To address capacity and lead-time pressures, Wistron has accelerated its production-site expansion both in Taiwan and overseas, including Hsinchu, Ciudad Juárez (Mexico), Fremont and Dallas (United States), and a planned new operational headquarters at the Hsinchu AI Smart Park. These investments are not merely about expanding capacity; they also reflect the steadily rising thresholds of technical complexity, quality control, and delivery management in AI server manufacturing.

Wiwynn: One-Stop Rack Solutions

Unlike Wistron, Wiwynn adopts a direct-sales model, serving end clients directly. Its strategy focuses more squarely on data-centre-grade system integration and supply. As a cloud-computing infrastructure solutions provider, Wiwynn serves major cloud operators—such as Meta and Microsoft—directly, helping clients reduce Total Cost of Ownership (TCO). In these partnerships, Wiwynn functions not merely as a supplier but as a technical collaboration partner driving clients'cloud-expansion programmes.

Wiwynn's strength lies in rack-level system integration: not only assembling a complete rack solution, but also completing full-rack testing and validation before shipment, and assisting clients with the processes involved in deploying equipment into data centres. Facing demand for higher-wattage, higher-density racks, Wiwynn treats thermal management as a critical threshold and has invested in multiple liquid-cooling solutions—including direct liquid cooling and immersion cooling—using cold plates paired with Cooling Distribution Units (CDUs) for heat exchange to improve overall thermal efficiency.

To expand delivery capability, Wiwynn has scaled up data-centre equipment capacity in Malaysia, Mexico, and Texas (United States) to support the global delivery of rack-level solutions. The market positions Wiwynn as a“full-rack, one-stop service provider,” not solely because of hardware integration, but because it must collaborate closely with clients on system architecture, workload characteristics, data-centre onboarding, and ongoing maintenance to convert paper specifications into live, operational outcomes.

Supply Chain Systemic Synergy

Wistron and Wiwynn advance AI compute from“equipment manufacturing” further toward the“systems level.” However, converting this capability into a scalable supply still requires other links to fall into place: upstream chip supply (e.g. TSMC), mid-stream power and thermal infrastructure (e.g. Delta Electronics), and downstream deployment, governance, and real-world integration. Only then can Taiwan stand a stronger chance of assembling a complete chain—from chips to racks, from manufacturing to live deployment—in the global AI infrastructure race.

BOX: Wistron & Wiwynn – Key Operating Metrics

	Wistron Corporation	Wiwynn Corporation
2025 Full-Year Revenue	NT$2,190 billion	NT$950.663 billion
2024 Full-Year Revenue	NT$1,049.26 billion	NT$360.54 billion
Paid-in Capital	NT$28,944,351 thousand	NT$1,858,408 thousand
Total Employees	13,881	11,870

3.4 Delta: Data Centre Energy Hub

As the global data-centre buildout accelerates to support AI compute expansion, the real bottleneck is often not chips but power and cooling. Delta Electronics occupies precisely this critical link—from the grid to the facility, and from the facility to the chip: converting high-voltage electricity into the low-voltage power chips require, while managing the thermal load generated by high-density computing to keep operations running stably.

Founded in 1971, Delta began as a power-supply manufacturer and has progressively transformed from a component supplier into a data-centre infrastructure solutions provider. Repositioned around its"Grid-to-Chip" concept, Delta's capabilities span energy management, power distribution, thermal management, and system integration. In essence, Delta does not merely sell individual devices; it packages power delivery and cooling into modular, scalable architectures that match the rapid iteration and expansion demands of data-centre platforms.

Scalable Power Architectures

Inside an AI data centre, power conversion is a long chain: from utility power entering the facility, to rack-level distribution, to board-level delivery—each stage involves efficiency and loss management. Delta's approach extends the power path forward to the grid and backward to the motherboard, using high-efficiency power conversion and modular distribution as its central pillars. This allows data centres to reuse a consistent power architecture during expansion, reducing system complexity and additional losses.

More indicative still is the transient load variation that AI computing introduces. When an AI server jumps from low load to full load within milliseconds, it can generate peak surges on the power-delivery side. To address this, Delta has introduced a Power Capacitor System (PCS) with built-in lithium-ion capacitors, featuring rectification and filtering functions that provide a buffer during load peaks and supplement supply during troughs—acting as a shock-absorption mechanism for GPU burst loads. For data centres, absorbing part of the peak fluctuation at the equipment level helps mitigate the impact of power instability on computation and enhances overall system resilience.

Liquid Cooling Trends

When rack power reaches the hundreds-of-kilowatts range, air cooling approaches its limits, making liquid cooling a necessity for high-density computing. Delta's liquid-cooling portfolio spans cold-plate modules (Cold Plate Loop) and Cooling Distribution Units (CDUs), extending the thermal system from the chip level to the facility level and offering scalable solutions.

In terms of product strategy, Delta targets two scenarios simultaneously: newly built data centres and retrofits of existing facilities. For new builds, the flagship is a liquid-to-liquid CDU with a capacity of up to 2 MW (transferring heat to an external cooling system). For retrofits, a liquid-to-air CDU rated up to approximately 300 kW (returning heat to the air-conditioning system) lowers the upgrade threshold for existing facilities. This dual-track approach means Delta is not solely betting on new construction; it can also capture retrofit demand, broadening its customer base and market scale.

Integrated Energy Infrastructure

Delta's power and cooling portfolio does not stop at standalone devices; it extends to the system level. The company has proposed microgrid solutions that integrate renewable energy, energy storage, and hydrogen, emphasizing faster response to AI load fluctuations and enabling data centres to evolve from passive electricity consumers into dispatchable power nodes capable of integrating renewables. In regions where grid pressure is rising and upgrade projects are slow, microgrids are viewed as one option for boosting resilience and distributing load; Delta's involvement positions it closer to the role of a systems integrator for energy management.

Beyond power and cooling, Delta is also completing adjacent pieces of the AI data-centre puzzle. In 2025, the company acquired the power-inductor and powder-material business and assets of Alps Alpine, strengthening its passive-component capabilities. On the networking front, Delta has also launched 1.6T Ethernet switches targeting high-speed interconnects within GPU clusters. These investment directions convey a clear signal: Delta is repositioning itself from a"power and thermal supplier" into an"AI data-centre infrastructure provider."

Delta's Scaling Importance

Delta's role in AI data centres is that of the infrastructure provider enabling continued compute expansion: on one side, delivering power and stabilization from grid to chip; on the other, supporting high-density computing with liquid-cooling solutions, and extending into system-level offerings such as microgrids. As energy efficiency shifts from an ESG consideration to a hard threshold for data-centre expansion, Delta's importance within the AI supply chain is amplified accordingly.

Delta's power and thermal solutions serve both system integrators, such as Wistron and Wiwynn and international CSPs'data-centre buildout projects directly, positioning the company as an infrastructure provider that spans multiple supply-chain segments.

BOX: Delta Electronics – Key Operating Metrics

	2024 (Annual Report)	2025 (Preliminary / Q3 Data)
Consolidated Revenue	NT$421.1 billion	NT$554.885 billion (YoY +31.8%)
Paid-in Capital	NT$25,975,433,290	Maintained at NT$25,975,433,290 (per 2025 Q3 report)
Employees	81,527 (global total)	13,271 in Taiwan (as of March 2025)

Note: The 2024 employee figure reflects total global headcount. The 2025 figure covers Taiwan-based employees only (as of March 2025); the global total will be updated upon publication of the annual report.

3.5 ASUS & TWS: Sovereign AI Deployment

When governments and enterprises begin to seriously consider“keeping AI in their own hands,” the focus is not on policy declarations but on deployment solutions that can be procured under contract and formally accepted: compute resources that do not leak offshore, sensitive data that does not leave the jurisdiction, and full control over system administration.

In moving from policy documents to actual buildout, the division of labour between ASUS and Taiwan AI Cloud (formerly Taiwan Web Service, TWS) is clear: ASUS is responsible for building infrastructure and delivering it to clients; Taiwan AI Cloud operates compute centres on that infrastructure, trains models, and provides cloud services. The former turns systems into deployable, maintainable engineering; the latter turns compute into a long-term operational service. Only with both in place can Sovereign AI move from a paper blueprint to a deliverable, built reality.

ASUS: Private Cloud Construction

In the Sovereign AI deployment supply chain, ASUS plays the role of“building the system.” It has participated in the construction and subsequent system-integration work of several supercomputers listed in the TOP500[5]—including TAIWANIA 2[6]. The challenge in such projects lies not in hardware volume but in integrating compute, storage, networking, and management platforms into a single system capable of stable, long-term operation. ASUS's expertise lies precisely in converting compute from stacked equipment into manageable, maintainable infrastructure.

This capability extends to the enterprise sector as a rapidly deployable private-cloud solution. Centred on the ASUS AI Hub, paired with an Infrastructure Deployment Center and a Control Center, it enables enterprises to obtain a complete, pre-configured hardware-software solution without cobbling together multiple vendors. Crucially, it supports on-premises deployment, keeping sensitive data within the organization's own facilities rather than uploading it to overseas cloud platforms. For sectors such as manufacturing and healthcare, this is not an optional add-on but a baseline requirement for adoption.

Cybersecurity governance is the linchpin determining whether the entire system can pass muster. ASUS's cybersecurity committee is overseen at the chairperson level, and the company has adopted multiple cybersecurity and privacy-management standards. The R&D side follows Secure Software Development Lifecycle (SSDLC) and Secure Hardware Development Lifecycle (SHDLC) processes, paired with traceable production management, so that once a system goes live it possesses auditable, traceable institutional trails—ensuring that problems can be traced to root causes and responsible units. In other words, what ASUS sells is not merely hardware but a buildout capability that is verifiable and accountable.

TWS: Local Compute Operations

While ASUS handles infrastructure buildout, Taiwan AI Cloud is responsible for building and operating on-premises compute centres. Through its AI Foundry Service (AFS), it integrates compute resources and provides model-training and technical-support services. Its High-Performance Computing Centre (AIHPC) is marketed on rapid delivery, with a timeline from contract signing to go-live measured in weeks.

5 A biannual ranking of the world's 500 most powerful supercomputers, published since 1993. Used as a global benchmark for high-performance computing capability.

6 A supercomputer built and operated by Taiwan's National Centre for High-performance Computing (NCHC), previously listed in the TOP500. One of the projects in which ASUS participated in system integration.

For many enterprises, the real barrier to adoption is not model quality but the compliance risks and cost uncertainties associated with cross-border cloud services—particularly for manufacturing and healthcare, where cybersecurity thresholds are high, latency tolerance is low, and on-premises deployment is often a baseline condition. Taiwan AI Cloud lowers the barrier of building one's own data centre and assembling a dedicated team, making it easier for enterprises to translate requirements into specifications and verify outcomes against clearly defined deliverables.

Taiwan AI Cloud also serves as a“matchmaker” within the local ecosystem. Through the AIHPC Accelerator Programme, it brings together vertical-domain needs with startups and solution providers, extending the compute platform outward to the front lines of real-world deployment. In this sense, Taiwan AI Cloud is not only a compute supplier but also responsible for connecting the demand side with the supply side.

Sovereign AI Procurement & Audit

ASUS provides servers and system architecture; Taiwan AI Cloud provides platform services. This“build plus operate” relay enables Sovereign AI to be grounded along three dimensions: compute sovereignty (the data centre is domestic), data sovereignty (sensitive data does not leave the jurisdiction and is subject to local regulation), and governance sovereignty (an auditable trail runs from hardware to platform).

“Keeping AI in one's own hands” is no longer merely policy language; it is now a procurable option backed by specific vendors and a clear division of labour. For government agencies, sovereign deployment can move from a policy principle to a procurable item. For enterprises, it means compliance risks, data-leakage concerns, and cost uncertainties can be consolidated into a more manageable scope.

From Cloud to Physical Domains

What ASUS and Taiwan AI Cloud have primarily addressed, however, is the underlying deployment capability and governance framework. Taiwan AI Cloud's ambition extends further still: a city is simultaneously the most complex cross-domain data generator, the largest demand aggregator, and the most impactful application market. For AI to deliver real value in healthcare, manufacturing, and city governance, someone must still take on domain knowledge, application development, and end-user services—and weave the data and processes scattered across government agencies and industries into an operational system. In other words, what ASUS and Taiwan AI Cloud have built is the starting point for“reclaiming control”; the next step is using the city as the integration unit to bring this capability pragmatically into the actual workflows and worksites of industry.

Factories need not cloud-based analytics but edge systems that can make real-time judgments on the production line and integrate with equipment and quality-control processes. Electric vehicles need not training outputs but a complete hardware-software package that can be installed in a vehicle and operate reliably on the road over the long term. City governance needs not point solutions but integrated programmes that connect transport, healthcare, and disaster prevention across multiple agencies.

The Sovereign AI deployment platform gives governments, institutions, and enterprises a pathway that does not depend entirely on offshore cloud services. But achieving real-world deployment—and cross-market replication—ultimately hinges on systems-integration and on-the-ground delivery capability: converting cloud capabilities into on-site end systems and scaling them to more domains via global supply chains. Bringing platforms to the field and solutions overseas is precisely the strength of large-scale system integrators and manufacturers such as Foxconn.

BOX: ASUS – Key Operating Metrics

	2024 (Annual Report / Full Year)	2025 (Investor Conference / First Three Quarters)
Revenue	NT$587.1 billion (consolidated) / NT$548.5 billion (brand)	NT$535.98 billion (Jan–Sep, consolidated); Q3 brand revenue YoY +21%
Paid-in Capital	NT$7.427 billion	NT$7.427 billion (as of 2025 Q3)
Employees	16,631 (global total, end of 2024)	Approx. 16,000 globally (R&D team exceeds 5,500)

3.6 Foxconn: Integration & Global Delivery

On the compute-infrastructure front of Taiwan's AI supply chain, TSMC drives advanced-process capacity upstream; Quanta, Wistron, and Wiwynn integrate chip platforms into server and rack systems mid-stream; Delta Electronics supplies the power and cooling link; and ASUS, together with Taiwan AI Cloud continue to build out the Sovereign AI cloud platform.

Yet AI's value will not remain confined to the data centre. The next critical step is whether it can enter factories, vehicle fleets, and city governance—becoming end systems that operate on site and can be replicated across markets.

On the path from cloud to field, Foxconn typically takes up the final leg: on one hand, packaging data-centre compute capability into field-ready systems; on the other, using systems integration as its central axis to link hardware, software, supply chain, maintenance, and local deployment into a relatively complete go-live model—extending Taiwan's AI supply chain from infrastructure into real-world applications.

Platform Integration & Turnkey Solutions

Foxconn's advantage in physical-world AI lies less in any single point of technological leadership than in its systemized integration capability: organizing complex technologies and supply chains into platforms and turnkey solutions that make client adoption easier and timelines more controllable.

Take electric vehicles as an example. The MIH Consortium[7]—an open B2B platform—standardizes shared modules, interfaces, and specifications into a common module platform, allowing partners to focus resources on differentiated customization. At the same time, it integrates components and certification standards upfront, bringing the traditionally closed and fragmented automotive supply chain closer to modularisation and standardization. The platform's value lies not merely in ecosystem scale, but in whether it can align the supply chain under a single set of specifications and thereby produce mass-manufacturable vehicles and systems.

The same logic appears in Foxconn's modular data-centre strategy. It offers an end-to-end solution from construction to operations, targeting the needs that arise once clients shift from“buying equipment” to“building infrastructure”: beyond specifications, they care about construction timelines, maintenance, staffing, and risk management.

CityGPT: The City Brain Platform for Smart-City Integration

In the smart-city domain, CityGPT is conceived as a City Brain platform embedded within a broader AI City architecture. On one hand, it provides a cross-departmental data and application integration framework; on the other, it can be combined with Foxconn's modular data centres and managed operations and maintenance services, covering part of the compute-infrastructure buildout and operations and complementing the compute platforms and governance services of other partners.

CityGPT typically does not operate in isolation; rather, it functions as the core of Foxconn's smart-city ecosystem, deployed in concert with its modular data centres and managed operations and maintenance services. In terms of division of labour, Foxconn not only provides the city-application framework but also takes on the compute-infrastructure segment—for example, modular data-centre construction and managed data-centre operations. This means that within an AI City initiative, Foxconn covers not just applications but also infrastructure turnkey delivery and operations, complementing the compute platforms and governance services of other partners.

7 An open electric vehicle platform alliance initiated by Foxconn, providing shared modules, interfaces, and certification standards to enable modular EV development across supply-chain partners.

Globalized Deployment & Compliance

If MIH and CityGPT demonstrate platform-level integration capability, Foxconn's harder-to-replicate advantage still lies in its ability to bring solutions to overseas markets and complete local deployment. Foxconn's manufacturing and supply-chain network spans multiple countries, with localized production as a strategic mainstay—using“produce locally, serve local markets” to navigate changes in tariffs, compliance, and geopolitical risk.

Equally important is Foxconn's long-accumulated trade-compliance, customs, and logistics expertise. When clients need to shift production origins or reconfigure supply chains, Foxconn can typically provide greater room for adjustment and faster switching speeds. In terms of supply-chain division of labour, upstream players excel at producing chips and compute equipment; mid-stream players excel at converting platforms into servers and rack systems; and power, cooling, and sovereign cloud platforms are progressively falling into place. Foxconn then integrates these capabilities into field-ready system solutions and, through its global network, drives them into different markets to complete local deployment and volume supply.

This capability was not built overnight; it rests on Foxconn's decades of ICT volume-production management and supply-chain operations. As AI servers, electric vehicles, robotics, and other domains enter larger-scale deployment phases, Foxconn's advantage lies in pushing“can be built” forward to“can be scaled and taken to market,” and extending“works in one market” to“can be deployed in another.”

Ecosystem Integration: From Supply Chain to the Field

Yet no matter how complete the supply chain, it does not mean that real-world applications are already in place. The real challenge is: how can capabilities from each segment be integrated into systems that operate in actual domains? How should governance and trust mechanisms be designed to gain acceptance in international markets? And how can existing advantages be organized into a replicable, exportable“Taiwan model”? These answers can hardly come from any single company; they depend on collaboration across every segment of the supply chain, and on alignment with government governance and local needs.

For this reason, AI City is better understood as a pathway for“organizing supply-chain advantages into an exportable template”: from compute and models, to governance and trust platforms, to application showcases and ecosystems—assembling capabilities from each segment. In March 2026, the ASUS Group, Foxconn, and the Taiwan Smart City Solutions Alliance (TSSA) launched the world's first“AI City Pavilion” at the Smart City Summit & Expo 2026 (SCSE 2026), connecting government, citizens, and industry partners. Under the banner of the“AI City National Team,” they formally unveiled the system architecture and technology applications for urban Sovereign AI. This marked the first time Taiwan's AI industry presented itself to international markets as a holistic solution—rather than as individual hardware products.

Foxconn handles infrastructure buildout and operations on one side, while on the other, it possesses the advantage of taking integrated solutions overseas, occupying a position of“local integration, global push.” This also signals that Taiwan's AI industry is moving beyond the point advantage of hardware manufacturing toward ecosystem export, with the city as the domain and hardware–software integration as the model.

From an industry-trend perspective, cities including Manchester, Dubai, and Singapore have already chosen to promote AI ecosystems at the city level; Sovereign AI is becoming a shared consensus across different countries and cities. Taiwan's differentiator lies not in having identified the same direction, but in already possessing a complete supply chain from chips to end devices—enabling it to convert Sovereign AI from a concept into a procurable, deployable solution.

How AI City can accumulate validation in cities such as Tainan, Kaohsiung, Yunlin, and New Taipei City and then extend overseas—forming cooperation templates with European countries, including the Netherlands—will be a critical test of whether Taiwan's AI supply chain can truly go global.

BOX: Foxconn – Key Operating Metrics

	2024 (Annual Report / Full Year)	2025 (Investor Conference / First Three Quarters)
Revenue	NT$6,860 billion	NT$5,500 billion (Jan–Sep consolidated); Q3 single-quarter YoY +11%
Paid-in Capital	NT$138.917 billion	NT$138.917 billion (as of 2025 Q1)
Employees	633,167 (global total, end of 2024)	634,077 (as of 2025 Q1)

Ch 4

AI City—From Supply-Chain Advantages to an Exportable Domain Solution

The preceding chapters established three things: global AI competition is shifting from model performance toward deployment and governance; Taiwan's government has built institutional enabling conditions while enterprises still face structural implementation gaps; and Taiwanese enterprises have formed a relatively complete supply chain from chip manufacturing to end-user delivery.

A complete supply chain, however, does not automatically produce deployable domain solutions. AI City is Taiwan's answer to this gap—an integration framework that uses the city as its unit, assembling compute infrastructure, governance mechanisms, and vertical domain applications into a solution that can be demonstrated, replicated, and exported. The city is a pragmatic choice: it encompasses multiple domains within a single governance boundary, provides a clear counterpart for data authorisation and regulatory alignment, and offers the most visible proof point for international cooperation partners. AI City is currently taking shape in Tainan as a demonstration city, with the AI City Industry Alliance—formally launched at the Smart City Summit & Expo 2026—presenting its system architecture and urban Sovereign AI solutions to international markets for the first time.

4.1 Architecture & Division of Labour

AI City integrates three capabilities at the city level, structured from bottom to top: Sovereign AI compute and models; governance and trust mechanisms; and vertical domain applications.

Layer 1: Compute & Model Infrastructure addresses where computation happens, where data is stored, and who trains the models. The core principle is Sovereign AI: critical data and compute remain within national borders, models can be locally optimised, and governments retain operational control without full dependence on offshore cloud providers. In Tainan, the CRYSTAL 26 supercomputer operated by NCHC serves as the compute foundation; Taiwan AI Cloud provides sovereign cloud services, a model-training platform (AI Foundry), and CityOS[8] as the city operating system connecting compute to applications. In Kaohsiung, Foxconn is building an advanced compute centre anchored on NVIDIA GB200, targeting smart manufacturing, smart EV, and smart-city requirements.

Layer 2: Governance & Trust Mechanisms ensures that data usage, model inference, and decision pathways are auditable, traceable, and aligned with local regulations and cybersecurity requirements. This layer—supported by the principles and risk-classification framework of Taiwan's Artificial Intelligence Basic Act—is what makes the system legible and acceptable to international cooperation partners, not just technically functional.

Layer 3: Vertical Domain Applications is where end users experience outcomes directly. AI City currently focuses on four urban pain points: smart transport, smart healthcare, smart disaster prevention, and civic services. ASUS Group has achieved the most tangible results to date in transport and healthcare, forming replicable delivery modules. Foxconn deploys CityGPT as the core platform of its smart-city solution, integrating cross-departmental data and converting siloed government systems into services accessible to citizens and public agencies. Within each domain, software vendors play the critical role of converting platform capabilities into services that match on-the-ground operational needs.

8 A city operating system developed by Taiwan AI Cloud, designed to act as the central dispatcher connecting underlying compute infrastructure with upper-layer city applications within the AI City framework.

4.2 Three Cooperation Entry Points

AI City deployment will not advance uniformly. Different cities exhibit different development characteristics depending on their policy positioning, infrastructure progress, and industrial structure, and each corresponds to different cooperation entry points. The following reviews three representative domains.

Tainan Shalun is the compute and governance core of AI City. The infrastructure is in place; what is needed now is vertical application development. The cooperation opportunity lies in converting the compute foundation into operational service chains—particularly in healthcare, disaster prevention, and green-energy integration—and building data-usage rules, maintenance mechanisms, and accountability structures into the design from the outset rather than retrofitting them later.

Kaohsiung Asia New Bay Area is an industrial and systems-integration hub, with Foxconn's southern headquarters, an NVIDIA-backed compute centre, and over a hundred enterprises already established in the area. The opportunity here is cross-border commercial-model validation: using Foxconn's systems-integration capability and the port infrastructure to develop and test smart-city solutions explicitly designed for replication in Southeast Asian and European markets.

Yunlin presents a domain-first entry point, where AI adoption is driven by structural pressure rather than policy ambition. Agriculture, water resource management, and precision farming are areas where single-site validations already exist but have not yet coalesced into scalable city-level workflows. International partners with deep vertical expertise have the opportunity to co-define the integration architecture at an early stage—before roles are fixed and specifications are locked.

4.3 Why Now, and Why Dutch Companies Should Move First

Taiwan's AI supply chain has spent the past decade building the hardware foundation: chips, servers, racks, power infrastructure, sovereign cloud platforms, and systems-integration capability spanning from the data centre to the field. That foundation is now in place—and deployed not just in Taiwan, but embedded in data centres, enterprise systems, and city infrastructure across global markets.

The next competitive frontier is the software and domain layer: the vertical expertise, workflow integration, and governance design that turns hardware capability into services people and institutions actually use. This is precisely where the gap is, and where the opportunity is most open.

Dutch companies are well-positioned to fill it. The Netherlands has accumulated deep domain expertise in areas that map directly onto AI City's application priorities: water resource management, precision agriculture, healthcare systems design, urban mobility, and institutional governance frameworks. These are not peripheral add-ons to AI City—they are the domains where AI City needs credible, experienced partners to move from pilot to scale.

The timing matters. AI City's architecture is still being defined. Standards, interfaces, and delivery models are being shaped now, in the current generation of demonstration projects. Partners who enter at this stage have the opportunity to influence how the system is built—not just to plug into a system that others have already specified. Early movers gain preferential positioning in the supply chain, deeper integration with the enterprise ecosystem, and a stronger basis for co-developing solutions that can be replicated across markets together.
The practical entry path is direct: Taiwanese enterprises across the supply chain—from compute platforms to systems integrators to application developers—are actively looking for domain partners. The combination of Taiwan's hardware-software integration depth and Dutch vertical domain expertise is not a future aspiration; it is a partnership structure that can be assembled now, with real projects, real customers, and real delivery timelines on both sides.

4.4 Taiwan–Netherlands Ecosystem Alignment

Taiwan and the Netherlands possess structurally complementary conditions. Taiwan's strengths lie in a complete ICT supply chain from semiconductors to end devices, hardware–software systems-integration experience, and a practical foundation for Sovereign AI governance within a democratic society. The Netherlands'strengths lie in vertical domain expertise, institutional design for urban innovation, and familiarity with European market regulations and channels. The alignment is a mutual complement of capabilities.

Cooperation can unfold across three tiers. First, urban domains: designating AI City demonstration zones as bilateral Living Labs where solutions can be tested and validated in real environments. Second, innovation clusters: connecting both industry nodes through institutionalised channels so that startups and software vendors gain pathways into each other's markets. Third, a governance and security alliance: building on both sides'risk-based regulatory frameworks to jointly develop audit and accountability mechanisms aligned with international standards.

AI City is not merely a smart-city initiative. It is an integration framework that brings together compute infrastructure, trust mechanisms, and domain applications into a deployable and exportable urban solution. Taiwan's next opportunity lies not only in supplying AI technologies, but in organising them into operational systems that international partners can enter, validate, and scale. The task ahead is concrete: select pilot domains, embed governance and accountability into implementation from the outset, and turn cross-border cooperation into measurable practice—starting now.

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