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BEYOND CAUTION: REFRAMING INDIA–TAIWAN COOPERATION IN A TRANSFORMING INDO-PACIFIC

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ABSTRACT

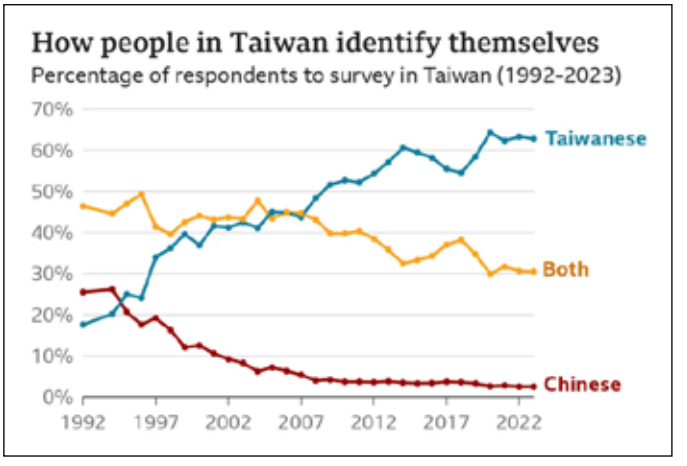
In a rapidly transforming Indo-Pacific marked by technological competition and supply-chain vulnerabilities, India–Taiwan engagement warrants strategic reassessment. Despite long-standing caution, both sides share growing economic, maritime, and technological complementarities. This article argues for a calibrated, interest-driven framework that moves beyond hesitation toward structured cooperation. By situating Taiwan within India's broader Indo-Pacific vision, it highlights pragmatic pathways for resilient and mutually beneficial partnership.

The connections between India and Taiwan are relatively recent, carefully calibrated, and often astonishingly understated, yet they carry considerable scope for constructive cooperation. Taiwan increasingly demonstrates areas of convergence with India across multiple strategic, economic, and societal domains in the current milieu. This article proposes that a more clearly articulated, interest-based framework for engagement may equip both sides to better identify and pursue areas of mutual benefit. It re-examines certain long-held assumptions concerning Taiwan—such as the view that India–Taiwan relations are overly contingent on broader geopolitical fluctuations, or that the relationship lacks resilience in the face of regional tension—which have often contributed to a cautious approach in New Delhi. The analysis suggests that these perceptions, while rightfully intended to guide India's comprehensive diplomatic stance, warrant reconsideration in certain aspects, particularly given contemporary regional dynamics and India's evolving long-term interests.

To understand the strategic stakes, it is crucial to begin with Taiwan's long-standing predicament, along with its broader significance to the global economy. Taiwan is a self-governed, multiparty democracy with a dynamic civil society. Its political identity— which is argued to be distinct from that of mainland China—

has progressively crystallised over the past three decades, with opinion polls consistently indicating an increase in the number of citizens who identify themselves primarily as Taiwanese.

Figure 1: How people in Taiwan identify themselves



Source: BBC (which credits National Chengchi University)

The following tabulation, extracted from the *"Public's View on Current Cross-Strait Relations (2025.10)"*, *Mainland Affairs Council*, is particularly telling:

> *"The CCP claims that there is only one China in the world, that Taiwan is part of China, and that this represents the true status quo in the Taiwan Strait. Do You agree with the CCP's statement?"*

Table 1 : Public's View on Current Cross-Strait Relations (2025.10)

Strongly Agree	Agree	Disagree	Strongly Disagree	Don't Know/ No Opinion
2.3%	8.0%	37.1%	44.7%	7.9%
10.3%		81.8%		

Source: Mainland Affairs Council

This identity shift intersects with Taiwan's unparalleled role in global supply chains, particularly in the manufacture of advanced semiconductors and involvement in upstream input industries equipped with high-end machinery. The theoretical question at this juncture would be whether Taiwan's economic relevance is inseparable from its political autonomy. So far, this reality shapes the lens through which Taipei engages with like-minded partners, including India.

China, for its part, continues to assert that Taiwan is a breakaway province destined to reunite with the mainland, and has not ruled out the potential use of force as a means to achieve this objective. Cross-strait economic, familial, and business ties remain dense, yet political mistrust deepens with every military incursion, cyber

operation, and diplomatic coercion aimed at narrowing Taiwan's international access and visibility. The tension generated by this evolving dynamic is not merely bilateral; in fact, it reverberates across global markets, shipping lanes, technological ecosystems, and security architectures.

It is within this broader picture that India's approach to Taiwan must be understood. New Delhi has consistently maintained a cautious but stable indulgence that acknowledges Taiwan's economic and demographic significance while avoiding any positioning that could be misconstrued as a challenge to the "One China" sensitivities surrounding the mainland. The prevailing wisdom—that closer ties with Taiwan might provoke diplomatic or strategic complications vis-à-vis China—has historically encouraged incremental engagement. Yet, as several scholars have observed, this cautious outlook sits uneasily with the reality that India and Taiwan experience comparable forms of strategic pressure from external powers, derive benefit from like-minded diversified economic partnerships, and share an existential interest in maintaining a free, open, and rules-based Indo-Pacific.[1]

The reservedness, therefore, exists not in the absence of shared interests but despite them, yet reflect the endurance of longstanding assumptions. These assumptions include the belief that India–Taiwan ties are inherently vulnerable to geopolitical fluctuations, or that the relationship lacks resilience in moments of regional tension. Such perceptions have often shaped New Delhi's diplomatic instincts, even as the strategic logic of broader cooperation becomes increasingly evident in contemporary times. Under such circumstances, it is argued by some that Taiwan must take more proactive steps—through investment outreach, academic collaboration, and technology-focused diplomacy—to shift the relationship from episodic engagement to something more structured, sustained, and mutually beneficial.

The economic and maritime dimensions of this relationship are particularly compelling. Taiwan occupies a central position in the network of global maritime commerce. It sits astride sea lanes indispensable to global trade, and its industrial base forms an equally valuable strategic node that underlies the functioning of the international digital economy. For India—whose stated maritime policy of MAHASAGAR signals a clear emphasis on a free, open, stable, and inclusive Indo-Pacific—Taiwan's role can hardly be stated as being peripheral. It is, in fact, pivotal.

The Indo-Pacific region is increasingly shaped by intersecting pressures— the intensifying and highly scrutinised US–China rivalry, the persistent consequences of the Russia–Ukraine conflict, the numbing fragility of global supply chains in the face of conflict, the emergence of climate-induced maritime vulnerabilities, and the proliferation of hybrid and grey-zone activities by belligerent actors, which range from cyber intrusions to disinformation and incremental coercion at sea. These pressures suggest that India's long-term geoeconomic interests — and her maritime interests in particular — are better served by engaging a diverse set of technologically capable and value-sharing partners, which should certainly include Taiwan. The nature of such engagement might vary, but sustained interaction and progress remain key.

The role of shared democratic values in this partnership must not be relegated to mere symbolism. Values matter greatly since they create predictable environments for cooperation, reduce politically-influenced risk for investors and institutions, and facilitate reliable frameworks for technology transfer, research collaboration, and regulatory coordination. Taiwan's ability to maintain diplomatic agility despite structural constraints is a reassuring feature. While India does not require Taiwan to act as an overt diplomatic advocate— or to rally political opinion on New Delhi's behalf— Taiwan's globally recognised credibility and its wide network of formal and informal partnerships offer a subtler but significant advantage.[2] Many regions where India's diplomatic presence remains comparatively modest may also be the very ones in which Taiwan has developed durable relationships, development partnerships, or a degree of symbolic influence earned through sustained engagement.

This dynamic is not novel— either conceptually or in practice— yet it remains relatively under-examined in the specific context of India–Taiwan engagement. The resulting geographic asymmetry presents a strategic opportunity that need not require any alteration of India's established positions or any subversion of current political sensitivities in favour of long-term interests. Rather, it simply acknowledges that India may draw on Taiwan's accumulated legitimacy, access, and local familiarity in these regions—and equally, that Taiwan may benefit from India's expanding footprint and wider strategic networks.

A pertinent example of such progressive partnership avenues can be identified by studying the semiconductor ecosystem's structural vulnerabilities at a global level, which includes, as its subset, vulnerabilities faced by Taiwan — to the disruption of neon gas supplies following the Russia–Ukraine conflict. Taiwan, which is the

hub of the world's most advanced semiconductor fabrication capacity, has been significantly affected by the sudden escalation in upstream input costs and the volatility of critical supply chains due to the Ukraine conflict. Semiconductor-grade neon is indispensable to the lithography processes used in chip manufacturing, and Ukraine had been among the world's key producers, refining close to 50 per cent of global neon output to the purity standards required by fabrication facilities.[3]

As the conflict worsened, neon production in Ukraine contracted sharply as industrial plants were damaged or forced offline, and export routes were disrupted. The immediate effect was a surge in prices, followed by prolonged uncertainty over the availability of a material essential to maintaining uninterrupted chip production cycles.[4] For Taiwan, where semiconductor manufacturing forms the backbone of both domestic economic activity and global value chains, this rupture imposed substantial operational risks. Fabrication plants were compelled to reassess their procurement strategies, diversify suppliers where possible, and prepare for the long-term financial implications of elevated and unstable costs.[5]

More broadly, the neon shortage shed light on the fragility of hyper-concentrated supply chains and underscored the risks associated with over-reliance on a limited set of geographically vulnerable suppliers. This episode has therefore become a critical case study in understanding the strategic motivations behind Taiwan's search for more diversified and resilient upstream partnerships. It reveals why Taipei, despite its technological leadership, remains deeply dependent on stable access to foundational raw materials — dependencies that can neither be substituted easily nor scaled domestically at unpredictable short notice.

This turbulence, however, offers an opening for India to engage with Taiwan under its evolving semiconductor policy ecosystem — including the "India Semiconductor Mission" (ISM) and newly launched component-manufacturing and fabrication schemes — where its ambition to build domestic chip capabilities is reflected amply.[6] As of mid-2025, multiple greenfield and ATMP (assembly, testing, marking, packaging) projects have been approved or initiated, signalling an internal shift— a transition from being a consumer to a potential contributor within the global chip value chain.[7]

India's emerging policy direction reflects an interest in embedding itself more deeply within the semiconductor value chain, spanning the production of materials and specialty gases, upstream chemical inputs, precision manufacturing equipment,

Table 1: India's Emerging Eco-System: key manufacturing and ATMP investments (2023-2025)

Date	Company	Location	Investment	Output Capacity
Jun 2023	Micron Technology	Sanand, Gujarat	₹22,516 crore	ATMP Facility, with phased ramp-up
Feb 2024	Tata Electronics (TEPL) with PSMC (Taiwan)	Dholera, Gujarat	₹91,000 crore	50,000 wafers/month
Feb 2024	CG Power & Industrial Pvt Ltd with Renesas & Stars	Sanand, Gujarat	₹7,600 crore	15 million chips/day
Feb 2024	Tata Semiconductor Assembly and Test Pvt Ltd (TSAT)	Morigaan, Assam	₹27,000 crore	48 million chips/day
Sep 2024	KaynesSemicon Pvt Ltd	Sanand, Gujarat	₹3,307 crore	6.33 million chips/day
May 2025	HCL–Foxconn JV	Jewar, Uttar Pradesh	₹3,700 crore	20,000 wafers/month (36M units/year)
Aug 2025	SicSem Private Limited	Bhubaneshwar, Odisha	₹2,066 crore	60,000 wafers/year; ATMP: 96M units/year
Aug 2025	3D Glass Solutions Inc.	Bhubaneshwar, Odisha	₹1,943 crore	70,000 glass panels/year; ATMP: 50M units/year
Aug 2025	CDIL (Continental Device)	Mohali, Punjab	₹117 crore	158 million units/year
Aug 2025	ASIP (Advanced System in Package Technologies)	Andhra Pradesh	₹468 crore	96 million units/year

Source: PIB, India's Semiconductor Revolution: Powering the Future of Electronics

and the full suite of packaging and testing functions.[8] In this context, the neon-gas shortage afflicting Taiwan underscores a structural vulnerability which India can help address. Given India's industrial base, its chemical sector capacity, and a growing emphasis on domestic upstream supply, the country is well placed to emerge as a diversified supplier for critical inputs, including gases, chemicals, and specialty materials.

Such a role would not only support India's own escalating stakes and interests, but also offer international chip-making hubs — including those in Taiwan — a more resilient and geographically diversified supply chain. Further, as Taiwan remains tightly integrated into global manufacturing and export networks, access to reliable alternative sources of high-purity gases and chemical inputs would reduce pressure arising from geopolitical shocks. Conversely, India would also benefit by supplying these inputs as they help build industrial capacity, create skilled jobs, strengthen chemical and materials sectors, and create a niche for itself within the global semiconductor value chain in a way that is less politically fraught — focusing on commerce, industry, and technology rather than upon diplomatic complexities.

In sum, the neon-gas crisis triggered by the Russia–Ukraine conflict reveals an inherent fragility in global chip supply. Yet, it also opens a window — one through which the cascading effects of India's strategic push toward semiconductor self-reliance can align with global demand for supply-chain resilience. By positioning itself as a credible supplier, leveraging domestic chemical and materials industrial capacities, and coordinating with global chip hubs such as Taiwan, India can transform a global vulnerability into a durable competitive advantage — all without directly challenging existing diplomatic equilibrium, yet while contributing meaningfully to a more stable, diversified semiconductor ecosystem.

However, such collaboration cannot occur in isolation. It requires institutional platforms that support people-to-people movement, joint research, language training, and curricula that prepare Indian engineers, scientists, and policy practitioners to work in and with Taiwanese structures. Expanding Indian academic visibility in Taiwan—whether through joint centres, visiting fellowships, or trilateral programmes with like-minded partners—could play an essential role in strengthening this ecosystem.

Non-traditional security issues provide another promising avenue for cooperation. Both India and Taiwan face similar forms of hybrid pressure—from cyberattacks to disinformation campaigns—as well as similar climate-driven maritime risks, such as coastal erosion, port vulnerabilities, and extreme-weather disruptions to shipping. Taiwan's unique fusion of technological sophistication and environmental adaptation offers India significant opportunities for collaborative learning. Joint research on maritime cyber security, climate–technology interfaces, ocean pollution, and port resilience would serve both nations' long-term interests.

CONCLUSION

The unfolding dynamic between India and Taiwan illustrates a relationship that has outgrown the assumptions long used to contain it. Taiwan's political evolution and its centrality to global technological supply chains, combined with India's expanding role in the Indo-Pacific (and globally), together form a thought-provoking rationale for rethinking the contours of bilateral engagement. The wheels are already in motion as a high-level delegation from India reportedly visited Taiwan around the dates of Semicon Taiwan Summit 2025.[9] Furthermore, the Federation of Indian Chamber of Commerce and Innovation (FICCI) is organising a high-level Business Mission to Taiwan on 02 and 03 December 2025. The official FICCI website, highlighting forthcoming events, remarks:

> *"…over the years, India has emerged as an important investment destination from Taiwan and investors from Taiwan are looking at India as a bright future in the next 10 to 15 years. Government policies such as Make in India and Production Linked Initiatives (PLIs) in automotive electronics & components, semiconductors, electronics & EVs have further encouraged Taiwanese investments and Joint Ventures in India. This visit will explore and cultivate potential avenues for collaboration and partnership with Taiwanese Companies across a diverse range of industries, including fostering partnerships in sectors of mutual interest, including Electronics & Semiconductors, Auto & Auto components, Electric Vehicles (EVs), Infrastructure, Smart Manufacturing, Green Technologies, among others. FICCI in partnership with TAITRA, CNFI, III & CIECA will organise the following important business engagements during the visit: (1) High-level meetings with government officials, industry leaders, and strategic partners as well as call-on meetings with Ministers, (2) 2025 India-Taiwan Industrial Collaboration Summit, and (3) 21st India-Taiwan Business Cooperation Committee Meeting."*[10]

The Indian Foreign Minister, S Jaishankar, recently visited China and remarked that India maintains its position on Taiwan. Due to conflicting comments from Chinese media outlets, the Indian government released a statement through reliable channels, which stated:

> *"…The Chinese side raised the issue of Taiwan. The Indian side underlined that there was no change in its position on this issue. It pointed out that, like the rest of the world, India had a relationship with Taiwan that focuses on economic, technological and cultural ties and that this would continue. The Indian side noted that China also cooperates with Taiwan in these very domains."*[11]

At a moment when the Indo-Pacific is defined by strategic uncertainty, contested sea lanes, and accelerating technological competition, the logic of collaboration—

however calibrated—is impossible to ignore. Supply-chain diversification, maritime stability, technological collaboration, and resilience against non-traditional security threats, all offer pathways that remain firmly within India's stated framework while simultaneously advancing long-term national interests.

In this sense, the India–Taiwan engagement need not be dramatic, declaratory, or diplomatically conspicuous. It can be pragmatic, incremental, and institutionally grounded — built through academic networks, technological exchanges, maritime research, and societal linkages that carry strategic weight precisely because they do not provoke unnecessary political contestation. Far from jeopardising India's regional diplomacy, such an approach strengthens New Delhi's capacity to operate confidently within a rapidly changing Indo-Pacific order. If India's vision of a stable, open, and rules-based maritime region is to retain credibility, then Taiwan's role—subtle yet substantial—must be understood as a relevant and responsible component of that wider picture.

WAY AHEAD

1. **Strengthen Non-Governmental Knowledge and Technology Platforms** India can expand engagement through universities, technical institutes, maritime research centres, and professional engineering bodies. Establishing joint research clusters with Taiwanese institutions, thereby creating durable, apolitical channels for cooperation. Such platforms remain outside formal diplomacy yet build the intellectual infrastructure necessary for long-term partnership.

2. **Build a Structured Mobility and Training Framework for Technical Talent** Academic mobility, industry internships, and specialist training programmes in Taiwan can equip Indian engineers and policy practitioners with high-precision skills. These exchanges generate a workforce conversant with Taiwanese industrial processes and strengthen India's domestic capabilities without invoking political sensitivities.

3. **Expand Collaborative Supply-Chain Research and Upstream Industrial Partnerships** India's growing chemical, materials, and precision-engineering sectors can align with Taiwan's need for diversified upstream industrial inputs. Joint feasibility studies—led by industry associations, and think tanks— concerned

with required technologies would identify complementarities and reduce global vulnerabilities exposed during the neon-gas disruption.

4. **Develop Multi-Stakeholder Track-1.5 and Track-2 Dialogues Focused on Non-Traditional Security** Think tanks, maritime institutes, and technology-policy forums can invite Taiwanese entities to participate in discussions on climate-driven maritime risks, hybrid threats, port resilience, and cyber vulnerabilities. These dialogues allow both sides to share expertise in politically non-contentious domains while contributing to Indo-Pacific stability.

5. **Generate Joint Studies on Semiconductor Ecosystems and Climate–Technology Interfaces** The establishment of mixed study groups—hosted in Indian institutes with Taiwanese academic or industrial participation (or vice versa)—would support curriculum development, research, and knowledge exchange.

6. **Leverage Taiwan's Regional Presence to Complement India's Global Outreach** Indian think tanks, export bodies, and industry platforms can coordinate with Taiwanese partners to jointly host development seminars, commercial roadshows, or maritime-capacity workshops involving multinational representatives across the Indo-Pacific, expanding India's visibility in regions earlier unfamiliar or less exposed to it.

ENDNOTES

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About the Author

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