

Rising under DIY Entrepreneurship and “Subsidyism”: Taiwan’s Indie Music in the Twenty-First Century

Miaoju Jian

Introduction

Since 2010, independent music (hereafter referred to as “indie” music) has become a significant driving force of musical innovation for the younger generations in Taiwan. Popular rock festivals, such as Megaport Festival (2006–) and Vagabond Festival (2019–), are large-scale music festivals with 80,000 to 160,000 mostly young attendees in the past five years, featuring performances by local, Asian, and international indie bands. Since 2015, indie rock bands like Fire EX., No Party For Cao Dong, and Sunset Rollercoaster have, respectively, won awards for Song of the Year, Album of the Year, and Best Band at the mainstream Golden Melody Awards. All prominent trends and snapshots happened over the last decade. This chapter reconstructs the history of indie music’s rise in Taiwan since the early 2000s. Chiefly, it explores how contemporary indie music in Taiwan has been shaped by globalized DIY entrepreneurship and governmental subsidy policies. There are four sections. The first part introduces the history and the global trend of independent music entrepreneurship in the past decade. The second section reviews the turning point of indie music in Taiwan from the early 2000s to early 2010s. The third section introduces the indie music subsidy policy initiated by the Taiwanese government in 2007. The policy gradually expanded its scope toward the mainstream music industry and has been a continuous source of subsidy since 2010. The fourth part presents the new wave of entrepreneurship after the prominent indie music scene was nurtured by the subsidy policies. The chapter concludes by reflecting on the changing nature of Taiwan’s indie music in the twenty-first century.

From DIY Entrepreneurism to Promotional Government

Over the past two decades, the paradigm of the global popular music industry has shifted. Looking back at the late 1990s and early 2000s, the emergence of internet communication technologies expanded and seemed to democratize and demystify the popular music industry around the world. Through the wide circulation of Western indie music since the 1990s, the DIY ethos became widely associated with alternative cultural movements and resistance against the mainstream music industry (Bennett and Peterson 2004; O'Connor 2008). Although the DIY movement has a forty-year history as an alternative approach to music-making and distribution, it is often associated with the rise of punk and post-punk in the late 1970s and the rise of indie, electronic, and rave music in the 1980s and 1990s (Azerrad 2001; Reynolds 1998, 2006). However, the historical DIY scene is also associated with a specific desire for the democratization of culture that is distinctly niche and defiant. Participants have questioned the organization, cultural convention, and purpose of the music industries and called for their reinvention and even abolition. DIY music also implies a preference for the intimacy of small venues and the temporary communities that form in them to make music, rather than seeing them as a stepping stone to the mainstream. As a result, DIY prioritizes accessible and participatory aesthetics rather than high technical skill. The stance democratized the traditional recording industry in terms of music production, distribution, and experience. The burgeoning independent music market has been called the “democratic DIY business” in defense of alternative culture (Jones 2021, 1).

However, since 2010, social media and streaming platforms have emerged as new mainstream cultural arenas. Both professional and independent artists are increasingly required to independently use social media in a “de-intermediated” direct interaction with fans (Baym 2018; Hodgson 2021; Morris 2014). As the aesthetics and operational boundaries between mainstream and indie music are increasingly blurred, DIY culture and indie music have become more normalized. The reasons for this transformation can be explained through three processes. First, since the 2010s, independent music businesses with an entrepreneurial spirit have emerged in large numbers worldwide. Within neoliberalism, especially young individuals increasingly struggle with precarious work conditions in short-term employment and the disproportional effects of rent hikes; subcultural lifestyles and knowledge have led to the rise of DIY careers because of this (Bennett 2018). With music as the primary site

for DIY entrepreneurship, many adolescents and young adults form a sizeable alternative group that operates outside formal qualifications and training. They successfully applied knowledge of international indie music labels and associated subculture networks to their DIY careers, creating career paths and businesses through record shops, event management, and music labels. The internet has also accelerated the global spread of the DIY ethos. Independent music scenes shape youth identities through resistant aspirations and DIY ethics found not only in the anglophone West, but also in Taiwan (Jian 2018).

Second, DIY practices have become the “new default” (Jones 2021, 7) for music practitioners; both the roles of record companies and artists have changed, whether mainstream or independent. In the past, the music industry focused on record sales and the creation of pop stars. Record labels, mass media, and distributors were the leading players of the industry, or in other words the gatekeepers of the old record sales paradigm. Public relations and concerts were only meant to support and expand record sales. Whereas in the context of the ever-growing digital revolution and the rise of social media, artists are less and less dependent on the traditional intermediaries of the music industry. Many artists now distribute their music directly over the internet, to reach broad local, translocal, and global audiences directly. For example, Radiohead pioneered a new marketing technique in 2007 by releasing its digital albums directly online and allowing downloaders to set prices (Tschmuck 2016). The music industry’s seeming democratization opened new, unregulated doors for musicians to potentially reach large audiences. DIY has become the new mainstream indicated by the weakened influence of the major record labels. Musicians have changed from dependent contractors to artistic entrepreneurs (Tschmuck 2016, 16), becoming the center of the value chain of music, with broad autonomy and direct handling of support services.

Third, independent music now accounts for a growing share of global music industry revenues. The development of digital technology has already encouraged more music creation. The number of new compositions added each month to music platforms in 2018 was more than the double that of 2004 (Krueger [2019] 2021, 261). Furthermore, due to streaming, music has become a revenue driver for the global music industry since 2017 and already accounted for 67 percent of the total music industry by 2022 (IFPI 2023). The so-called indie music is now generating revenue from independent labels and a growing number of unsigned DIY artists. For example, in 2019, the global music industry generated \$21.5 billion in revenue, with mainstream labels accounting for

67.5 percent of the total and indie labels and unsigned artists accounting for the remaining 32.5 percent (Houghton 2020). These unsigned DIY artists are the market's fastest-growing segment, with \$873 million in revenue in 2019, or 4.1 percent of the total, compared to 1.7 percent in 2015 (Houghton 2020, para. 1, 4, 5.). In 2022, global music revenue was \$31.2 billion, while the indie labels plus unsigned independent artists generated \$10.8 billion in music revenue, already higher than the \$9.2 billion generated by Universal Records Group, and reaching an overall market share of 34.6 percent, higher than the 34 percent in 2021 (Stassen 2023, para.4, 20). Unsigned independent artists generated \$1.78 billion in revenue, representing 5.7 percent of the global music market in 2022 (para. 23, 24). In the same year there were 9 million artists on Spotify, at least 4.3 million of them unsigned (Music Business Worldwide, 2023), uploading music through services such as DistroKid, TuneCore, and CD Baby. In other words, since 2017, there has been an increase in the number of independent artists in the music streaming market.

New Gatekeepers, New Assistants

The above factors have shaped the new connotation of indie music in the twenty-first century, transforming from a rebellious subculture and democratic DIY culture to an entrepreneurial, new "DIY" music business. As the current platform-dominated internet constitutes the infrastructure of the new paradigm, more and more artists are becoming self-employed entrepreneurs, relying on streaming platforms and social media to manage access, communication, and connection with fans and listeners. However, this creates new expectations for the self-management of artists and the depoliticization of cultural actors. For example, the DIY movement of the past was about demystifying cultural production, but today, artists, whether famous or not, must commodify "everyday communication." According to Nancy Baym, this is a "new mystification" based on a "direct" connection between fan and artist (Baym 2018, 9). Ellis Jones also noted that the new "DIY" music business today is articulated with an increasingly prominent neoliberal discourse and a widespread skepticism about "alternative" music as a viable political project (Jones 2021, 3–4), which undermines many aspects of the political potential of DIY music.

As several researchers have noted, the platformization of cultural production (Nieborg and Poell 2018) has introduced new constraints, such as the emergence of new gatekeepers. Music streaming platforms, which recommend music through algorithms, curated playlists, and online PR, have had a significant impact on

the visibility and success of DIY artists (Bonini and Gandini 2019; Frenneaux 2023, 3; Krueger [2019] 2021, 259). In a platform-centric infrastructure, artists grapple with reaching audiences due to an unpredictable algorithmic environment and the need for cultural and economic capital to withstand the fierce market competition. It is difficult for most artists to make a living from digital streaming. According to a survey conducted in the UK, only 0.4 percent of artists earn more than £10,000 a year from streaming (Hesmondhalgh et al. 2021), while Spotify states that only 57,000 artists earned more than \$10,000 in 2022 (Music Business Worldwide 2023). Compared to the 9 million artists on the platform, this accounts for only 0.6 percent. In other words, the emergence of “platform capitalism” has weakened the independent meaning of “DIY” (Jones 2021, 137). Today’s DIY punk labels use platforms like Spotify, Apple Music, and Instagram to promote their releases, just like major label artists such as Taylor Swift. The emergence of new gatekeepers also poses challenges for the ethics and discourse of the DIY music community, as the hegemony of the “old music corporations” has not disappeared. According to Hodgson (2021) and deWaard, Fauteux and Selman (2022), the major labels still influence Spotify’s decisions due to their shareholdings. With digital platforms’ monopoly of attention and the possession of data and analysis tools, DIY artists also need to adopt more strategies to obtain different resources and break through these limitations.

At the same time, globalized competition has led governments to join the paradigm shift of the popular music industry. For example, the relationship between the UK state and popular music has undergone a historical transformation (Cloonan 2007, 2016; Klein 2023; Street 2022, 29–30). It had shifted from an early authoritarian regulatory role to a promotional government in the late 1990s, successfully making Britpop a global popular culture. The policy of popular music has changed from the art field to the cultural economy and creative industries. In the twenty-first century, the government has even become the *new assistant*, actively helping the local music industry score and win. Popular music is evaluated in commercial terms, and governments increasingly subsidize music events to promote a city’s tourism benefits and global music city image (Frith et al. 2021, 57–9; Taylor 2022, 316).

Since the 2010s, several affluent countries around the world have joined this promotional government bandwagon. Countries like Australia, Sweden, Spain, and Taiwan use public funds to cultivate local music talent, promote domestic music exports, and assist the local popular music industry (Hogan 2017; Homan 2022a; Sutherland 2022). Some popular music policies initially mainly protected

local music and cultural products from being overwhelmed by imports. Later, many countries began to implement popular music subsidy policies to pursue the economic benefits of music as a cultural industry or to compete for soft power in the global cultural market by exporting music (Homan 2022b, 111). Under the influence of this global promotional ethos, public policies have subsidized music recordings, funded overseas tours, and generated creative marketing. In the following section, I will further substantiate my argument that government subsidies for popular music have fueled the rise of the new DIY music paradigm in the twenty-first century. I'll focus on Taiwan as a case study.

Indie Music and DIY Careers in Taiwan: Early 2000s to 2010s

In the 1990s, Taiwan's indie music scene remained an alternative niche, known as "underground music," while the mainstream pop music market thrived. Despite its population of only 23 million, Taiwan experienced a booming popular music industry that decade. By 1997, it had become the second-largest record market in Asia and the thirteenth-largest globally, with physical record sales amounting to 12.3 billion Taiwan dollars (about US\$410 million) (Jian 2018, 225). Taiwan's Mandopop production, influential across China's 1.3 billion population (Moskowitz 2010; Otmazgin 2016), dominated the global market for Chinese-language pop music, marking it as the golden age of Taiwan's record market. However, the initial indie rock bands gradually emerged outside of the mainstream through underground culture and its rebellious image. As martial law was lifted in 1987 and the famous "Wild Lily Student Movement" took place in 1990, leading to the democratization of politics, many original rock bands and youth groups pursuing critical subcultures appeared on university campuses and bars on the city's edge. University students published underground press and comics through their student clubs. Many of them were also interested in noise, experimental music, and avant-garde art, with some forming new punk bands in Taipei and Taichung, creating a localized original punk scene in Taiwan (Jian 2018, 233; Jian 2021). These punk rock bands, such as LTK Commune (濁水溪公社) and Anarchy In Taiwan (無政府), absorbed the punk movement and culture of the UK and the United States but added their own original and rebellious spirit.

Underground bands still went through independent or small record labels to record and release their music at that time. Even iconic bands such as LTK

Commune, Anarchy In Taiwan, and Ladybug (瓢蟲) were early on distributed by commercial labels like Friendly Dog Music Productions and the legendary label Crystal Records in their initial career stage. Since then, the public has gradually recognized that some alternative music is from the underground music circle, those alternative rock bands active between 1990 and 2000, known as “underground bands” (Jian 2013, 2017). Notably, some musicians and bands from the underground music scene garnered attention and secured contracts with major labels in Taiwan, effectively breaking into the mainstream music market. Examples include Wu Bai and China Blue in the 1990s and Mayday in the late 1990s. These acts have achieved significant success in the music industry, gaining widespread popularity throughout Taiwan and mainland China. Other indie bands tried to expand their market abroad. Ladybug, the first female punk band, organized a DIY tour of the United States in 1998 through Crystal Records. At the same time, the black metal band Chthonic, whose music describes the history and identity of postcolonial Taiwan, began to break into the Japanese, US and European niche markets.

However, like the global recording industry, Taiwan's mainstream music industry went downhill at the turn of the twenty-first century. Taiwan's physical record sales experienced a fifteen-year decline, leaving only NT\$1.6 billion (about US\$0.5 billion) in 2014 (Ministry of Culture 2016, 23). Major record labels wanted to invest in some of the emerging independent bands at the time, but most failed. By the early 2000s, Taiwan's new generation of indie bands were taking advantage of the emerging internet and low-cost digital technology to open up a new DIY route for independent music. In the same period, four indie-focused festivals emerged in Taiwan, including Spring Scream, Formoz Festival, Ho-hai-yan Music Festival, and Migration Music Festival, which focuses on folk and world music. The latter two are supported by local government and public sector funding. Due to these festivals, “indie music” has gradually become the favorite music subculture of young people in Taiwan (Giang-Giang, 2017). In 2006, singer-songwriter Deserts Chang and the band Sodagreen entered the mainstream market after signing with a mainstream and independent label. In addition to music festivals, a variety of “live houses,” live venues with a capacity of one hundred to one thousand people, also flourished in major cities such as Taipei and Kaohsiung. There were four famous venues in Taipei (Jian 2016)—Underworld, Witch House, Riverside, and The Wall—that helped make the attendance of live performances become an urban consumer trend (Chang 2009, 44–8). In terms of record sales, the line between mainstream music and indie

music has become increasingly blurred. While famous mainstream artists in the 1990s could sell up to a million records, by 2010 or so, this number had shrunk to 30,000–50,000, whereas famous indie artists could sell 10,000 or even 30,000 records (Chiang 2019). By 2015, more than twenty annual festivals had been established in Taiwan, and indie music, formerly only active in underground and niche venues, has become known to the public as a result.

From Underground Music to Indie Music DIY Career

Compared to other cities, Taipei is often regarded as the newest indie music capital in Asia (Ter 2013; Feola 2017). Empowered by the internet, the young generation of underground musicians can conveniently dig into international music culture and reach out to indie musicians and fans worldwide with similar musical and subcultural preferences. In addition to the American, British, and European influences of the past, there are also more indie rock subcultures from Japan and other Asian regions. The 2010s became a time of massive absorption of foreign cultures and music. Rock, punk, noise, experimental, hip-hop, post-punk, and other genres, as well as Japanese subcultures such as manga, anime, and video games were all being explored through online P2P file sharing. Cultural media like the *Pots Weekly* or the magazine *ARTCO* (ARTCO 2005), which continue to introduce European and American punk culture and diversified art information, cultivated the growth of local subcultural scenes.

The growth of indie in the 2010s was facilitated by the dramatic drop in recording and producing CDs after 2005. Local DIY entrepreneurship became widespread, with more and more bands and aspiring musicians recording, producing, and distributing their music without signing with a major label or needing large amounts of capital. Table 6.1 illustrates the cost differences between mainstream and independent music in Taiwan around 2010, especially regarding production costs and number of releases (Jian 2013, 106).¹ At that time, the production cost of a mainstream label album was around NT\$2–NT\$5 million (about US\$66,000–\$166,000), while independent music could be produced for as little as NT\$100,000–NT\$200,000 (about US\$3,300–\$6,600), or even less than NT\$100,000 for some. Meanwhile, mainstream record labels are

¹ Table 6.1 in the original article (Jian 2013) combines data from the author's 2002 doctoral study on major labels and a 2010–12 study on indie labels.

Table 6.1 Comparison of Major Labels and Independent Music Production

Cost (NTD) / Release Numbers	Major Labels	Indie Music	
		Independent Label Support	DIY Artists
Album production cost	2000,000~5000,000 (\$66,000–166,000)	250,000~500,000 (\$8,300~16,600)	100,000~200,000 (\$3,300–6,600)
Promotion cost	3000,000~30,000,000 (\$100,000~1,000,000)	500,000 or less (\$16,600 or less)	Thousands, or less than ten thousand dollars.
Average number of albums published in a year	700~800	100~150	

Source: Jian (2013, 106).

obsessed with high media promotion costs, and the cost of creating a star artist can be as high as NT\$30 million (about US\$1 million). However, the budget for indie bands can be as low as zero dollars. They only produce promotional content on their websites and social media for self-marketing, and do not spend any money on mainstream media exposure at all. Around 2010, indie bands released 100–150 albums yearly, contrasting with the mainstream's 700–800. This prolific output, part of the contemporary indie music scene, reflects what I have termed the “politics of production” (Jian 2013). It highlights indie music's ability to compete with the mainstream through DIY methods and low-cost production, while asserting its unique voice.

In addition, the rise of the DIY ethos around 2010 also led to an emerging subcultural career development within indie music scenes (Jian 2013, 2018). Many individuals pursued their career in a music subculture-related business, including independent record labels, art and fashion design, photography, sound engineering, visual or light design, DJing, and the like. The most famous practitioner of DIY ethics is the independent band Touming Magazine (透明雜誌), founded in 2006. Between 2007 and 2016, Touming Magazine and fellow bands organized many DIY events, held in informal spaces with cheap tickets known as Taipei's “smart punk” scene (Jian 2018, 233). They set up DIY labels, published zines, and produced and released their own albums. Their ideas are straightforward, as “everything we do is just to record ourselves.”² They chatted

² The quotes here and after, if not a specific interview, are part of the typical discourse that was observed in my long-term field study from 2010 to 2024.

with fans on BBS websites and created blogs to share music and subcultural preferences. They always encouraged their audience by saying “go, form your band, make your zine. We want to see and hear your work as well.” Around 2010, many Taiwanese bands started their own DIY labels, such as Changin Records, Psycho Youth Records, and 22 Records. The independent record store Waiting Room was founded in 2010, and famous DIY gigs like “You & Me,” “Social Speech,” the studio show “Basement Exchange,” and “Friend not Fan” were held occasionally in the 2010s.

Between 2008 and 2013, this DIY subculture expanded in Taipei’s Gongguan and Shida districts. This area is home to some of the most famous universities in Taiwan and a significant number of international students and foreigners. The Wall and Riverside, among the four major live houses, began to establish their own indie music careers with brand awareness. For example, a small shopping street has been formed in the underground space of The Wall, including the famous White Wabbit Records, The Ball music classroom, a corner bar, and a tattoo shop. In the area that surrounds the National Normal University, more emerging DIY independent labels have been established, such as Airhead, Seed Toss, 2manyminds, and Big Romantic Records. New independent record and bookstores, punk and vintage clothing stores, curry restaurants with underground performance spaces, and alternative comic shops were established in the area. The scene is filled with various international subcultures, music and vinyl, skateboarding and zines, alternative comics, self-publishing illustrations, and photography books. Some individuals pursue their subcultural passions alongside day jobs or side gigs, often as “slashies” or independent entrepreneurs. Some independent music event organizers prioritize personal taste over profits, such as “using all the hard-earned money from work to organize events” or facing post-event debt. Despite financial challenges, practitioners have spawned various creative ventures, forming a robust subcultural network in Taiwan’s indie music scene. This groundwork supports the transition of independent music into a viable career.

The Birth of “Subsydism”: 2007–

During the DIY influx of 2007, Taiwan’s government became a prominent “new assistant” with its subsidy policy. The initial policy objective was similar

to various countries around the world (Homan 2022b; Jian and Zheng 2012; Sutherland 2022b), with a desire to support budding independent bands with limited resources. However, it soon joined the international trend of developing creative industries, utilizing larger public budgets and subsidies to bolster Taiwan's popular music industry, boost music exports, and enhance Taiwan's national and cultural branding, thereby creating cultural and economic benefits. Consequently, the era of "comprehensive subsidy for popular music" in Taiwan began around 2010 (Jian 2019). This is elaborated here as the birth of "subsidyism" (補助主義).

The development of subsidyism can be divided into three stages. The first stage is the initial subsidy period from 2007 to 2009. At that time, the Information Bureau headed Taiwan's popular music sector. Beginning in 2007, following lobbying efforts by musicians, the Information Bureau attempted to subsidize independent bands for recording their works. This policy was well-received, with over 200 unsigned independent bands applying each year and 15–20 bands being funded annually for NT\$150,000–NT\$500,000 (about US\$5,000–\$16,000) (Jian and Zheng 2012, 197). The second stage is the subsidy creation period spanning 2010 to 2014. In 2010, Taiwan's government announced a policy to develop "the cultural and creative industries," proposing a subsidy program for the content industry, encompassing television, film, and popular music as the three flagship industries. In the pop music sector, the "Popular Music Industry Development Action Program" comprised a five-year (2010–14) budget of NT\$2.135 billion (approximately US\$71.66 million) aimed at fostering the local music industry's development and promoting its export (Jian and Zheng 2012). In 2012, Taiwan's Ministry of Culture was officially established during a government department reorganization. The Bureau of Audiovisual and Music Industry Development (BAMID) was set up under the Ministry of Culture to promote the popular music industry in the long term. Over these five years, the government invested an average of about NT\$400 million (approximately US\$13.33 million) per year in subsidizing the development of the local popular music industry, benefiting not only emerging independent music sectors but also the mainstream music industry.

The third stage is the stable subsidy period, which has normalized Taiwan's popular music subsidy policy since 2015. After the conclusion of the previous five-year plan, the Ministry of Culture announced the second phase of the "Popular Music Industry Development Flagship Program" without specifying

the total budget, only announcing different subsidy projects annually.³ The content and amount of the budget have remained consistent with previous practices. The list and number of subsidies are also available as public data from the government. According to this public information, the government budget during 2014–19 is similar to the second stage, at NT\$300– NT\$400 million (about US\$10– US\$13 million) per year (Jian 2019). After 2019, the amount and number of subsidies continue to be organized and have become a regular resource. The subsidy budget is divided into two categories: grants and procurement (also known as “tenders”). Grant cases involve the government’s acceptance of applications for funding from local musicians or music companies for recording and marketing costs, as well as for producing creative cross-media content. Procurement/tender cases are government-initiated projects in which qualified companies or organizers submit bids for talent cultivation, music festivals, and music award ceremonies,⁴ as well as for selecting artists to perform in renowned international music festivals each year. For the latest five-year period of 2018–23, Taiwan’s government invested NT\$320– NT\$522 million (about US\$10– US\$17 million) per year (Figure 6.1) in subsidizing the music industry. As Figure 6.1 shows, the budget shares of grants and tenders are very close, although the total value of grants is slightly higher than the total value of tenders. Similar to the Pitchfork report, Taiwan’s annual funding amount is approximately US\$16.6 million (Hogan 2017), which is similar to this study’s estimate.

Since 2010, Taiwan’s government has been sending artists to perform at internationally renowned music festivals year after year. Artists have been supported through the annual procurement program for festivals in numerous countries, including MiDEM, Glastonbury, SXSW, and Fuji Rock (Jian and Zheng 2012, 198; Lin and Tsai 2020). These promotional activities are the so-called showcase model (Homan 2022, 115), which helps local artists to be recognized by international music buyers for commercial music festivals. Since 2016, the annual Summer Stage Festival in New York’s Central Park has also presented a program called “Taiwanese Waves,” which was initiated and funded

³ There are six projects in the grant category, namely: Cultivation of Talents, Recording Production, Brand and Artist Development, Marketing Promotion, Cross-Media Production, and Cross-Platform Development.

⁴ For example, Taiwan’s famous Golden Melody Awards (GMA) and Golden Indie Melody Awards (GIMA) are officially organized but hosted by nongovernment television media and event companies.

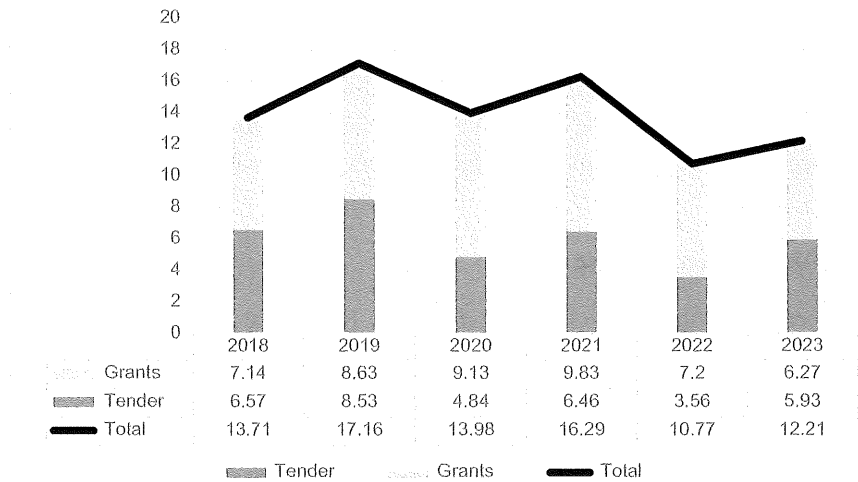


Figure 6.1 Taiwan's popular music subsidy budget (2018–23). Unit: US dollar (million).

by Taiwanese curator Mia, with continued funding support from Taiwan's government (BIOS Monthly 2018; Jian 2020, 225; Taiwan Beats 2023).

In addition to subsidies from the Ministry of Culture, the municipal governments of Taipei, Taichung, Kaohsiung, and other cities also have local subsidy policies. For example, they subsidize grassroots live venues or regularly invite bids to host local music festivals. In 2019, following the successful example of South Korea's Korean Creative Content Agency (KOCCA), the Taiwan Creative Content Agency (TAICCA) was established. This special corporation brings private and government funds together to promote market-oriented cultural content development and production. By means of investment rather than subsidies, TAICCA's investment targets also include independent musicians and bands with commercial or international market potential. For example, TAICCA invested in the European and US tours of the rising Taiwanese indie band Sunset Rollercoaster, including their tour documentary. In addition, Taiwan Beats, an online medium supported through the procurement program, continues to introduce Taiwanese artists and bands in English, Chinese, and Japanese, as well as every band's international showcase performance. By 2024, Taiwan's popular music policy centered on subsidies had been in place for more than fifteen years, with an investment of about NT\$5 billion (\$1.6 billion), from its inception to its stabilization. We should add the two landmark buildings, Taipei

Music Center (TMC) and Kaohsiung Music Center (KMC), both completed and opened in 2020. The total investment in constructing the two music centers was nearly NT\$10 billion (\$3.2 billion) (Jian and Zheng 2012, 194). In other words, from software to hardware, the government has invested considerable public resources in subsidizing and promoting Taiwan's music industry.

The Funding Landscape

The more than fifteen years of subsidy policy has had a profound impact on Taiwan's indie music. First, it has helped the growth and competitiveness of local indie music. In Table 6.1, we can already see the competitiveness of independent music in terms of production and promotion costs. According to the previous survey, the number of pop albums released in Taiwan was 890 in 2007 and 785 in 2008 (Jian 2013, 105). Since 2007, more than 200 indie bands and artists have applied for subsidies every year, and the release number of indie music albums can reach almost a quarter of the mainstream total (105). Currently, the total number of artists that received funding from 2018 to 2023 is 655, of which 171 artists received funding more than twice, and 25 artists received funding five or more times within five years.⁵ In other words, it is the government's grant funding that has contributed considerable assistance in developing both Taiwan's indie music as well as the general music industry.

In addition, after 2015 the new generation of indie music has reentered the mainstream market. Bands that received recording grants, such as Fire Ex., No Party For Cao Dong, and EggPlant Egg, have enjoyed broad commercial success. For example, No Party For Cao Dong, founded in 2012, sold more than 30,000 copies of its first DIY album in 2016 and won three Golden Melody Awards in 2017, including Best New Artist, Best Band, and Best Song of the Year, announcing the rise of a new wave of Taiwan's indie music. Tickets for their concerts are always sold out in seconds, jokingly referred to as "No TICKETS for Cao Dong" (Jian 2020, 217), and tickets for their 10,000-person concert in 2021 also sold out in an instant (Ye 2021). Meanwhile, Taiwan's emerging rock festivals in the latest decade such as the Megaport Festival, Vagabond Festival,

⁵ This study was conducted from August 2023 to early 2024 on the website of the Ministry of Culture's Bureau of Film, Television, and Popular Music Industry (https://www.bamid.gov.tw/submenu_204.html), and the Ministry of Culture's Award and Grant Management System (<https://grants.moc.gov.tw/Web/index.jsp>), to collect information on all announced grant cases and procurement cases from 2018 to 2023.

and Emerge FEST have featured mainly indie music and bands. The subsidies have also enabled many bands to start international tours, outside of the government showcase. Sunset Rollercoaster, Elephant Gym, and Deca Joins have all recorded their performances for the YouTube channel Audiotree Live in the United States and toured North America, Europe, and East Asia with the help of various subsidies. Sunset Rollercoaster, founded in 2009, is the most successful case among them. With vintage adult-oriented rock (AOR) and all-English lyrics, Sunset Rollercoaster has been successful in Japan, Korea, Indonesia, and other Asian markets since 2018 and gradually expanded to North America and Europe (Amirio, 2018; Basbas 2021). In 2019, Sunset Rollercoaster was invited to Japan's Fuji Rock Festival without receiving funding from Taiwan's government. In 2021, they even received the Golden Melody Award for "Best Band" in Taiwan (Zhang 2022), and in 2023, they became the first Taiwanese artists to perform at Coachella in the United States (Liu 2023). Therefore, with the assistance of government subsidies, more indie bands can break into the mainstream market, receive music awards, and can afford overseas tours.

Government subsidies, paradoxically, have become the "new default" for Taiwan's music industry. Over the years, a unique funding landscape has been formed. There are various subsidy programs for every aspect of the music industry, and more and more companies rely on subsidy applications to survive. Companies and musicians' associations, which had been hard hit by the decline in record sales at the turn of the century, have been revitalized. The pursuit and execution of government grants and tenders has become an important source of funding and a major business for music companies of all scales. Gradually, the subsidized landscape has given rise to a mentality of "subsidyism," where musicians and the music industry are overly reliant on governmental aid. For example, some musicians and companies build the subsidy into their business model. They will not launch new plans for musical productions, events, or promotions unless there is a grant. Some high school students in rehearsal rooms started to ask their seniors how to write a grant before they even formed a band.⁶ When music business owners encounter problems such as noise issues at live houses or outdated recording studio equipment, the government uses subsidies as a solution. I have written and contributed several studies and media articles that review Taiwan's music subsidies (Jian 2012, 2017, 2019; Jian and

⁶ All the observations and talks quoted here and thereafter are from the author's field study conducted between 2020 and early 2024.

Zheng 2012), focusing on problems like excessive concentration of resources in a few groups, destruction of market mechanisms and the destruction of the independence of music culture. In recent years, more and more music festivals and academic symposia have discussed the issue of Taiwan's subsidy policy as well. In 2023, I was invited to host a forum organized by CSA (Cultural Studies Association, Taiwan), the topic title questioning directly, "Is indie music really "independent?" (Jian et al. 2023). However, when reviewing the government's subsidy policy, musicians still think that the government needs to do more. In the early days, some senior musicians thought that a subsidy of only NT\$300,000 for an album was too little, so the government introduced the "production upgrades" scheme, which allowed them to apply for production funding of NT\$2 million for an album. There are also those who ask, "even if we have recorded the works, what then?"⁷ The speaker means the government should continue to assist the bands or force it to do marketing and promotion.

As a result, within the funding landscape, many bands that had risen to prominence in the early days with their DIY spirit began to waver in their stance. Some bands started applying for grants after years of resistance because they were determined to expand their music business and pursue a professional career where they could make a living from their music. Some bands worry that if they do not get subsidies, they will have to raise money to record their own works and will "lose at the starting line" compared with other bands that have received subsidies. Some musicians who have received subsidies have even started taking up part-time jobs to "write subsidy cases for other bands" and assist in various administrative and interviewing tasks. Many music recordings and releases are timed to coincide with grant applications and closing reports, and at the end of each year, many subsidized albums are released. Even ten years ago "writing bids, filling out applications, and writing closing reports" had already become a more important skill than the content of the music (Jian and Zheng 2012, 203). Reflecting on the funding landscape in 2024, it is almost as if "subsidyism" has been "colonizing the indies" (Mulholland 2008, 3) for a long time.

⁷ Another forum was held at the LUC Fest on November 4, 2023, in Tainan city. I was invited as the host as well, topic of this forum was "15 Years of Popular Music Policy: How Artists Have Been Impacted" (倒轉十五年：流行音樂政策如何影響台灣音樂人音樂補助政策). Check the program on the website: <https://www.lucfest.com/en/conference/15-years-of-popular-music-policy-how-artists-have-been-impacted/>.

The New Wave of Entrepreneurialism: 2016–

Around 2015 and 2016, Taiwan's indie music scene welcomed a new wave of entrepreneurialism. With the help of government subsidies, entrepreneurship was no longer the DIY resistance culture of the early days but rather embraced the professionalization of the music business. Personal music interests turned into formal careers, and indie music increasingly became an industry in Taiwan. Since then, many indie bands have set up their own companies. A veteran indie musician and co-owner of a well-known music studio in Taipei told me: "It's true, most independent bands set up their own companies because they want to apply for subsidies."⁸ Several famous indie bands, such as Fire Ex., No Party For Cao Dong, EggPlantEgg, Elephant Gym, Sorry Youth, and Sunset Rollercoaster, have successively established their own companies over the past few years. Initially, they just hired themselves, and then gradually expanded and became small- and medium-sized businesses with five to ten employees. At the same time, more and more small companies and individual studios emerged in the scene. Some are music festival companies, others independent agents, organizers, show buyers, or workers in sound engineering, lighting, and visual and digital art design. This trend formed an expanding indie music industry and networks of music project workers in Taiwan. Besides the Ministry of Culture, grants are also available from the Ministry of Education's Youth Dream Program and the Ministry of Economic Affairs' Youth Entrepreneurship Grant. 44Bit, an electronic music promoter in Tainan, started its business in 2013 because it received NT\$500,000 from the "Youth Dream Program." They mocked themselves as "being forced by the Ministry of Education to open a store." However, the company did survive and became both a brunch café and a successful electronic music event organizer, with the first half of its activities being private business endeavors and the other half applying for government bids. With a tongue-in-cheek attitude they admit being familiar with writing bids because "it is very much like writing a master's thesis."⁹

The new wave of entrepreneurialism is also related to the career stage. Many bands that formed around 2005 decided to start their own business in 2015 or 2016 when they had already been in the business for ten years and were in their thirties. Elephant Gym guitarist Tell Chang said: "I think the biggest

⁸ Tang-Hsien Huang, interview by author, Chia-yi, December 11, 2022.

⁹ Alice Yang, interview by author, Tainan, June 6, 2023.

advantage [of setting up a company] is that I can explain to my family what I am doing, and it lets your family know that it seems like you are starting your own business, and it makes sense if you don't make much money otherwise" (quoted in Chiang 2019). Compared to the past, when music activities were regarded as fun and amateur activities, entrepreneurship has allowed musicians to present their career to their family more seriously, which relates to the Chinese value of gaining recognition and affirmation from parents and elders. Nevertheless, music entrepreneurship is a form of self-fulfillment that comes with risks. As Hesmondhalgh and Baker (2008, 102) point out, there is always an internalized "self-actualization" mechanism in the media industry, whereby pleasure, self-expression, and self-entrepreneurship are internalized as intrinsic values. This process of subjectivation explains the struggles of independent musicians, like entrepreneurialism under neoliberal values, which emphasizes individuality and self-realization even in the face of control and exploitation (McRobbie 2002, 157). The band For Winners, formed by several indie music veterans, released a song titled "26th GMA Blue" in 2016. The song's lyrics describe the atmosphere and personal feelings at the time: "Another friend has been shortlisted for the Golden Melody Awards / He is glowing after being shortlisted for the Golden Melody Awards / The Golden Melody Awards does not mean much to me / But I cannot help but be jealous." Though it is a self-mocking punk folk song, it still captures the atmosphere of the indie music scene in the mid-2010s. More and more indie artists were moving toward the commercial system and mainstream culture, and they could be rewarded for it. Some indie artists asked themselves, should they enter the contest and walk the red carpet of glory? A generation growing up in a rebellious DIY culture began to struggle and falter.

Streaming and the New Gatekeepers

In addition to subsidies, music streaming platforms have become mainstream channels since 2016 and have helped create a wave of independent music start-ups. As Ellis Jones suggests, the DIY distribution of independent music is now completely "platformized" (Jones 2021, 123), and streaming is more of an internationalized business platform than the BBS websites and P2P software of the early 2000s. The case of Sunset Rollercoaster illustrates the assistance of the streaming platforms in reaching the international market. Sunset Rollercoaster writes songs in English which have been able to break the geographic and linguistic limitations and reach an international audience more than ever.

Through algorithmic mechanisms, Sunset Rollercoaster and artists of similar genres could be automatically recommended one after the other. They are more accepted and likely to spread among the international streaming community, mainly the young generation. The front man Kuo-Hung Tseng said their music career started to expand internationally at a rapid pace in 2018:

If it were not for streaming ... there would not have been any of these things. It is the lowest barriers ... You just need to know the name, and when you type it in, algorithms recommend a lot of music similar to yours ... the need to comb through the history is getting lower and lower.¹⁰

After restrictions around the COVID-19 outbreak were lifted in 2022 and 2023, Sunset Rollercoaster toured Europe and the United States, enjoying the international audience brought by streaming. After performing at Coachella in 2023, they were invited to record a Spotify Singles on their US tour, which has proven that their music can transcend borders.

However, streaming platforms have become the new gatekeepers. The number of monthly listeners on Spotify is already an important industry statistic for local music festivals in Taiwan and for international music performance invitations. When indie bands want to arrange international tours, show buyers or promoters worldwide will ask for Spotify's backend data as a reference.¹¹ Streaming data has become the basis for estimating a show's box office and paving the "ladder of the industry chain" that leads indie bands to move from small venues to medium-sized and then large ones (Zhang 2022). The end goal is to perform at music festivals with 10,000 attendees. At the same time, the distribution agent is another gatekeeper. In Taiwan, any distribution on any music platform has to go through a distributor, such as the three major international labels, the international distributors such as Believe, or the local distributor companies such as Packer, Soundscape, or Rock Mobile. Each of these local distributors has a parent company, including the indie music websites, media, festival and venue chains corporation, streaming platforms, and local major labels. However, many indie musicians without professional agents often sign unreasonable contracts without knowing what they are getting into, leading to other disputes.¹² It makes

¹⁰ Kuo-Hung Tseng, interview by author, Taipei, January 18, 2024.

¹¹ Kuo-Hung Tseng, interview by author, Taipei, January 18, 2024.

¹² The cases provided by a lawyer who is also a well-known music event promoter from my field study.

“platformized DIY” more a process of being absorbed by large corporations and the established music industry groups.

Last, the music streaming platforms have also had a “platformization” impact on music production and promotion. Many independent musicians have realized that releasing singles is more important than releasing albums. Artists collaborate more often to increase each other’s traffic on platforms. The concept and artistry of “albums” are no longer emphasized, but the editorial playlists and algorithm recommendations on the platform dominate the way listeners listen to music. The indie musicians need to put more energy in studying how to adapt to the release and promotion logic of the platform, such as arranging artist information, artist playlists, and the like. Some people have also begun to pay more attention to maintaining a friendly relationship with platform editors and providing rich visual needs such as short videos or music videos. All above reveal the new hegemony of the music industry in the age of streaming.

Conclusion

In March 2024, a DIY punk community organized the “DIY or Die Vol.3” event under a viaduct outside Taipei.¹³ In the cold wind, punk bands from Okinawa, local punk bands, and Indonesian migrant bands from Taiwan played enthusiastically (see Figure 6.2). There were booths with various zines, comics, indie records, tattoos, handmade food, haircuts, and massages. Posters and Free Palestine flyers were produced to publicize why we need to fight the war. The event was free, but donations were freely accepted, and hundreds of people gathered from Hong Kong, Japan, and different cities of Taiwan. The event was organized by local punk and resistant culture collective Suckglue Boys and Halfway Café, and is dedicated to promoting anti-war, anti-capitalist, and anti-discrimination movements. However, this DIY culture, along with the indie music, punk bands, and the resistance culture associated with it, is no longer the “indie music” recognized by the media and the general public today.

There are examples of failed independent music ventures that I am familiar with. Some aforementioned indie record labels that could not profit from

¹³ The event FB page in three languages, <https://www.facebook.com/events/2712052892284412/>.

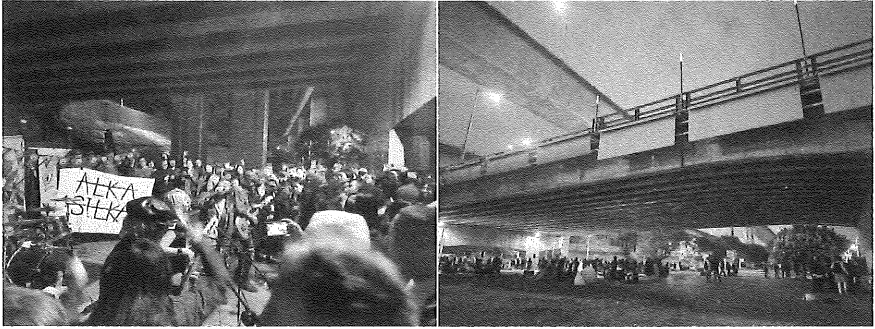


Figure 6.2 DIY or DIE Vol. 3, Taipei (March 9, 2024). Photo by Miaojun Jian.

their records or live events had to close around 2020. Some people had to return to their day jobs, to be an employee of another company again. Some of these individuals realized that they were not good at business management. In other words, entrepreneurship is about self-realization, but it is only after starting a business that one faces the test of the market and the path of self-management. Looking back at the development of independent music in Taiwan in the twenty-first century, we can see a gradual progression from a culture of DIY resistance to embracing government-subsidized resources and becoming a new entrepreneurial music business. Similarly to developments worldwide, the internet, digital technology, and streaming platforms have appeared to democratize the old music industry, and the government's subsidy policy has brought even greater assistance to the development of indie music in Taiwan. This has happened while the "platformized DIY" of contemporary indie music, the new gatekeepers of the current music streaming regime, have shaped the new DIY culture of indie music. The meaning of "independence" now is more ambiguous and contradictory.

In summary, Taiwan's "indie music" in the twenty-first century seems like a landscape of democratized and subsidized music entrepreneurship, leading to the rise of numerous small and individual DIY businesses. Despite the hope this brings, most musicians and practitioners are still grappling with how to survive amid circuits of funding, bidding, precarity, self-management, and competition. Criticism of politics and rebellion against the corporate regime have once again become an underground culture, retreating to the edges of the city. The intertwined hegemonies of capital, digital platforms, and the music industry still present challenges that indie music entrepreneurs in Taiwan and worldwide continue to face.

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