THE PACK MUSIC CO-OPERATIVE LTD

Music from the Ground Up

The case for a co-operative streaming economy in Australia.

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Revised edition, 2026

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We acknowledge the Traditional Custodians of the lands on which we live, learn and create, and offer our respect and friendship to Elders past, present and emerging. Sovereignty was never ceded. Always was, always will be, Aboriginal land.

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PREFACE

Why we wrote this, and who it is for.

The Pack Music Co-operative was founded in 2021 after four previous years of research and development, with the purpose of answering one question: what would it look like if the infrastructure for distributing music were owned by the people who make it?

We had watched the streaming decade unfold. We had seen the promises — democratisation, global reach, the death of gatekeeping — meet the reality: independent musicians earning less from their recordings than at any point in the modern era, while the platforms distributing their work generated billions in revenue and their founders accumulated personal fortunes measured in multiple billions of dollars.

What we now know is that the gap between the promise and the outcome was not a market inefficiency waiting for correction. It was the intended output of a business model designed to extract value from creative labour and redistribute it to capital.

This paper is not primarily a critique of streaming platforms, though they are examined critically here. It is a case for a different approach — one that is foundaitonally, not rhetorically, aligned with the interests of the artists it is designed to serve. It draws together the research, analysis, and advocacy work that has informed The Pack's development over nearly a decade, alongside the best available evidence on the economics of streaming, the mental health consequences of artist precarity, the live music infrastructure crisis in Western Australia, and the cooperative models that offer an alternative to the current arrangement.

It is written for anyone who seeks to understand why The Pack exists, what problem it is solving, and why that problem is too serious and too entrenched to be addressed by incremental reforms to a model that was not designed with artists' interests in mind.

The arguments here are not new. The Pack has been making versions of them since 2016. Government and industry have been slower to understand and react. But what is new is the urgency, because the conditions facing independent musicians in 2026 are worse now than they were in 2016, and the policy response has moved at a pace that reflects the political weight of the people most harmed.

This paper is a renewed call to action, to our governments, our industry, and our artists.

In music, we trust.

Melanie Bainbridge
Co-Founder / Executive Director, The Pack Music Co-operative · 2026

CHAPTER 1

1 The Prosperity Illusion

Platform capitalism and the music sector.

Bluntly put, the globalised music streaming economy operates on the same extractive principles as every other form of platform capitalism — and indeed, every business model predicated on the capitalist architype — that the creators of the value are not its main beneficiaries, they are merely the fuel for shareholder wealth and unfettered growth.

In music however, this reality is frequently obscured by the specifics of the industry — the romance of artistic vocation, the complexity of rights and royalties, the genuine, multidimensional difficulty of building a sustainable creative career. This makes it easy to treat the problem as unique and complicated rather than as a familiar arrangement in a new setting.

The music industry is not a special case of platform capitalism — it is a familiar one. Uber promised drivers autonomy and supplementary income; a decade of algorithmic fare cuts and contractor reclassification later, the average driver earns below minimum wage once vehicle costs are factored in, while the platform's market capitalisation exceeds $150 billion. Amazon invited small businesses onto its marketplace, harvested their sales data to identify successful products, then launched competing Amazon-branded lines and adjusted search algorithms to favour its own inventory. Instagram built creator audiences through promises of organic reach, then progressively throttled that reach to compel paid promotion — effectively charging creators to access the followers they had spent years cultivating on the platform's behalf.

YouTube monetised a generation of creators, then demonetised content without notice, shifted algorithm priorities without explanation, and introduced a subscription model that routes fees through the same pool-distribution logic that impoverishes musicians on Spotify. Airbnb professionalised its platform in ways that systematically disadvantaged the individual hosts whose participation made it worth using in the first place.

The through-line is consistent: each platform extracted value from the people whose participation made it worth using, then used accumulated scale and data advantage to progressively worsen the terms of that participation — basic enshittification. The language might change subtly by sector — flexibility, democratisation, the sharing economy, the creator economy — but the mechanism is identical, and the music industry's version of it is not more complicated than any other. It is simply more connected to an old economic order, and the language of artistic vocation has made the extraction easier to romanticise.

THE ASYMMETRY, IN ONE SENTENCE

$0.003 vs $9.9 billion

Spotify artists require millions of streams to generate income equivalent to a minimum wage, while the platform's founder has accumulated a personal fortune of approximately USD $9.9 billion — partly invested, as of 2025, in autonomous weapons technology.

The streaming prosperity narrative rests on a conflation of theoretical access with practical opportunity. Yes, any artist can upload music to major platforms and theoretically reach a global audience. This is true. What is *false* is the democratisation of success. Reaching a global audience in practice requires competing against artists with major label marketing budgets, playlist placement deals negotiated at a corporate level, algorithmic promotion tools purchased through programs like Spotify's Discovery Mode, and the accumulated streaming history that comes from decades of commercial dominance.

The platform is accessible to everyone, but the platform's discovery and recommendation infrastructure serves the interests of the artists and labels with the most leverage over its commercial relationships. These are different things. Confusing them is the central mechanism of the prosperity illusion.

The pro-rata problem

At the heart of the streaming economy's failure for independent artists is the pro-rata payment model. All subscription revenue is pooled across the platform and distributed to rights holders based on their share of total streams. This means that even a subscriber who listens exclusively to local independent music is effectively subsidising the royalties of whichever artists dominate global play counts.

The mechanism is elegantly simple and structurally unjust. It treats all listening as equivalent contributions to a shared pool, then distributes that pool according to aggregate popularity, which is itself a function of marketing investment, label relationships, and algorithmic favour rather than artistic quality or community connection. A subscriber's monthly fee does not go to the artists they listen to. It goes into a pool distributed by percentage to whomever has the most total streams, which means, in practice, the artists who already have the most resources.

While initially this might have been shrugged off as an unintended consequence, It’s now quite clear that this is a deliberate design choice that benefits the major labels, which account for the majority of the top-streamed content, and the platforms, which benefit from the lock-in effects of a model in which audiences and artists alike have no alternative distribution infrastructure of comparable reach.

Sharecropping in the digital age

The extraction is not evenly distributed, and the uneven distribution follows patterns that are familiar from other contexts. In many parts of Africa, Asia, and Latin America, streaming platform expansion has restructured local music economies in ways that concentrate revenue offshore. Australia is no different.

Radio stations and local distribution networks that directed revenue back into domestic music ecosystems have been displaced by global platforms whose royalty payments are calculated on global play-count distributions and whose revenue flows to jurisdictions with no connection to the communities whose music they are distributing.

Local artists create the music. Local communities generate the streams. The economic value created leaves the local economy entirely. The raw material is cultural rather than mineral. The extraction mechanism is algorithmic rather than physical. But the geographic flow of value is identical to historical patterns of resource extraction from peripheral territories. This is cultural colonialism.

The standard response to this framing is that streaming involves choice — i.e. that artists choose to upload their music to these platforms, and that listeners choose to direct their subscriptions into a pro-rata pool. This might be technically accurate, but it is broadly inadequate. When the dominant distribution infrastructure for recorded music is controlled by a small number of platforms whose terms are not negotiable and whose alternatives offer substantially less reach, the choice to participate is the choice between accepting the terms or accepting irrelevance. That is the structure of most choices made under conditions of significant power asymmetry. It is the reality of the major streaming services. And it's only a choice in name.

Trickle-down streaming economics

Trickle-down streaming economics, the promise that platform growth would eventually generate enough revenue to support the broader artist ecosystem, has had more than a decade to demonstrate its validity. The evidence is in. Platform revenue has grown. Per-stream royalty rates have declined. The share of streaming income going to the top fraction of rights holders has increased. Artist poverty has deepened. Wealth has not trickled down. It has concentrated upward, with the inevitability and efficiency of a system designed to produce that outcome, which is what it is. Why this is even surprising at this junction is genuinely baffling.

The most insidious element of this arrangement is not the extraction itself but the ideological work that makes it invisible or acceptable. The language of opportunity, democratisation, and creative freedom has been deployed consistently to describe a system that offers none of these things to the majority of its participants. Artists are told they should be grateful for platform access. They are told that their poverty reflects insufficient engagement with the costly promotional tools available to them. They are told that success is achievable for anyone with sufficient talent and work ethic.

This projects the failure of the system onto the individual artists it is failing. Platform capitalism has been unusually effective at this mechanism in the creative sector, precisely because the language of creative effort already contains the suggestion that suffering for one's art is ennobling rather than exploitative. This needs reframing.

PROVOCATION TO GOVERNMENT

What if Australia recognised that platform capitalism in the music sector is not a market failure to be nudged toward better behaviour, but a design choice made by exploitative corporations — and responded with the disruptive and innovative ambition that redressing design choice requires?

CALL TO ACTION

Commission an independent review of the economic relationship between major streaming platforms and Australian rights holders, with a specific mandate to assess whether pro-rata payment models are compatible with Australia's cultural sovereignty obligations — and report by 2027.

1 Spotify per-stream royalty data from the Trichordist Streaming Price Bible 2024. Daniel Ek net worth estimate from Bloomberg Billionaires Index, 2025. Prima Materia investment in Helsing (autonomous weapons) reported June 2025.

2 On streaming platform impacts in the Global South, see Dani Fikre, 'How Streaming Ate Africa's Music Economy,' Africa is a Country (2023); IFPI Global Music Report regional analysis 2025.

3 Alan B. Krueger, Rockonomics: A Backstage Tour of What the Music Industry Can Teach Us About Economics and Life (Currency, 2019).

CHAPTER 2

2 The Arithmetic of Poverty

What musicians actually earn, and why the numbers are not improving.

$14,700	<$300	10M+	<0.1%
MEDIAN ANNUAL INCOME FROM MUSIC	AVG. ANNUAL FROM STREAMING	STREAMS PER YEAR FOR MIN. WAGE	OF TRACKS REACH THAT SCALE

Sources: MEAA (2024); Trichordist Streaming Price Bible (2024); Music Australia Bass Line (2025).

The scale of the underserved

By headcount, the independent and unsigned artist population is not a niche within Australian music. It is essentially the industry. The three major labels — Universal, Sony, and Warner — control more than 90% of the annual top 100 chart share, but that dominance reflects marketing infrastructure and algorithmic leverage, not the proportion of working musicians they actually represent.

The number of major-label signed Australian artists is actually a very small fraction of the total creator population. The remaining 95% or more — the musicians captured in the MEAA survey data, the artists developing careers through live performance, the songwriters, session players, and producers working across the country — are independent, unsigned, or operating through small labels whose commercial footprint bears no resemblance to the major three.

Spotify's own data illustrates the scale of this mismatch. Of all streams generated by Australian artists on the platform, approximately half flow to independent artists — and this is on a platform whose algorithmic infrastructure systematically advantages major-label content through editorial playlist placement, Discovery Mode, and recommendation weighting. Independent artists are generating half the streams despite competing on deeply unequal terms.

But streams and income are not the same thing — and for a significant proportion of independent artists, they are not connected at all. Since 2024, Spotify has required that a track accumulate at least 1,000 streams per year before it attracts any payment whatsoever. For the long tail of independent and unsigned artists whose tracks circulate within dedicated but modest communities, this threshold means their streams register in the data and generate nothing in their accounts. The 50% stream share significantly overstates the income share it produces.

When measured by recorded music revenue, that independent share shrinks further — to roughly 30%. Of the $555 million in domestic and international recorded music sales by Australian artists documented in The Bass Line, major labels captured 70% and independents the remainder. The gap between 50% of streams and 30% of recorded music revenue is where the extraction becomes deeply visible — and even that gap understates the reality for unsigned artists operating below the payment threshold entirely.

Stream-to-income arithmetic

Platform	Per-stream rate (USD)	Streams for $1,000	Streams for min. wage
Spotify (independent)	$0.003–$0.005	**200,000–333,000**	**~10–15M**
Apple Music	≈ $0.01	**~100,000**	~5M
YouTube Music	≈ $0.002	**~500,000**	~24M
The Pack (proposed)	*User-centric, no minimum*	*Direct from listener*	*No threshold floor*

Table 2.1. Streams required to earn equivalent of Australian minimum wage (~$45,000 p.a.) by platform. Sources: Trichordist (2024); Royalty Exchange (2025).

The arithmetic compounds quickly. The vast majority of musicians must supplement their music income with other employment — and the data confirms this is exactly what is happening. Research by the MEAA in 2024 found that 49% of musicians surveyed earned less than $5,999 from the music industry during the 2023 financial year, and 64% earned $14,999 or less. Only one in five musicians derived all their income from music. Two in three were forced to take work outside the industry.

Australia's music industry generated $8.78 billion in revenue in 2023–24. Australian artists earned $860 million from their work across the entire industry — and 82% of that went to the top 25% of earners. The median music artist income was $14,700. The gap between the industry's headline figures perfectly illustrates the state of an industry structured to separate creative labour from its economic returns.

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> *42% of musicians report playing unpaid gigs. 60% are paid less than $250 per performance, despite spending up to 20 hours per week rehearsing and preparing.*
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> — MEAA Insecure Work and Poor Pay survey, 2024

The invisibility of creative labour

The economics of streaming also fail to account for the labour involved in music production. Writing, recording, mixing, mastering, marketing, distributing, and promoting music require time, money, and specialised skills.

Most independent musicians fund their releases out of pocket, with little chance of recouping costs via streaming royalties. This creates an unsustainable model where artists continually invest in their craft without assurance of return — providing an invisible cultural subsidy that props up the platform economy while hollowing out the artist base.

The contemporary independent musician is also expected to be, in addition to their creative practice, a social media manager, video producer, graphic designer, marketing strategist, data analyst, booking agent, merchandise manager, grant writer, and content creator, producing material at a frequency determined not by creative necessity but by platform algorithms whose optimal posting schedules change without notice. None of this work is paid. All of it is understood as simply what is required to have a career.

The labour involved in maintaining an online presence sufficient to satisfy algorithmic requirements can consume a significant proportion of a musician's working hours — often more than the primary creative practice itself. The industry that tells musicians they must maintain a social media presence to have a career has created a situation in which that maintenance is itself a source of the mental health crisis the industry then addresses with webinars on self-care and poorly distributed support packages.

The middle tier that streaming erased

The streaming era has not created income inequality in music. It has always existed, since labels discovered they could exploit musicians for the benefit of shareholders. But it has intensified it and extended it downward, eliminating the middle tier of semi-sustainable careers that existed, admittedly imperfectly, with its own inequities, in the era of album sales and radio.

The old model had problems, but it also sustained a category of artist who could build a career on a regional following, a loyal niche audience, a slow-developing reputation. That category has largely been eliminated by a royalty model that requires global scale to generate meaningful income, and that directs the promotional infrastructure of the platform toward the artists and labels already at that scale.

We know that the median annual income from musical activity is well below the national poverty line and less than one-third of the median full-time wage. This figure includes all music-related work: live performance, teaching, session work, recording, and the streaming income that is the subject of most current policy discussion. The streaming component of that income is, for most musicians, small enough to be a rounding error. The state of government funding and policy does not reflect or address this reality for musicians.

PROVOCATION TO GOVERNMENT

What if Australia recognised its musicians not as hobbyists or passion-led lifestyle choices, but as small creative enterprises — and extended to them the same strategic support, tax concessions, and sustainability frameworks offered to start-ups and exporters in every other knowledge industry?

CALL TO ACTION

Establish a Music Sustainability Fund with matched public-private contributions to seed user-centric royalty pilots, provide income supplementation grants structured around career longevity rather than project delivery, and develop portable entitlements enabling independent musicians to accrue superannuation across multiple engagements.

4 Music Australia, The Bass Line: Charting the Economic Contribution of Australia's Music Industry (2025). ARIA recorded music market data 2024.
5 MEAA, Insecure Work and Poor Pay Forces Musicians to Hang Up Their Instruments (2024). Trichordist Streaming Price Bible 2024.
6 WAM industry research on WA musician incomes, 2023–24. Support Act Wellbeing Survey 2024.

CHAPTER 3

3 The Anxiety Economy

How financial precarity becomes a mental health crisis.

There is a particular sweet cruelty in the way the music industry talks about itself. It speaks of passion, of calling, of the 'gift' of doing what you love — language that performs warmth and sincerity while describing an economic arrangement that would be recognised as exploitation in any other sector. The same one applied to women around their unpaid domestic labour, or people who work in charities around the expectation of unpaid volunteerism. You do it for love.

The person who loves what they do is easier to underpay than the person who is merely doing a job. The language of passion and vocation has always been cheaper than a fair wage, and the music industry has been fluent in it for a very long time. It is a blatant manipulation.

The data from Support Act's 2024 mental health survey makes the cost of that fluency legible in terms that should be difficult to set aside.

73%	57%	66%	84%
REPORT ANXIETY OR DEPRESSION	REPORT SUICIDAL IDEATION	HIGH PSYCHOLOGICAL DISTRESS (4× GEN. POP.)	FINANCIAL INSECURITY

Sources: Record Union (2019); Support Act & CSI Swinburne (2022); Entertainment Assist & Victoria University (2020). Note: this section discusses suicide and mental health distress.

These are not the figures of an industry with a mental health awareness problem. They are the figures of an industry with a fundamental ethics problem that manifests as a mental health crisis. The distinction matters because awareness campaigns and wellness resources, however well-intentioned, treat a symptom while the conditions producing it remain unchanged. You cannot mindfulness your way out of a median annual income of $14,700.

The conditions of distress

Add to the basic financial precarity the fact that the employment conditions of most working musicians do not include sick leave or carers leave, because most working musicians are not employees. They are independent contractors, engaged by venues, festivals, production companies, and streaming platforms on terms that transfer all risk onto the individual. A musician who cannot perform due to illness loses the income from that performance with no recourse. A musician who develops a repetitive strain injury has no workers' compensation claim. A musician who reaches retirement age having spent forty years making music that enriched Australian cultural life has, in most cases, a superannuation balance that reflects the industry's assessment of what that contribution is worth. That is to say, very little.

Superannuation is payable on employment income. It is not automatically payable on the performance fees, recording fees, and royalty income that constitute a musician's earnings. Where it is technically payable, the compliance and collection burden falls on an individual contractor negotiating with dozens of separate engaging parties, each with structural incentives to classify the arrangement in whatever way minimises their obligations. An independent musician forced to become a business manager and payroll officer.

The consequence is a generation of working musicians approaching retirement with inadequate savings, having spent their careers contributing to an industry that will not be contributing to their financial security.

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> *Support Act exists because the industry has not addressed the conditions that make its services necessary. An emergency charity supporting working musicians in financial and mental health crisis is not evidence that the sector cares for its workforce. It is evidence of how far the industry and policy failure extends.*

Marginalised musicians carry a double burden

For First Nations artists, women, gender-diverse people, and those from culturally and linguistically diverse backgrounds, these pressures are intensified. They must navigate not only economic instability but also structural barriers to representation, cultural stereotyping, and discrimination within the music industry. The effort required to access equal opportunities often involves additional emotional labour, code-switching, and resilience in the face of bias — all of which exact a mental health toll that sits on top of the economic precarity experienced by all independent musicians.

Algorithm-driven platforms compound this inequity in ways that are now well-documented. Research has found that women and gender-diverse musicians are consistently underrepresented in curated playlists and algorithmic suggestions. An analysis of Spotify's RapCaviar playlist found that only 10.8% of featured artists were women over a 19-month period. First Nations artists report difficulty gaining algorithmic traction unless they conform to genre expectations that fit global platform stereotypes. LGBTQIA+ content has been erroneously classified as sensitive by recommendation systems on major platforms, suppressing visibility for artists whose identities intersect with marginalised communities. We're queer, but we're not here.

The policy response that does not exist

The policy responses that would address the structural conditions are known and, in most cases, available. Portable entitlements schemes that allow independent contractors to accrue superannuation and leave entitlements across multiple engagements exist in other sectors and could be extended to cover musical performance. Venue licensing conditions that require minimum performance fees inclusive of superannuation would shift bargaining power without requiring individual musicians to negotiate against structurally more powerful counterparties. Streaming royalty reform would address the income floor problem at scale.

Several of these interventions have been recommended in government inquiries in Australia and internationally, implemented in comparable jurisdictions, and not implemented here. The obstacle is not that the solutions are unknown. It is that the beneficiaries of the current arrangement have more political leverage than the people harmed by it, and that the harm is diffuse, individual, and wrapped in the language of passion in ways that make it easy to misread as choice.

PROVOCATION TO GOVERNMENT

What if artist wellbeing was treated as a key performance indicator of public investment in music — measured, resourced, and valued as a central outcome of a healthy cultural ecosystem, rather than managed as a downstream consequence of structural arrangements nobody is officially responsible for?

CALL TO ACTION

Redesign arts funding criteria to reward long-term career sustainability and embed mental health indicators in funding evaluation frameworks. Trial a Universal Basic Income program for independent musicians in partnership with Music Australia, reporting outcomes publicly within two years.

7 Record Union, Mental Health in the Music Industry: Independent Musician Survey (2019). Support Act & Centre for Social Impact Swinburne, Mental Health and Wellbeing in Music and Live Performing Arts (2022). Entertainment Assist & Victoria University, Mental Health and Wellbeing in the Australian Entertainment Industry (2020). If you or someone you know needs support, Support Act offers a free Wellbeing Helpline: 1800 959 500.

8 Smith, Choueiti, Pieper & Clark, 'Gender Representation in Spotify RapCaviar,' USC Annenberg Inclusion Initiative (2021). The Verge, 'YouTube's Restricted Mode is Hiding LGBTQ+ Videos' (2017).

CHAPTER 4

4 Death by a Thousand Closures

The live music infrastructure emergency in Western Australia.

Between 2010 and 2024, Greater Perth lost at least 28% of its dedicated live music rooms under 500 capacity. More than one in four stages where emerging artists develop their craft, build audiences, and learn what it means to perform for a room — gone. Not through any single dramatic decision, but through the accumulated weight of planning approvals, liquor licensing processes, noise complaints, acoustic retrofitting costs, and a regulatory environment that treats live music venues as a problem to be managed rather than cultural infrastructure to be protected.

81	33,000	$120K+	28%
DEDICATED LIVE MUSIC VENUES IN ALL WA	RESIDENTS PER VENUE (WA)	ACOUSTIC RETROFIT COST FOR 200-SEAT ROOM	OF PERTH VENUES LOST 2010–2024

By comparison, Melbourne has approximately 8,785 residents per venue. Sources: WAM Industry Reports; Live Music Office census (2024).

How venues close without anyone deciding to close them

The mechanism by which venues close in WA does not look like a policy decision. It looks like a series of individual unfortunate circumstances, each explicable on its own terms, adding up to a pattern that nobody is officially responsible for.

A developer receives planning approval to build apartments adjacent to a venue that has operated for years or decades. New residents find the venue louder than anticipated. Noise complaints are lodged. The venue is required to demonstrate compliance with noise standards, which in practice means acoustic retrofitting.

The cost of bringing a 200-seat room up to WA noise standards routinely exceeds $120,000, more than most small venues generate in annual profit. Unable to fund the retrofit and unable to operate without compliance, the venue closes.

At no point in this sequence does any single decision look like the closure of a music venue. The planning approval was for housing. The noise complaints were from residents with legitimate interests. The noise standards exist for good reasons. The venue's inability to fund the retrofit is a private business failure. The closure is, officially, nobody's fault.

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Victoria implemented enforceable agent-of-change planning provisions in 2014. London followed in 2018. Both jurisdictions report significant reductions in venue closures attributable to development pressure. WA implemented a non-statutory guideline in 2022 — a document that describes what good practice would look like without creating any obligation to practise it. Five local governments have adopted it.

The economics of venue support

NSW's venue acoustic retrofitting grant program found that every public dollar invested in venue acoustic support generated $16.70 in local economic activity, based on NSW Government modelling. The return is better than most infrastructure investments the government makes, and substantially better than the tax concessions and planning incentives that flow to property developers whose activity is, as described above, a primary driver of venue closures.

WA budget priorities — what the numbers say

WA Government allocation (2025–26)	Annual amount	Notes
Sport & community infrastructure	$332M	Single budget year
Fossil fuel subsidies	$315M	Annual estimate
Event tourism (Tourism WA)	$91.6M	Average annual
Collie coal transition	$118M	Total program
Coldplay subsidy (Live Nation)	**$8.0M**	*Two concerts, Nov 2023*
Contemporary Music Fund + Live Music Pkg.	**~$1.0M**	*Annual, supports entire indie. sector*

Table 4.1. WA Government budget priorities, comparator. The state spent eight times more bringing Coldplay to Perth for two concerts than it allocates annually to support every independent musician in WA. Sources: WA State Budget papers 2024–25 and 2025–26; Coldplay subsidy figure obtained by The Guardian (July 2024).

$15 million over three years for acoustic retrofit funding — less than twice what the state paid to bring Coldplay to Perth for two concerts — would, on NSW Government modelling, generate approximately $250 million in local economic activity and protect the majority of venues currently at risk. It's not a lot to ask.

The regional dimension

45% of Western Australia's population lives in regional areas. 14% of ticketed live music events occur there. WA has 14 regional music venues for 1.26 million regional residents. The arithmetic describes a cultural geography in which regional communities are systematically underserved by the live music infrastructure that urban Australians treat as a normal feature of community life.

An artist travelling from Perth to a regional centre may face a six-hour drive each way to play for an audience that cannot generate enough ticket and merchandise revenue to cover travel costs and a reasonable performance fee. Many artists do not make the trip. Regional promoters stop programming touring shows. Audiences stop expecting live music. The ecosystem atrophies not through any single failure but through the rational individual decisions of artists and promoters responding to economics that do not work.

The Pack's platform model is specifically designed to address this geography. Geo-fenced discovery makes regional artists visible to regional listeners without requiring either party to navigate the economics of physical distance. Business streaming subscriptions in regional precincts generate direct per-play payments to regional artists. Local government patron memberships fund the platform development and marketing that sustains the regional ecosystem.

These are not substitutes for venue infrastructure — the case for venue support remains — but they are digital infrastructure that can operate in places where the live infrastructure is absent or inadequate, and provide supplementary incomes where other options don't exist.

PROVOCATION TO GOVERNMENT

What if the places where artists and communities meet were classified as essential infrastructure — accorded the same planning protections, funding priority, and policy urgency as the roads and sporting fields government builds without debate?

CALL TO ACTION

Introduce enforceable agent-of-change provisions in all WA planning schemes immediately. Establish a $15 million venue acoustic retrofit fund over three years. Streamline liquor licensing for venues under 150 capacity. Fund a regional touring circuit development program.

9 Venue closure statistics from WAM Industry Report and Live Music Office national venue census data. The 28% figure for Perth venue closures 2010–2024 is drawn from WAM advocacy submissions and Live Music Office census research. Melbourne comparison from Live Performance Australia annual industry survey.

10 NSW venue acoustic retrofit economic impact data ($16.70 per dollar) is drawn from NSW Government modelling of its live music venue support program. WA guideline adoption from WAM advocacy submissions 2023–24.

11 Regional WA venue and event data from Live Performance Australia regional survey and WAM Regional Music Development Program reporting. Population from ABS 2021 Census.

CHAPTER 5

5 Rich State, Poor Sector

The WA funding gap and what it reveals about political priorities.

Western Australia generates more royalty income per capita than any other state. Its mining sector produced over $177 billion in export revenue in 2023–24. It runs consistent budget surpluses that most jurisdictions regard with some envy. It is, by most measures, the wealthiest state in the country.

It is also the state that has allocated the least to its independent music sector of any comparable jurisdiction.

Since 2018, WA's Contemporary Music Fund has been the primary mechanism for supporting the state's independent musicians. The fund began with a $3 million, four-year commitment — roughly $750,000 a year. It has been renewed twice, and from July 2025 a further $2.75 million was added across four years.

The total annual investment now sits somewhere above $1 million, depending on which components you count. What it does not include is indexation. Which means that in real terms, after nearly a decade of cost increases that have made everything about running a music career more expensive, the fund now buys less support for WA musicians than it did when it began.

State-by-state comparison

Jurisdiction	Annual investment	Vehicle	Per capita
Victoria	$35.4M+	Live music programs	~$5.20
NSW	$6.2M*	Sound NSW	~$0.74
Western Australia	**~$1.0M**	*CMF + Live Music Pkg.*	**~$0.36**
Federal (Music Australia)	$17.0M	Music Australia + Revive Live	~$0.65

*Table 5.1. Per-capita investment in contemporary music by jurisdiction. *Sound NSW $18.5M annualised across 3 years. Sources: Live Music Office; Australia Council comparative funding analysis (2023); state budget papers.*

Victoria, in a single budget year, committed $35.4 million to live music. New South Wales allocated $18.5 million to Sound NSW — a contemporary music agency that didn't exist three years ago. Western Australia does not have an equivalent agency. It has a grants program, administered within a department that also covers tourism and sport, with a budget that would not fund a small infrastructure project in either of those other portfolios.

The argument is not that WA needs to match Victoria dollar for dollar. Population differences are real, and Melbourne's scale as a live music city reflects decades of compounding investment. The argument is simpler: the gap between what WA extracts from its music sector — in cultural identity, in tourism, in the GDP contributions documented by the Music Australia Bass Line report — and what it invests back into the people who produce that value is not a funding constraint. It is a policy choice and an indicator of value.

> *WA's fossil fuel subsidies total approximately $315 million annually — 105 times the Contemporary Music Fund. Event tourism receives $91.6 million — 30 times more. The Collie coal transition support program received $118 million — equivalent to nearly forty years of the Contemporary Music Fund.*

As noted previously, budget allocations are not neutral accounting exercises (see Table 4.1 for the comparator). They are expressions of priority, made legible through numbers. The question of what receives public investment is a political question with a political answer, and the answer is visible in the figures.

The event tourism comparison

Since 2020, Tourism WA has spent over $15 million attracting headline international acts through direct event subsidies. The most documented example is $8 million paid to Live Nation (despite its exploitative and anti-competitive behaviours) for two exclusive Coldplay concerts in November 2023 — a figure the government declined to publicly disclose until documents were obtained by The Guardian. The government's own declared rationale was that Coldplay injected "tens of millions of visitor spend" into the state's economy.

The economic impact argument for major event investment is not without merit — up to a point. International acts draw visitors, fill hotels, and generate hospitality spend. But the headline figures conceal how much of that spend leaves the state almost immediately. The hotels filling up for a Coldplay weekend are frequently owned by global chains whose profits flow offshore. The main touring production — crew, equipment, logistics — arrives with the act and departs with it. The royalties generated by the performance flow to the rights holders, who are not based here. And the fee itself, in this case $8 million, went directly to Live Nation: a US-listed multinational whose profit from the transaction does not circulate in the WA economy.

The "visitor spend" framing is not false, but it is incomplete. It's a government patting itself on the back while it counts (and loudly publicises) the money that comes in without asking how much stays, who captures it, and for how long. Every dollar invested in grassroots live music returns approximately $3.60 to local economies.

A more honest accounting approach would compare the genuine local economic residue of a one-night international event against the sustained, year-round contribution of the artists who live here, pay tax here, employ local sound engineers and venue staff every week, and build the audience culture that makes WA a viable market for touring acts in the first place. The headline receives $8 million for two shows. The ecosystem that makes the headline possible receives roughly $1 million a year, which has never been indexed for inflation.

The talent drain

Western Australia has produced musicians who compete at the highest levels nationally and internationally. This is not in question. What is in question is where those careers tend to mature, and why.

Melbourne and Sydney offer more venues, more funding bodies, more industry infrastructure, and the accumulated critical mass that makes the next stage of a career possible — the support tour, the label conversation, the booking agent with eastern-state connections, the other musicians working at the same level. These are the conditions under which a mid-career artist becomes a sustainable one.

WA musicians who reach the point of needing those conditions face a familiar set of options: relocate, tour at a loss often enough to build the profile, or scale their ambitions back to fit what the local infrastructure can support. Many choose the first. The development cost — the years of gigs, the community support, the early-career investment of family and local venues and grant-funded opportunities — is borne by Western Australia. The career, if it materialises, is captured somewhere else.

This is not a criticism of individual decisions. It is a description of an incentive that no amount of talent or local loyalty reliably overcomes. Funding alone does not create great musicians. But the absence of it does determine where great musicians can afford to stay and create their careers.

International comparisons

Jurisdiction	Annual investment	Outcome	Notes
Austin, TX	$25M	**7:1 economic return**	Citywide music programs
Iceland	Sustained	**Major export ecosystem**	National Music Fund + Reykjavík support
South Korea	$500M / 10 yrs	**$10B annual return**	K-pop export infrastructure
Berlin	€10M	**Most at-risk venues retained**	Venue support program

Table 5.2. International music sector investment outcomes. Sources: City of Austin Music Division; Iceland Music; KOCCA; Berlin Senate.

These are not cases from jurisdictions with vastly larger budgets than wealthy WA. They are cases from places that decided the music sector was an investment in economic diversity rather than a subsidy, applied resources accordingly, and produced outcomes that are now cited internationally as models. The common thread is not only the scale of the investment but also the political decision to treat cultural infrastructure as vital rather than discretionary.

Matching Victoria's per capita investment in its contemporary music sector would require WA to triple its annual CMF allocation. In a state budget of over $40 billion, with a significant surplus, this is not an unreasonable ask. A simple redirection of focus — from international to local — could more than service it.

PROVOCATION TO GOVERNMENT

Western Australia spent $8 million subsidising two Coldplay concerts for a band that performed once, then left. What if it spent the same amount on the musicians who live here, pay taxes here, employ local crews year-round, and build the audience culture that makes the state worth visiting in the first place?

CALL TO ACTION

Significantly increase the annual allocation to the Contemporary Music Fund to bring WA's per capita investment in contemporary music into line with comparable eastern-state jurisdictions. Commission a ten-year WA Music Industry Strategy with dedicated funding for venue support, career development, regional touring, and music export infrastructure.

12 Per capita music investment figures by state from the Live Music Office national survey and Australia Council comparative funding analysis 2023. WA Contemporary Music Fund from State Budget 2024–25.

13 Coldplay subsidy: $8 million paid to Live Nation for two exclusive November 2023 concerts at Optus Stadium, per documents obtained by The Guardian (July 2024). The WA Government declined to publicly disclose the amount. Other Tourism WA event subsidy figures from WA State Budget supplementary papers where publicly disclosed.

14 Austin music economy from City of Austin Music and Entertainment Division annual report. Iceland Music (Icelandic Music Information Centre) and City of Reykjavík Music City project documentation. South Korea from Korea Creative Content Agency (KOCCA). Berlin from Berlin Senate Department for Culture and Europe.

CHAPTER 6

6 The Failure of Incrementalism

What policy has tried, what it has not tried, and why it is not enough.

The international policy response to streaming inequity has moved, but slowly, and largely at the margins of a model whose fundamentals remain unchanged. Understanding what has been tried, and why it has not been sufficient, is essential context for understanding why any realistic approach to streaming equity must involve building a different model rather than reforming the existing one.

Policy interventions, at a glance

Jurisdiction	Intervention	Status
UK (2021)	DCMS Music Streaming Inquiry	Recommendations made; CMA declined to mandate intervention
Canada (2023)	Online Streaming Act (Bill C-11)	Passed; per-stream rates unchanged; implementation evolving
EU (2022)	Digital Services Act (Regulation 2022/2065)	In force; algorithm transparency obligations apply to large platforms
Australia (2023)	Revive cultural strategy	**Music quotas "delayed indefinitely" (Parliament, 2025)**
Australia (Nov 2025)	Communications Legislation Amendment (SVOD content)	*Passed for streaming video; equivalent for music: not yet*

Table 6.1. International streaming policy responses. Sources: UK DCMS Committee (2021); Government of Canada (2023); EU Commission (2022); Parliament of Australia FlagPost (2025); Communications Legislation Amendment Bill 2025.

The UK inquiry

The UK Parliament's 2021 inquiry into the economics of music streaming concluded that the current streaming model 'fails to reward success appropriately' for all but the top tier of artists. Recommendations included equitable remuneration for performers, transparency in royalty accounting, and stronger negotiating rights for artists.

The inquiry sparked widespread public discourse. The Competition and Markets Authority ultimately declined to mandate specific interventions. The model continues to operate as designed.

Canada's Online Streaming Act

Canada's 2023 Online Streaming Act (Bill C-11) expanded broadcasting regulations to cover online platforms, empowering regulators to impose conditions compelling services to promote Canadian content and improve the discoverability of Canadian and Indigenous works. The principle is clear. The implementation details are still evolving. The per-stream royalty rates remain unchanged.

Australia's tentative steps

Australia's 2023 cultural strategy Revive announced that streaming services 'will get Australian content quotas' and that artists would receive greater 'fair remuneration.' The details of when and by what regulatory mechanism were frustratingly vague. Parliamentary updates in 2025 confirm that the quota requirement has been 'delayed indefinitely.' Streaming platforms in Australia face no enforceable obligation to promote or fund Australian music on their services.

The November 2025 passage of the Communications Legislation Amendment (Australian Content Requirement for Subscription Video On Demand Services) Bill establishes a precedent for federal intervention in streaming markets — for video. Music is conspicuously absent. APRA AMCOS has explicitly called for equivalent measures.

The creation of Music Australia within Creative Australia is a welcome development. Music Australia has produced vital research, including the Bass Line economic analysis and the Listening In series on music engagement. If resourced appropriately, it could help pilot new streaming payment models and advocate for data transparency in royalty distribution. The current allocation is inadequate for the scale of the reform required.

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> *Australia has been moving at glacial speed on a problem that has been moving at warp-digital speed since 2010. The policy response has, in most cases, arrived too late to address the conditions it was designed to ameliorate.*

Why reform within the existing model is insufficient

Each of the policy interventions described above operates within the existing commercial streaming model. They seek to require that model to behave more fairly without changing who owns it, who governs it, or whose interests it is fundamentally designed to serve.

This approach has a logic: the existing platforms have the scale, the infrastructure, and the audience relationships that any new entrant would take years to develop. Working with the existing model sounds easier than building an alternative.

The problem is that the existing model's unfairness is not a hole that can be patched by regulatory requirement. Globalised streaming currently applies a business model in which the incentives are fundamentally misaligned with the interests of artists.

A platform whose business model depends on maximising engagement and subscriber retention will, all else being equal, continue to optimise its recommendation systems for content that produces those outcomes. It's not going to change because governments ask it to. The billionaire class doesn't care about government except where it can be manipulated for its own gain. That has been starkly demonstrated in recent years.

Quota requirements, transparency mandates and advocacy projects can shift behaviour at the margins. They cannot change the underlying incentive structure. The alternative — changing who owns the infrastructure and therefore whose interests it serves — requires building something completely different. That is what The Pack is doing.

PROVOCATION TO GOVERNMENT

Australia has been announcing music policy reforms since 2021. The quotas are delayed. The remuneration frameworks are under consideration. The taskforces are reporting. What if government decided that the cost of acting now is lower than the cost of presiding over another decade of artist poverty while the machinery of consultation turns?

CALL TO ACTION

Pass enforceable local content quota legislation by the end of 2026, with transparent quarterly compliance reporting and financial penalties for non-compliance. Establish a standing Music Streaming Reform Taskforce with government, industry, and artist representation, publishing an annual accountability report.

15 Parliament of the UK DCMS Committee, Economics of Music Streaming: Second Report of Session 2021–22. Government of Canada, Online Streaming Act (Bill C-11) 2023.

16 Parliament of Australia FlagPost: Status update — Arts policy, 2025. Creative Australia, The Bass Line and Listening In research series, 2025. Communications Legislation Amendment (Australian Content Requirement for Subscription Video On Demand Services) Bill 2025.

CHAPTER 7

7 The Cooperative Alternative

A different ownership model, different incentives, different outcomes.

The Pack Music Co-operative was founded on a simple question: *what would it look like if the infrastructure for distributing music were owned by the people who make it?* Not managed on their behalf by a company whose interests might or might not align with theirs. Owned by them, governed by them, with the revenue distribution and the platform decisions answerable to them through formal democratic process.

The cooperative model is not a new answer to this question. It is a very old one. The Rochdale Pioneers established the first modern consumer cooperative in 1844, in response to exploitative pricing by mill owners — a context that maps onto the streaming conversation with uncomfortable precision. And in fact, community economics goes back many millennia before we applied the moniker ‘cooperativism’ to the model. Cooperative enterprises have operated at scale in banking, agriculture, retail, housing, and manufacturing for centuries.

CO-OPERATIVE SCALE, GLOBALLY

$2.5 trillion

Combined turnover of the global cooperative sector — roughly 2% of the entire global economy, larger than the GDP of France, the UK, or India individually, supporting the livelihoods of approximately one billion people, or one in eight humans alive today.

These are not the figures of a fringe movement. They are the figures of a proven form of economic organisation that operates at scale across banking, agriculture, retail, housing, insurance, and manufacturing in virtually every country on earth.

The treatment of cooperative models in start-up culture as charming but impractical alternatives to real business requires ignoring most of the available evidence. Cooperatives are not uniformly small, niche, or fragile. Mondragon, the Basque worker cooperative federation, employs over 70,000 people and generates annual revenues exceeding €11 billion.

The reason cooperatives are not dominant in the technology sector is not that cooperative principles are incompatible with digital platforms. It is that venture capital, which funds the majority of technology platform development, requires a return structure that is incompatible with cooperative ownership, and so the funding infrastructure for technology has actively selected against cooperative models regardless of their social and economic merits.

Platform cooperativism

Platform cooperativism — applying cooperative governance principles to digital platforms — is a relatively recent theoretical and practical development, but the underlying logic is straightforward. The internet's capacity to organise distributed communities creates the conditions for cooperative ownership at scales previously impossible. Digital democracy does not solve every governance problem, but it removes the spatial constraints that perhaps limited earlier cooperative models.

What remains constant across cooperative forms, digital or otherwise, is the governance commitment: one member, one vote, with the enterprise's priorities determined by its members rather than by external shareholders whose interests may diverge significantly from those the enterprise is supposed to serve.

The Pack is building a cooperative music streaming service: a community-owned platform, democratically governed by artists, listeners, and workers. The code and policies are open to members. Curation is community-driven. The model demonstrates that an alternative is theoretically viable.

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> *The cooperative model does not merely redistribute a larger share of existing revenue to creators. It changes who decides how revenue is distributed, what content policies apply, how the recommendation infrastructure works, and whose interests are represented when those decisions are made.*

What The Pack's cooperative model means in practice

The Pack is constituted under the seven cooperative principles: voluntary and open membership; democratic member control (one member, one vote); member economic participation; autonomy and independence; education, training, and information; cooperation among cooperatives; concern for community.

These principles are guarantees. They are the founding governance approaches that determine how decisions are made and by whom. The revenue distribution model — 70% to artists, 15% to sector development, 15% to platform operations — is a constitutional commitment that requires member vote to alter, not a policy that can be changed at management's discretion (or when the CEO wants to cash out some shares to invest in AI war tech). The same applies to the democratic governance structure, the prohibition on 100% AI-generated music, the ethical investment framework, and the data sovereignty commitments.

These commitments exist because The Pack is aware, as an organisation, that the distance between a cooperative with good intentions and a platform that reproduces the inequalities it was designed to address is shorter than it looks from the founding moment. The governance architecture is the mechanism by which good intentions are converted into durable contracts.

What the cooperative model does not solve

The cooperative structure does not automatically produce ethical outcomes. It produces a governance framework in which the people most affected by the enterprise's decisions have formal power over those decisions. Whether they exercise that power well depends on the quality of the governance design, the commitment of the membership, and the ongoing work of maintaining democratic participation against the tendency of all organisations to drift toward the convenience of whoever is most actively engaged in day-to-day operations.

Cooperatives *can* reproduce existing inequalities. They *can* be captured by a motivated minority. They *can* make bad decisions through democratic process. The structure is necessary but not sufficient. This acknowledgement is not pointing to any specific weakness in the cooperative model, it is simply an honest account of what governance structures can and cannot do in any business model — they cannot force people to be ethical or equitable.

However, it does acknowledge that the major streaming platforms, whose governance structures serve the interests of shareholders rather than artists, are not in a position to offer any kind of commitment to ethics or equality, so applying cooperative principles is a step in a different, and hopefully better direction.

PROVOCATION TO GOVERNMENT

What if governments showed the courage to underwrite new economic experiments — investing in cooperative streaming platforms, user-centric payment pilots, and local-content discovery systems — instead of waiting for incumbent platforms to voluntarily reform arrangements that are working exactly as designed?

CALL TO ACTION

Provide seed grants, legal support, and tax incentives for artist-owned streaming services and distribution platforms. Allow not-for-profit and cooperative licensing arrangements under the Broadcasting Services Act. Partner public and community radio networks with cooperative music platforms to accelerate scale.

17 Trebor Scholz, Platform Cooperativism: Challenging the Corporate Sharing Economy (Rosa Luxemburg Stiftung, 2016). Trebor Scholz and Nathan Schneider, eds., Ours to Hack and to Own (OR Books, 2017).

18 International Co-operative Alliance World Cooperative Monitor. Mondragon Corporation annual report. Resonate Cooperative, About Resonate — Play fair, resonate.coop.

CHAPTER 8

8 The Pack: A Scalable Solution

How the platform works and what makes it different.

The Pack Music Co-operative Ltd is Australia's first musician-owned streaming platform, registered as a cooperative in Western Australia. The platform is being built around a geo-fenced music streaming service that connects local artists, local businesses, and local listeners underpinned by a user-centric payment model — ensuring that the money generated by local listening stays in the local music economy rather than flowing offshore to global shareholders.

The user-centric payment model

Under the pro-rata system used by Spotify, Apple Music, and all major streaming platforms, subscription revenue is pooled globally and distributed to rights holders based on their share of total platform streams. A subscriber who listens exclusively to local independent music is effectively subsidising the royalties of whichever international artists dominate global play counts. The money does not follow the listener. It follows the algorithm.

The Pack's user-centric model routes 70% of each subscriber's monthly fee directly to the artists that subscriber actually listens to, NOT into a global pool. If you spend your month listening to WA artists, 70% of your subscription funds WA artists. The remaining 30% is split equally between platform operations (15%) and a sector development fund (15%) that finances grants, touring support, recording programs, venue infrastructure, and regional music development.

	Pro-rata (Spotify et al.)	User-centric (The Pack)
Revenue pooling	All subscriber fees pooled globally	Each subscriber's fee allocated only to their listening
Beneficiary skew	Dominant international catalogues	Artists the listener actively chose
Threshold for payment	1,000+ streams in 12 months (Spotify, 2024+)	No minimum stream threshold
Catalogue scope	Major-label & global content dominant	Australian unsigned & independent only
Royalty share to artists	~52–70% (varies by platform)	70%, contractually fixed

Table 8.1. Pro-rata vs user-centric payment models.

Research from France's Centre National de la Musique, which modelled the impact of user-centric payments on the streaming market, found that the model would shift a meaningful share of revenue from label-signed superstars to mid-tier and niche artists — exactly the artists who have dedicated fanbases but limited algorithmic visibility. The CNM's 2021 modelling found user-centric systems increase individual artist earnings by 10–50% compared to pro-rata benchmarks. This would still, however, be insignificant for the vast majority of the musicians on these platforms, whose current streaming revenues are negligible. 10% more than nothing is still only a marginal improvement on nothing.

That modelling, however, was conducted on globalised platforms where major-label artists dominate the catalogue and compete for the same pool. The Pack removes that variable entirely. There are no major-label signed artists on the platform — no Ed Sheeran, no Universal, no Sony siphoning the pool toward content that already has a global marketing machine behind it. Every stream on The Pack goes into a pool contested only by unsigned and independent musicians. The user-centric model then ensures that pool is distributed to the artists each listener actually chooses, rather than to whoever dominates aggregate play counts.

There are no shareholders redirecting a share of that revenue offshore. No global entity extracting a margin. No competition with bot farms or bad actors uploading entirely AI generated, or deep-faked content. The platform is specifically designed around smaller, localised markets where the artists and their audiences already have community connections — which is precisely the context in which user-centric payments can produce their most significant redistributive effect.

Consider what this means in practice for an artist with a genuine but modest local following — say, five hundred dedicated listeners in a regional city who genuinely love their work and stream it regularly. On Spotify, those five hundred listeners contribute to a global pool of hundreds of millions of streams, and that artist's share is determined not by the loyalty of their audience but by their infinitesimal fraction of total platform activity. Their five hundred devoted fans are, in economic terms, nearly invisible.

On The Pack, those same five hundred listeners direct 70% of their subscription fees to the artists they actually listen to. The artist's income becomes a direct function of the depth of their audience relationship rather than its size relative to the global market. A small, loyal, local following — precisely the kind that independent and emerging artists build first, and build most authentically — becomes economically meaningful rather than economically irrelevant.

This dynamic compounds with The Pack's geo-fenced localisation model. When listeners are discovering artists specifically from their region or community, the relationship between listening and support is not incidental.

The business subscription dimension extends this further. When a café, gym, or retail space in that same regional city subscribes to The Pack's business tier and streams local music in-venue, every play generates a direct per-stream payment to local artists — while simultaneously functioning as ambient promotion to an audience that may not yet know those artists exist.

That connection between digital discovery and live attendance is where the real multiplier effect lies. Streaming income, even under the most favourable user-centric model, will not by itself sustain a music career for most independent artists. But streaming income combined with a platform that actively converts listeners into gig attendees, social followers, and direct supporters creates a pipeline that no longer exists in the Australian independent music ecosystem. An artist on The Pack is not just uploading music and hoping the algorithm notices. They are building a documented, locatable audience whose geographic concentration makes live performance viable, whose engagement data informs where to tour and when to release, and whose platform activity constitutes a form of ongoing community investment in that artist's career.

The obvious question is what this means in absolute dollar terms, and it's not an easy question to answer. The Pack's subscriber base will obviously be a fraction of Spotify's, and the pool will be deliberately smaller. But the comparison is not between The Pack and Spotify — it is between The Pack and what independent Australian artists currently earn from Spotify, which for the majority is zero. A smaller pool distributed entirely and fairly among the people who created the reason for the platform to exist, combined with infrastructure that actively grows their live audience, their social following, and their local commercial presence, is a fundamentally different proposition from a larger pool in which those same people are invisible and commercially isolated.

For unsigned and emerging musicians who currently see negligible streaming income from platforms built around a fundamentally different commercial logic, this is not a marginal improvement. It is an entirely different arrangement — one in which the infrastructure is designed from the ground up to serve them, the incentives are structurally aligned with their interests, and the value of a dedicated local audience is finally recognised in the only language the streaming economy has previously refused to speak (with musicians, anyway): money.

Geo-fenced local discovery in practice

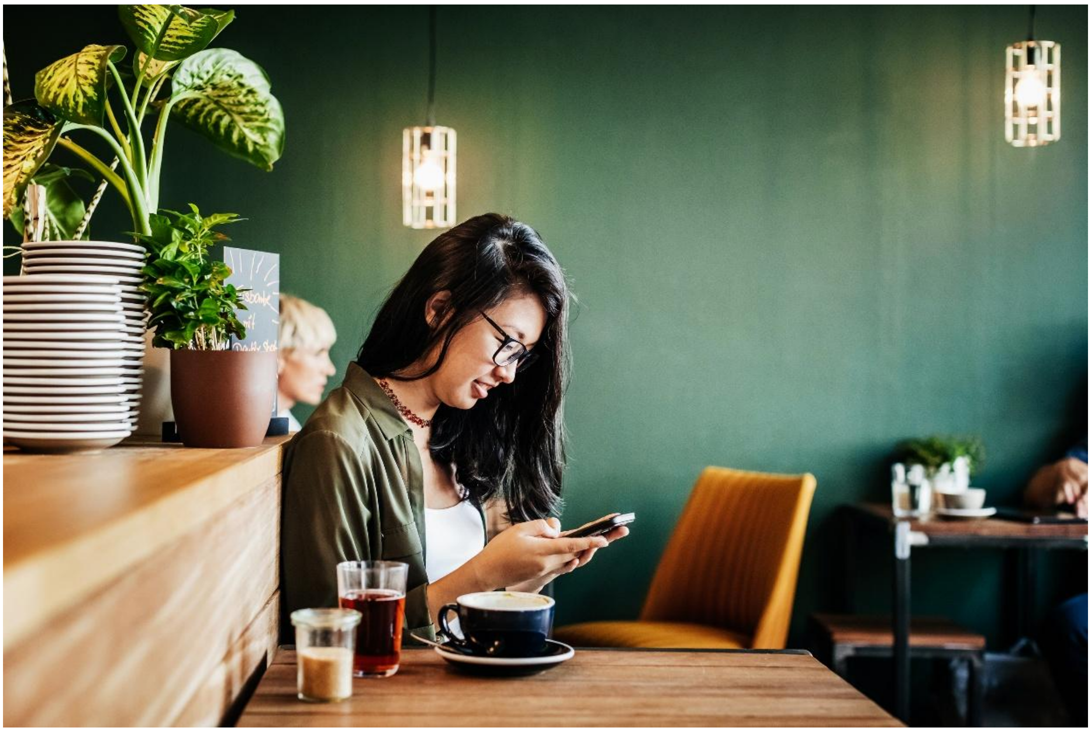
The Pack's geo-fenced discovery system works by assigning each listener a geographic zone or region and using that location as the primary filter for music recommendations, curated playlists, and discovery queues. Unlike the major platforms, which use location data primarily to serve advertising and comply with licensing restrictions, The Pack uses it to answer a fundamentally different question: not what is popular globally, but what is being made here, by people from this place, for an audience that lives here too.

In practice, this means a listener in Kalgoorlie opening the app encounters a discovery queue drawn from artists based in the Goldfields. A listener in Fremantle's inner south finds artists who gig at venues within walking distance. A First Nations listener in the Kimberley streams music from artists from their own Country, with cultural context embedded alongside the music rather than stripped out by a genre classification system designed for a global catalogue. None of this requires the listener to search, filter, or know in advance who they are looking for. The platform does the work of proximity that word of mouth used to do before communities became too large and too digitally dispersed for it to function reliably.

For artists, the geo-fencing creates something the major platforms can't and won't offer: a discovery surface that is proportionate to the scale at which independent careers actually develop. An artist building a following in Brunswick Junction or Bunbury does not need to compete with Beyoncé for algorithmic attention. They need to be findable by the people who live near them, go to the same venues, and are most likely to come to their next show. The Pack's architecture makes that findability the default rather than an accident.

The interactive layer makes the system active rather than passive. Business subscribers can allow their customers to vote on what plays next, creating a feedback loop between audience taste and playlist content that functions as real-time, low-cost market research for artists. A track that consistently gets voted up in a particular café precinct is a track that artist knows to promote when they announce a show in that area. A track that gets skipped repeatedly in a gym playlist is useful information about which recordings land in high-energy contexts and which don't. This is the kind of granular, location-specific audience data that major labels pay significant sums to approximate, and that independent artists currently have no access to at all.

The tipping function closes the loop between passive listening and active support. A customer who hears something they love while waiting for their coffee can tip the artist directly from the same interface. The artist receives notification of the tip in real time. The customer has made a direct financial connection to a local creative. That interaction — frictionless, immediate, local — is the digital equivalent of putting cash in a busker's case, with the difference that the busker is also building a documented supporter base that they own and can communicate with directly.



The business subscription opportunity in practice

Australia's OneMusic licensing scheme covers approximately 100,000 businesses that publicly play recorded music. Every one of those businesses is (or should be) paying a licensing fee to play music — including, in most cases, music that has no relationship to their location, their customers, or their community. A café in Northbridge pays to stream a frictionless Spotify playlist that might surface a track by a Perth artist once every few days, by algorithmic accident, sandwiched between global catalogue. The Pack's business subscription model proposes a direct exchange: $50 per month for a human-curated playlist of original independent music from local artists, with every play generating a direct per-stream payment to those artists.

The operational mechanics are straightforward. A business subscribes through the platform, nominates their location and the general character of their space — café, gym, retail, restaurant — and receives a continuously updated playlist drawn from artists in their geographic zone, calibrated to tempo, mood, and the time of day. The playlist updates automatically as new (space appropriate) music is uploaded by local artists with a human curator overseeing operations. The business never has to curate manually unless it wants to. The music is always original, always local, always licensed appropriately. The artists are paid for every play. The business differentiates itself from competitors playing the same three global playlists as everyone else on the street.

Uptake	Businesses	Annual fee	Direct revenue to local artists
10%	10,000	$600	**$6.0M / year**
25%	25,000	$600	**$15.0M / year**
50%	50,000	$600	**$30.0M / year**

Table 8.2. Business subscription scenarios. OneMusic covers ~100,000 businesses paying for licensed music. Even modest uptake redirects millions in existing licensing spend into local music economies.

Each business subscription does three things simultaneously: it generates streaming revenue for local artists, it exposes those artists to a new audience in a context — a physical space, a community — where discovery is ambient and social rather than solitary and algorithmic, and it creates a network of physical locations where local music is a consistent, audible presence in everyday life. This is its compounding effect. A regional town where every café, gym, and retailer is streaming local artists is a regional town where those artists are materially present in public life in a way that no amount of social media activity can replicate. That presence builds familiarity. Familiarity builds audiences. Audiences attend shows, buy recordings, and become the kind of long-term supporters that sustain independent careers across years rather than the single viral moment that the major platforms' metrics are designed to chase.

Cooperative governance and policy commitments

The Pack's governance commitments are embedded in founding documents, not expressed as aspirational values:

Commitment	What it means in practice
No 100% AI-generated music	Categorically excludes fully AI-composed or AI-performed music that replaces human artistry.
No pay-for-play	No algorithmic promotion purchased through Discovery Mode-style arrangements.
No extractive investment	Excluded sectors include fossil fuels, weapons manufacturing, predatory gambling, tobacco, and predatory finance.
Artist data sovereignty	All streaming, listener, and performance data belongs to the artist, not the platform, and is only distributed with consent to support industry development.
Right to data portability	Artists can export or erase their complete data history at any time.
Democratic governance	One member, one vote; revenue distribution model requires member vote to alter.
Human curation	No recommendation algorithm that operates without human oversight and member accountability.

Table 8.3. The Pack's governance commitments. These are constitutional, not policy — alteration requires a member vote.

These are policy commitments enforced through cooperative governance structures. The people who benefit from these commitments are the same people who have the formal power to enforce them.

The AI question

The emergence of AI-generated music at scale is the most significant new threat to the independent artist ecosystem since streaming itself. In 2025, AI-generated bands with millions of listeners were being discovered on major platforms with no disclosure to listeners.

The volume of 100% AI-generated content being uploaded to streaming services is accelerating in ways that will depress per-stream royalty rates for human musicians, crowd algorithmic recommendation surfaces, and erode the value that listeners associate with musical authenticity.

The Pack's exclusion of 100% AI-generated music is designed to demonstrate our commitment to the value of human creative labour — the value that the cooperative exists to protect and compensate. A platform that allows 100% AI-generated music alongside human music is, effectively, lowering the floor for the human musicians who depend on it for income.

PROVOCATION TO GOVERNMENT

What if every Australian listener encountered a local or independent artist every time they opened their streaming app — by design, not by accident? What if the algorithm was required to be accountable not just to engagement metrics, but to the cultural diversity and economic sustainability of the communities it operates within?

CALL TO ACTION

Require all major streaming platforms operating in Australia to disclose the core parameters of their recommendation systems and submit to annual independent audits for algorithmic bias and cultural representation. Mandate that a meaningful share of algorithmic recommendations promote independent, First Nations, and culturally diverse Australian artists.

19 Centre National de la Musique, Impact of Online Music Streaming Services Adopting User-Centric Payment Systems (2021). User-centric earnings increase estimates from multiple independent analyses summarised in UK Music streaming inquiry evidence.

20 APRA AMCOS OneMusic licensing scheme overview, 2025. Business subscription revenue projections from The Pack financial modelling, 2025.

CHAPTER 9

9 The Market Case

Demand, revenue scenarios, and the return on investment.

The economic case for The Pack is not purely speculative. It rests on documented market demand, conservative financial modelling, and a comparison with the current government investment in the sector that should be difficult for any policymaker to read without some discomfort.

Market demand

73% of Australian adults, approximately 15 million people, use music streaming services weekly. Within this market, Music Australia's 2025 Listening In research series found that 42% of music-engaged Australians would pay for a streaming platform devoted exclusively to Australian music, with the strongest demand among First Nations, regional, and younger Australians.

While 71% of music-engaged Australians feel pride when hearing Australian music and 66% want to hear more, only 31% actively seek it out — because the discovery tools that would connect them to local artists do not exist on the major platforms. The gap between that sentiment and that behaviour (or its enablement) is the space The Pack is designed to fill.

Youth adoption is particularly significant. 98% of Australians under 35 discover new music via streaming, and 66% express desire to discover more Australian music. Despite cost-of-living pressures, music-engaged young Australians demonstrate willingness to invest in music they care about, with documented preparedness to prioritise entertainment expenses that feel meaningful. The Pack's mission-driven, values-aligned proposition is specifically suited to catering to this demographic.

Revenue scenarios

With a Total Addressable Market of 5 million potential subscribers, The Pack's financial modelling across three adoption scenarios at $9.99 per month produces the outcomes shown below. Note: this TAM is intentionally conservative — 42% of 15 million weekly streaming users would imply a raw addressable market of approximately 6.3 million; the 5 million figure used here therefore understates rather than overstates the potential.

Scenario	Subscribers	Gross Revenue	Direct to Artists (70%)	Sector Dev. (15%)
Low (30% TAM)	1.5M	$179.82M	**$125.87M**	$26.97M
Medium (60% TAM)	3M	$359.64M	**$251.75M**	$53.95M
High (100% TAM)	5M	$599.40M	**$419.58M**	**$89.91M**

Table 9.1. Revenue scenarios at $9.99/month subscription pricing.

The government comparison

The scale of The Pack's potential revenue redistribution becomes striking when placed alongside current public arts funding.

Funding source	Annual investment	Notes
The Pack — Low scenario	**$152.84M**	*Artist + sector combined*
The Pack — Medium scenario	**$305.70M**	*Artist + sector combined*
The Pack — High scenario	**$509.49M**	*Artist + sector combined*
Federal: Music Australia	$17.0M	Plus $8.6M for Revive Live
NSW: Sound NSW	~$6.2M	$18.5M / 3 years annualised
WA: Contemporary Music Fund	$0.75M	Annual
WA: Live Music Package	$0.69M	$2.75M / 4 years annualised

Table 9.2. The Pack's projected redistribution vs current Australian government music funding.

Even in the most conservative scenario, The Pack would generate more annual investment in the Australian music ecosystem than all current government music programs combined — without requiring ongoing public funding. Unlike traditional grants that require repeated investment, this one-time infrastructure build creates a self-sustaining ecosystem that grows stronger with each new subscriber.

International expansion

The Pack's cooperative model taps into a global trend where audiences seek greater representation of their cultural music amid streaming platform homogenisation. International expansion opportunities exist wherever strong local music cultures meet desire for cultural preservation.

France, with its radio quotas promoting French-language songs, represents strong appetite for The Pack's model. With 73% of French music listeners using streaming platforms, a French-focused cooperative service could plausibly attract 15–20 million users. Brazil, where 40% of 110 million streaming users have expressed interest in a Brazil-only music service, represents even greater potential. Canada's cultural policy frameworks and the UK's established cooperative music movement both offer natural entry points for a cooperative streaming model with demonstrated outcomes.

The investment case

The Pack's founders have invested significantly at personal risk. A targeted external investment of $150,000 to complete platform development and launch would be, by any measure of cultural infrastructure spending, marginal — less than 1% of NSW's Sound NSW allocation, less than 1% of federal Music Australia funding, and less than 2% of what the WA Government spent subsidising two Coldplay concerts. It is the kind of sum that gets spent on a feasibility study for a feasibility study in most government departments.

PUBLIC INVESTMENT TO RECURRING ANNUAL RETURN

1,019× to 3,397×

A one-off $150,000 public investment would catalyse a self-sustaining platform generating $152M to $509M annually in direct artist and sector investment — without requiring further public expenditure.

What it could catalyse is a platform generating hundreds of millions in annual artist income, returning 70 cents of every subscription dollar directly to the musicians who earned it, and establishing Australia as the first country to demonstrate that ethical streaming economics are not just theoretically possible but operationally proven.

The economic multiplier effects from $153–509 million in annual artist and sector investment circulating through local economies — via equipment, venues, recording studios, and live music experiences — could generate GDP benefits of over three thousand times the initial investment. There are very few places a government can put $150,000 and reasonably expect that kind of return. There are even fewer where the return flows directly to the people who need it most.

A note on sector confidence — in talks with Music Australia

On excluding major-label signed artists

In conversations with Music Australia about The Pack's model, concern was expressed that a platform devoted to independent, original, and unsigned music would struggle to find a viable audience. It is not an unreasonable position for a body focused on the music industry broadly — but it is worth querying, because the implication is that a government-funded body charged with *developing* Australia's music ecosystem found the platform insufficient precisely because it is designed to serve the artists most in need of support, to the exclusion of those already adequately serviced.

This pattern is familiar in government funding spaces. Agencies tend to gravitate toward what is already successful — it (falsely) validates their investment approach. But major Australian artists signed to major labels already have platforms. Several of them, with global reach, algorithmic promotion, and marketing budgets that dwarf anything available to an independent musician in Perth, Narrogin, or Broome. The argument that The Pack's focus on unsigned and independent artists is a liability rather than a purpose is, in effect, an argument that the sector's greatest need is better infrastructure for people who already have better infrastructure.

The tension with Music Australia's own research is not subtle. The audiences most likely to adopt The Pack — younger Australians, regional listeners, First Nations communities, and music-engaged adults who feel pride in Australian music but cannot find it — are precisely those least well served by major platform curation, and by Music Australia's own evidence, the most willing to pay for something better. The demand exists. What is missing is the infrastructure to meet it, and the institutional willingness to back it.

Independent and unsigned artists are not a niche within Australian music. They are its pipeline. Every commercial success story the industry celebrates began in a rehearsal room, a regional pub gig, a self-released EP that found its first hundred listeners before it found its first thousand. The Pack is designed for that stage of a career — the stage existing platforms have no structural incentive to support, and that public investment should, by any coherent measure of cultural policy, treat as its first priority.

On unsigned versus independent-label artists

Music Australia also questioned whether The Pack could service independent-label artists on the same terms as unsigned artists. The answer is straightforward, and the architecture that makes it so already exists.

The Pack intends to pay 100% of artist earnings directly to the artist account holder. It does not intend to directly pay labels, distributors, or intermediaries, negotiate splits, hold funds in escrow, or adjudicate private agreements.

The critical difference from existing arrangements is simply who has control: in The Pack's case – this is the artist, always. An independent-label artist who uploads their music self-warrants that they have the right to do so — having negotiated this with their label as required under their contract — and self-manages whatever obligations follow. This is not novel. It is standard DSP warranty language, reframed in cooperative rather than corporate terms, and The Pack's version is more transparent about what it does and does not do than any major platform equivalent.

Independent labels are not excluded from The Pack's ecosystem — they are recognised as valuable associate members in an advisory and observer capacity. The label themselves do not, under the terms of the agreement, have voting rights, payment entitlements, or control over artist earnings via the system, but labels that support their artists' participation are welcome. Labels that wish to extract a margin from the platform directly, control its governance, or redirect its payment flows are structurally unable to do so.

This approach follows the model pioneered by Resonate, an international cooperative streaming platform that first demonstrated artist-direct, user-centric payments were technically viable and could be game-changing for artists. Unfortunately Resonate folded recently, but its difficulties were financial and organisational rather than architectural. Resonate did not fail because the model did not work. They proved it did. But what they also proved was that undercapitalisation and under-investment is the risk — which is precisely what the $150,000 seed funding being sought from government exists to address.

The terms on The Pack are identical for every artist regardless of label status (represented or unrepresented): upload your music, warrant that you have the right to do so, and receive 70% of the revenue your listeners generate directly into your account. The cooperative does not ask about label arrangements, adjudicate them, or make them its business. That is not a limitation of the model. It is precisely the point — equity, transparency and simplicity – and ownership for the creator.

Why major-label artists are not on The Pack

The exclusion of major-label signed artists is a deliberate decision, and we are comfortable being direct about it.

The three major labels — Universal, Sony, and Warner — are not neutral participants in the streaming economy. They are its primary architects and primary beneficiaries. Universal and Sony hold equity in Spotify. Warner has held equity positions in multiple streaming platforms. The major labels negotiated the pro-rata payment model that concentrates streaming income at the top of the catalogue while leaving the vast majority of artists with negligible returns. They did not design that model by accident. They designed it because it works extraordinarily well for the artists they represent and the catalogues they control.

As a result, major-label artists arrive on streaming platforms with resources unavailable to independent musicians: marketing budgets running to tens of millions per release, dedicated staff managing playlist pitching and algorithmic promotion, preferential relationships with platform editorial teams, and influence over commercial radio playlisting that flows from the same concentration of industry power. A major-label artist at the top of a Spotify editorial playlist did not get there purely because listeners chose them over other artists. They got there because an entire ecosystem of industry relationships, promotional spend, and platform incentives put them there and made sure they were visible.

Allowing major-label artists (even at a regionally specific level) onto The Pack would recreate at smaller scale the dynamic the cooperative exists to dismantle — a pool nominally available to all, in practice captured by those with the most resources and influence. The Pack is not anti-artist. It is pro-independence and pro-equity. The musicians excluded are not excluded because their music is less valuable — they are excluded because they already have platforms whose infrastructure was built around their interests. The Pack's infrastructure is built around the artists those platforms were never designed to serve.

Redressing structural imbalance does not always mean treating everyone equally. It means deliberately directing resources, visibility, and infrastructure toward those with least access to them – levelling the paying field for those who are marginalised by systemic exclusion and invisibility. In truth, that is what any serious equity-based intervention requires.

PROVOCATION TO GOVERNMENT

What if Australia became the world's first nation to solve the fundamental problem of streaming economics — demonstrating that unsigned and independent artists can build sustainable careers from their music, pioneering a cooperative model that other countries rush to replicate, and positioning itself as a global leader in fair music technology and cultural policy innovation?

CALL TO ACTION

Provide a strategic investment of $150,000 to complete The Pack's platform development and launch. This represents less than 2% of NSW's Sound NSW allocation and roughly 3% of federal Music Australia funding — yet could catalyse a self-sustaining platform generating over $150 million annually in direct artist payments within three years, without requiring ongoing public funding.

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CHAPTER 10

10 The Compounding Effect

Streaming in the context of the live music ecology, and the time-sensitivity of cultural infrastructure investment.

Economic literature on creative economy clusters has documented with some consistency the compounding nature of both investment and disinvestment in cultural infrastructure.

Live music ecosystems exhibit strong positive externalities and network effects. A venue that supports emerging artists creates the conditions for those artists to develop audiences, who become the customers for larger venues, whose revenue supports booking agents and sound engineers, whose existence makes the city a viable market for interstate and international touring acts, whose presence builds the audience culture that sustains the ecosystem across generations. Each element of this chain creates value for the others. Its loss degrades the others.

The cost of allowing the chain to degrade is not simply the cost of the lost element. It is the cost of that element plus the cascading losses to everything it sustained. When a grassroots venue closes, the emerging artists who developed there lose their stage. The local sound engineers lose a client. The booking agents have fewer venues to fill. The audience habits that formed around that venue — the expectation that going out on a Friday means live music — begin to dissolve.

Rebuilding that ecosystem, if it can be rebuilt at all, requires not just replacing the venue but reconstructing the audience culture, the artist pipeline, the technical workforce, and the booking infrastructure that the venue anchored. Research on creative economy clustering consistently finds that rebuilding degraded ecosystems costs multiples of what maintenance would have required.

The talent drain dynamic described in Chapter 5 compounds this. When a mid-career WA artist relocates to Melbourne because the infrastructure they need to grow their career does not exist in Perth, they take with them not just their future performances but the audiences they would have developed here, the collaborative networks they would have built, and the next generation of artists who would have been inspired by them. The development cost is borne by Western Australia; the career value is captured elsewhere. Each departure makes the local ecosystem slightly less capable of retaining the next promising artist — not dramatically, not in any single visible moment, but cumulatively, in the same accumulating logic that closes venues one retrofit bill at a time.

The Pack's streaming income infrastructure addresses part of this ecosystemic dynamic directly — by providing income that does not require physical presence and is not contingent on local venue density. An artist who can generate sustainable streaming income from a loyal regional audience has less incentive to relocate to access the scale that streaming income currently requires. The platform does not replace venue infrastructure — the case for venue support remains urgent and separate — but it changes the economics of staying. And changing the economics of staying, at scale, changes the rate at which the ecosystem degrades.

The argument for acting now rather than later is therefore not simply that the problems are severe today. It is that the problems are self-reinforcing, that each year of delay increases the cost of the solution, and that below a certain threshold of ecosystem health, recovery becomes not merely expensive but essentially improbable.

Australia has not crossed that threshold. But the trajectory is clear, and the direction does not reverse without deliberate intervention.

PROVOCATION TO GOVERNMENT

The live music ecosystem is not a tap that can be turned back on once the infrastructure is gone. It is a network that compounds in both directions — investment builds on investment, loss builds on loss. What will it cost, in a decade, to rebuild what is being lost right now for want of a venue retrofit fund? What will it cost to restore the artist pipeline, once a generation has concluded that a career in music in Australia is not viable? The question is not whether to invest. It is whether to invest now, while the infrastructure still exists, or later, after it does not.

CALL TO ACTION

Commission an independent assessment of the compounding cost of deferred investment in the Australian music ecosystem, modelling the trajectory of venue loss, talent drain, and audience attrition over a ten-year horizon under current policy settings versus the interventions recommended in this paper. Publish the findings as part of the next Music Australia research cycle and use them to make the economic case for urgent action to Treasury.

CHAPTER 11

11 Provocations and Calls to Action

Ten interventions for government, industry, and community.

The calls to action throughout this paper support ten specific interventions. Predominantly these are for both Western Australian and Federal government, however they also pertain to industry bodies and the broader music community. All are grounded in international precedent and available evidence, and all have been recommended before. The difference between previous rounds of recommendation and this one is the availability of The Pack as a demonstration that the alternative is possible — that the choice is not between attempting to reform the existing model and doing nothing.

#	Intervention	What government should do
01	**Pro-rata payment review**	Commission an independent review of the economic relationship between major streaming platforms and Australian rights holders, with a specific mandate to assess whether pro-rata payment models are compatible with Australia's cultural sovereignty obligations — and report by 2027.
02	**Music Sustainability Fund**	Establish a fund with matched public-private contributions to seed user-centric royalty pilots, provide income supplementation grants structured around career longevity rather than project delivery, and develop portable entitlements enabling independent musicians to accrue superannuation across multiple engagements.
03	**Wellbeing in funding criteria**	Redesign arts funding criteria to reward long-term career sustainability and embed mental health indicators in funding evaluation frameworks. Trial a Universal Basic Income program for independent musicians in partnership with Music Australia, reporting outcomes publicly within two years of launch.
04	**Venue protection package**	Introduce enforceable agent-of-change provisions in all WA planning schemes immediately. Establish a $15 million venue acoustic retrofit fund over three years. Streamline liquor licensing for venues under 150 capacity. Fund a regional touring circuit development program.

#	Intervention	What government should do
05	**WA Music Industry Strategy**	Increase the annual allocation to the Contemporary Music Fund to bring WA's per-capita investment in contemporary music into line with comparable eastern-state jurisdictions. Commission a ten-year WA Music Industry Strategy with dedicated funding for venue support, career development, regional touring, and music export infrastructure.
06	**Local content quota legislation**	Pass enforceable local content quota legislation for music streaming platforms by the end of 2026, with transparent quarterly compliance reporting and financial penalties for non-compliance. Establish a standing Music Streaming Reform Taskforce with government, industry, and artist representation, publishing an annual accountability report.
07	**Digital music innovation support**	Provide seed grants, legal support, and tax incentives for artist-owned distribution platforms, and related music industry innovations and support structures. Allow not-for-profit and cooperative licensing arrangements under the Broadcasting Services Act. Partner public and community radio networks with cooperative music platforms to accelerate scale.
08	**Algorithmic transparency**	Require all major streaming platforms operating in Australia to disclose the core parameters of their recommendation systems and submit to annual independent audits for algorithmic bias and cultural representation. Mandate that a representative share of algorithmic recommendations promote unsigned/independent, female, First Nations, culturally diverse and LGBTQIA+ Australian artists.
09	**$150,000 strategic investment in The Pack**	Provide a strategic investment of $150,000 to complete The Pack's platform development and launch. This represents less than 2% of NSW's Sound NSW allocation and roughly 3% of federal Music Australia funding — yet could catalyse a self-sustaining platform generating over $150 million annually in direct artist payments within five years, without requiring ongoing public funding.
10	**Cost of inaction modelling**	Commission an independent assessment of the compounding cost of deferred investment in the Australian music ecosystem, modelling the trajectory of venue loss, talent drain, and audience attrition over a

#	Intervention	What government should do
		ten-year horizon under current policy settings versus the interventions recommended in this paper. Publish the findings as part of the next Music Australia research cycle and use them to make the economic case for urgent action to Treasury, not merely to Arts portfolio holders who already understand it.

Table 11.1. Ten interventions for the next 18 months.

PROVOCATION TO GOVERNMENT

Imagine if, just a few years from now, Australia's music scene was flourishing on a platform that artists built and governed — with listeners discovering homegrown talent as a matter of course, creators paid fairly for every play, and a model that other nations were adopting as their own. What would it have taken to make that happen? Less than most people think. A minor seed investment. The courage to back an alternative.

CALL TO ACTION

Streaming is a tool. We decide how it is wielded. Governments, funders, and industry leaders must embrace risk, challenge entrenched business models, and champion new systems that distribute power and profit equitably. The evidence is in. The model is being built. The market is ready. The only question is whether decision-makers will act before another generation of musicians makes the calculation that Australia isn't worth staying for.

> “
>
> *Streaming technology is neither benevolent nor malevolent. It is a tool. The problem is not with the systems, the servers, or the apps — it is with the business models and corporate ethics that surround them. Those can be changed. We are changing them.*

IN BRIEF

Conclusion.

The alternative to platform capitalism is not reformed platform capitalism. It is a different ownership model, with different incentives, producing different distributions of the value that artists create. That alternative is already being built. It is The Pack.

Australia's music industry generated $8.78 billion in revenue last year. The musicians generating that value have a median annual income of $14,700 from their music. The gap between those figures is not an inevitability. It is a choice, made in governance documents and investment decisions and planning approvals and budget lines. It can be made differently.

The infrastructure for making it differently exists. The market demand is documented. The cooperative model is proven. The financial case is compelling. The cultural case is even stronger than the financial one. What remains is the collective decision to build the thing rather than continue inadequately managing the conditions that make building it necessary.

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