



Publishers' Licensing Services Annual Review 2024–25

Contents

4	Introduction from the Chair
6	Review of the Year
10	Introducing PLS Collect
12	Collective Licensing
14	Where we fit in
16	PLSclear
18	Rights Management
20	Access to Research
22	Policy
24	External Relations
28	Special Projects
30	Income and Expenditure
31	Balance Sheet
32	PLS Team
34	PLS Board of Directors
35	Our New Home

Publishers' Licensing Services (PLS) has provided rights and licensing services to the publishing industry since 1981.

A non-profit collective management organisation, owned and directed by the four main UK publishing trade associations, our primary role is to maximise the value of published content, enable its legitimate re-use, and protect copyright through effective collective licensing, permissions and rights management services.

PLS represents over 4,500 publishers and collected and distributed more than £48 million in 2024-25.

PLS is owned and directed by:



Introduction from the Chair

It is a pleasure to introduce this year's Annual Report following another successful period for PLS. For the second year running, we have delivered gross revenues in excess of £50 million – a testament to the strength of collective licensing and the continued value it brings to publishers.

My thanks go to the CLA and NLA for their tireless work in delivering this result, and to the PLS team for their professionalism and commitment throughout the year.

This has also been a year of significant industry change. The growing impact of AI on content use and rights management has brought copyright into sharp focus. I am proud that PLS has taken a constructive and forward-looking approach, working closely with partners to ensure the framework continues to protect publishers' rights while supporting innovation.

In November, we said farewell to Andrew Yeates after 13 years of valued service and wise counsel on the PLS Board. We were delighted to welcome Matt Cianfarani as his successor. Matt brings a wealth of experience from both B2B and consumer publishing, and we look forward to the perspectives he will bring.

This year also marks my final one as Chair. Reflecting on the past six years, I feel immensely privileged to have served in this role and to have worked alongside such a committed and supportive board and executive team. It is with confidence and optimism that I hand over to Monisha Shah, who brings a strong track record across publishing, public service and governance. I know PLS will continue to thrive under her leadership.

Rosie Glazebrook
Chair



“Reflecting on the past six years, I feel immensely privileged to have served in this role and to have worked alongside such a committed and supportive board and executive team”



Review of the year

A Message from the CEO

As a company well into its fifth decade and as a fully regulated collective management organisation, PLS' role and remit is well defined. While this provides clarity and purpose to our work, it also makes it important to regularly challenge our outlook and assumptions and push boundaries.

Last spring, we took time to reflect on the role of PLS within the industry and indeed within the range of not-for-profits that support and sustain our creative industries, and to ask some searching questions: what makes us different, unique, relevant? And what role should we play as publishing seeks to adapt to the seismic shifts across the industry?

As the year has progressed these questions have been brought into sharp relief as we work as an industry to tackle the unprecedented challenges presented by generative AI. Over the course of the year I've seen at close quarters the frustration, anger – and, particularly for smaller publishers, the sense of powerlessness – over the use of their content by generative AI companies without their consent.

We recognise that as a publisher-led, operationally-focused, non-profit, representing an incredibly broad range of publishing organisations, we are well-positioned to develop collective solutions to these challenges – solutions that enable legitimate access to publishers' content, generate revenues, and help to demonstrate that copyright, the bedrock upon which our creative industries are built, is neither uncertain nor a barrier to innovation and growth.

"I am delighted to report a year of record revenues, with gross revenues topping £50m for the second consecutive year and more than £48m paid out to publishers in 15,000 individual payments."

In January, working in close collaboration with our licensing partners, we announced the expansion of CLA's business and public sector licensing to include the right to use published content with generative AI tools. A few months later, again working with CLA and partners representing authors and visual artists, we announced licensing plans for the use of content in the development and deployment of generative AI models, such as training, fine-tuning, and retrieval-augmented generation (RAG).

This pioneering collective licensing scheme will provide the opportunity for those rightsholders not in a position to negotiate direct licensing agreements with AI developers to receive remuneration for the use of their works whilst ensuring that their content is protected, and copyright is respected. Allied to this we have been active and proud participants in the "Make it Fair" campaign and the Creative Rights in AI Coalition. More on this later.

PLS' role has always been broader than what we are most known for – the distribution of licensing revenues. It's why in March we launched "PLS Collect", which brings our various collective licensing activities – from consultation and market intelligence gathering, to policy and outreach, to core service delivery – under a single service. This also helps to more clearly frame our other services: PLSclear, Rights & Licensing Hub, and Access to Research, the details and latest milestones of which you will hear more about in the following pages.

The rapid pace of industry change has made outreach more important than ever and events once again featured heavily for us this year; from attendance at industry events including IPG and PPA conferences, to our regular attendance at London and Frankfurt book fairs, and finally the PLS conference which once again drew an engaging mix of publishers and other industry players.

Of course, none of the above would be possible if we didn't deliver on our core remit: the maximisation and swift distribution of revenues. I am therefore delighted to report a year of record revenues, with gross revenues topping £50m for the second consecutive year and more than £48m paid out to publishers in 15,000 individual payments. As businesses face increasing economic uncertainty, we are very aware of our responsibility to deliver a regular revenue stream.

Huge thanks as ever to CLA and NLA for their diligent work on our behalf; to our brilliant PLS team; to our board; and particularly this year to our outgoing chair Rosie Glazebrook who steps down after six years in the role. Rosie has made a significant contribution to our successes in this time, and we wish her all the best for the future.

Finally, thanks to all the publishers who have worked with us throughout the year – your insights and support are hugely appreciated as always.

Tom West
CEO

Welcome to our incoming Chair

We are delighted to announce that Publishers' Licensing Services will be welcoming Monisha Shah as the next PLS Chair, succeeding Rosie Glazebrook, whose term came to an end on 31 May.

Monisha joins at a pivotal moment for the industry and for PLS, as collective management organisations play an increasingly important role in helping to safeguard copyright and the future of the UK's creative industries amidst rapid technological change, including the rise of AI.

Her significant boardroom and commercial experience will be invaluable as we navigate these challenges.

"I care deeply about fair value for intellectual property rights. Licensing matters because it supports a flourishing creative economy. It ensures access to users and allows for sustainable innovation for creators and publishers. I am delighted to join the Board of PLS at this time of transformational change presented by new technologies to maintain the UK's 'gold standard' copyright framework."

Monisha Shah – Incoming PLS Chair



Introducing PLS Collect

The new name for our collective licensing service

This year saw the introduction of PLS Collect – the new name for our collective licensing service. The change reflects our aim to describe more clearly the breadth and purpose of the service, and the role it plays in delivering value to publishers.

PLS Collect is not just a new label. It reflects the wider contribution we make across the collective licensing landscape – from day-to-day operations to consultation, advocacy, and account support. It also gives us a clearer way to explain how this part of our work fits within the broader set of services we offer.

The rebrand comes at a time of continuing strong performance in collective licensing, and we remain focused on ensuring that revenues are distributed fairly, efficiently and with minimal administrative burden. PLS Collect is a more accurate reflection of the service we provide and the commitment behind it – to support publishers' interests and ensure collective licensing continues to work for the sector as a whole. It also provides a stronger foundation for developing future-facing licensing solutions.

Developing licensing for the AI age

As the AI revolution gathers pace, we have been working closely with CLA and our partners representing authors and visual artists to develop two licences for generative AI: one for the use of content by end users to prompt AI tools (Workplace AI), the other for the use of content by AI developers for the training, fine-tuning, and grounding of AI tools. At the same time, we have consulted closely with publishers to ensure that both solutions are firmly rooted in respect for the rights of publishers and creators.

As with our existing licensing, both will operate on a voluntary, non-exclusive basis – ensuring flexibility and control for rights holders. Workplace AI licensing launched in May 2025. Work will continue with further consultation on an AI training licensing scheme in the first half of 2025–26.

Introducing PLS Collect

A year in numbers

2024–25 in numbers

£52.3m

Gross revenue from collective licensing was up 5.7% at £52.3m.

£48m

£48m was paid out to publishers.

96%

96% of distributable revenues were paid out within 21 days of receipt.

15,000

15,000 individual publisher payments over the course of the year.



Collective licensing

Revenue and distributions

Gross revenue from collective licensing was up 5.7% overall, with increases in Business and Education sectors.

Education

Education revenue was up 6%, with multi-year agreements in place for Schools, Further Education and Higher Education sectors. Negotiations will begin in early 2025-26 on new long-term deals for Schools and Further Education.

Public Sector

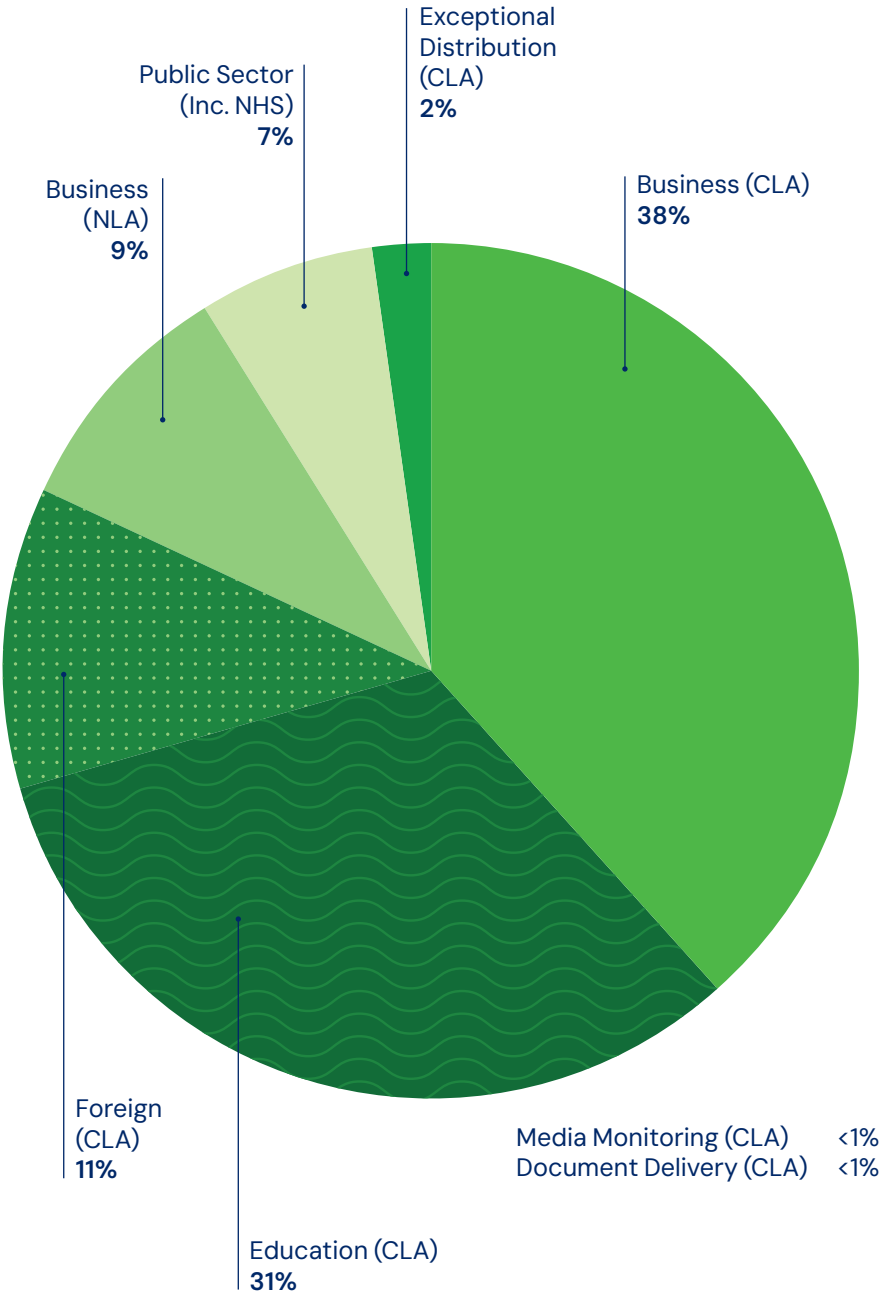
Public Sector revenue was up 8%, with long-term deals in place for Central Government and NHS England, Scotland, Wales and Northern Ireland.

Business

Business revenue was once again the main driver of revenue growth, up 8% from CLA licensing and stable from NLA.

Type of Use	Revenue £
Business (CLA)	£20,552,393
Education (CLA)	£16,893,656
Foreign (CLA)	£5,411,304
Business (NLA)	£4,540,599
Government (inc. NHS)	£3,562,978
Exceptional Distribution (CLA)	£1,014,867
- Media Monitoring (CLA)	£319,662
- Document Delivery (CLA)	£30,385

All figures in the chart are gross revenue before PLS admin fees. The NLA figure includes the shares payable to authors and visual artists. In accordance with the decision in the Rights Valuation, effective 1 January 2016, and as reflected in the Distribution Charter, PLS paid the shares due to authors (17.5%) and visual artists (10%) to ALCS and to DACS and PICSEL respectively for onward distribution prior to distributing NLA revenues to publishers.

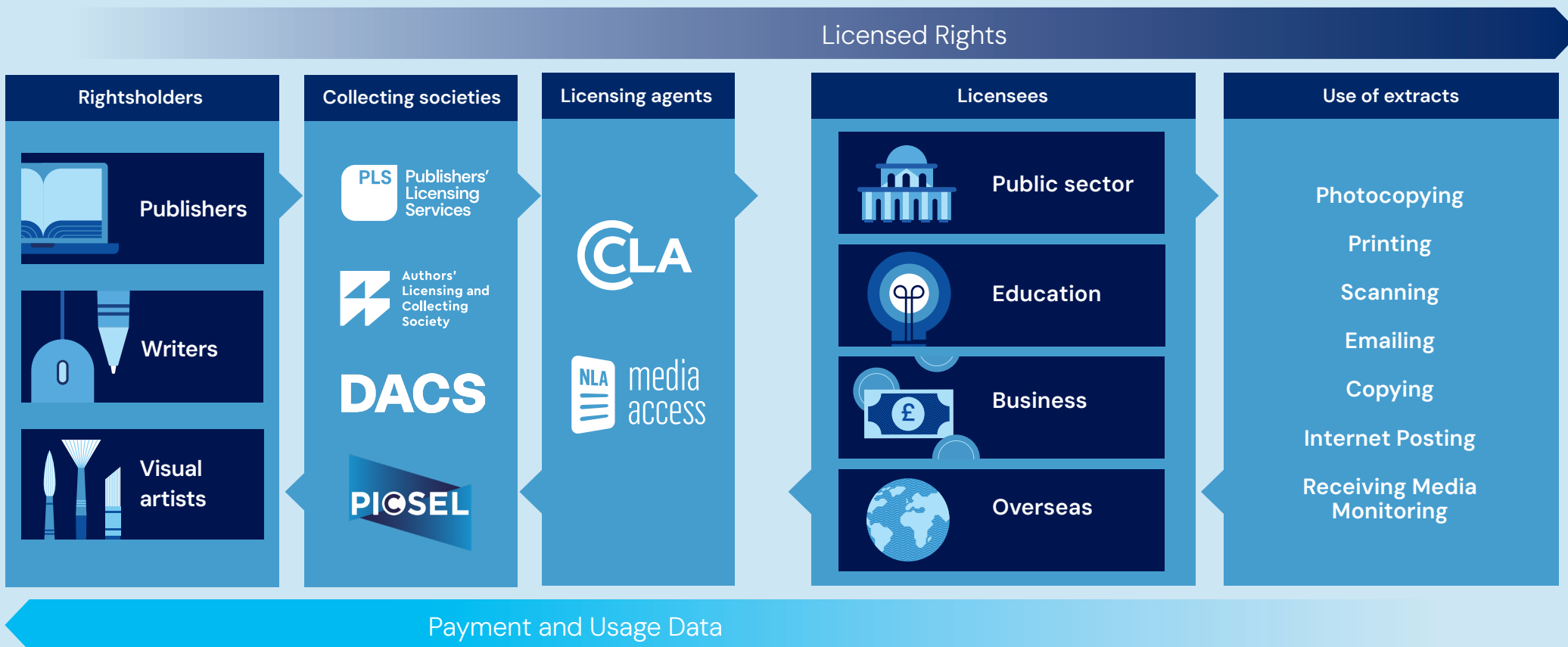


Where we fit in

PLS and the collective licensing landscape

Collective licensing plays a crucial role in enabling legal and efficient access to copyrighted content for education, business, and government, all while ensuring that creators and publishers are appropriately compensated.

From the initial granting of rights to the final distribution of revenue, PLS and other collective management organisations (CMOs) operate within the UK's collective licensing landscape to benefit rightsholders and uphold the UK copyright framework.



PLSclear

Helping publishers access a growing permissions market

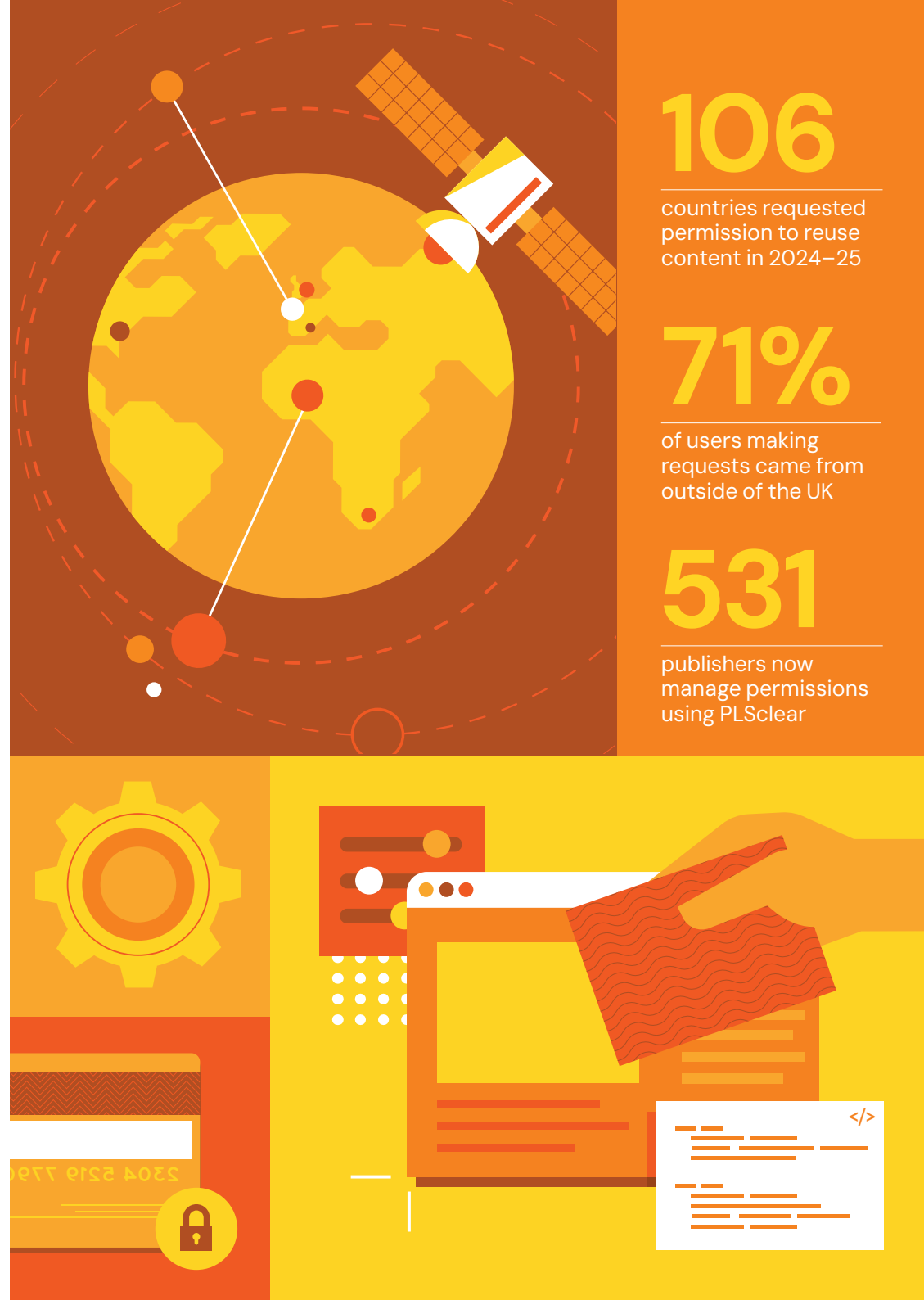
PLSclear is an award-winning permissions platform designed to save publishers time and reduce the often admin-heavy processes involved in handling permissions. By opting into PLSclear, publishers' titles become available to our growing global permissions market, while also gaining tools to manage permissions more efficiently. Signing up is easy, with no annual subscriptions or set-up fees.

Over 500 publishers of all sizes and sectors now manage their permissions using PLSclear. This growth reflects PLS' mission to support a broad range of publishers and a shared commitment to making permissions simpler, faster, and more efficient. Permissions requests came from users in 106 countries, with 71% originating from outside the UK, highlighting the platform's international reach.

Several key developments were rolled out this year. The implementation of DOIs has been particularly helpful for academic publishers and requestors, streamlining permissions for journals and book chapters. We also strengthened credit control procedures as part of ongoing service improvements to better support publishers. Our AI chatbot now assists requestors in real time, enhancing our help desk. In addition, we launched the PLSclear for Editors pack and introduced the Publisher Knowledge Hub to share best practice and updates.

Publishers using PLSclear by sector

Trade	33%	Education	13%
Academic & STM	26%	Professional	10%
Magazine	17%	Music	1%





Rights Management

Promoting the power of rights

We have continued to develop our rights management initiatives and services in 2024–25. Our mission is to raise awareness of the critical importance of good rights management, to encourage publishers to follow best practice when managing their rights and help encourage investment in rights teams and systems to improve processes.

The PLS Rights Management Group met regularly to discuss issues affecting rights teams, including copyright policy and AI. The Group is comprised of senior rights professionals across all sectors of the industry including academic, consumer/trade, and magazine publishers.

The PLS Rights Management Group also launched a mentorship scheme this year to match members of the group with early career publishing professionals, students, and publishing hopefuls seeking advice regarding specific rights-related topics in the publishing industry. The mentorship scheme was well received, with positive feedback from both mentors and mentees.

The Rights and Licensing Hub (rightsandlicensing.co.uk) was once again a popular destination for publishers seeking best practice guidance, answers to copyright queries, and access to training resources – our free online Rights Management Essentials courses providing simple and practical tutorials for publishers, agents, and students.



Access to Research

A decade of facilitating access to world-leading academic research

Access to Research makes it easy, free and convenient for anyone to access world-leading published academic research in libraries across the UK. The platform covers a broad spectrum of subjects, including science, health, art, engineering, and history, so users can find information relevant to their interests.

Users access the service by using a computer at their local participating public library. The platform has a user-friendly interface, meaning those who are not familiar with academic research can still easily navigate and locate articles.

Launched in 2014, the service aims to bridge the gap between academic research and the public. Providing free access to trusted research and scholarly articles, removes barriers that many people face when seeking to read high-quality research.

2024-25 in numbers*

38,000

User sessions

43 million

Articles currently available

110,000

User searches

15,000

Libraries offering service



Top 5

Journals accessed:

- Nature
- The English Historical Review
- Scientific American
- Scientific Reports
- The Journal of British Cinema and Television

Top 5

Location usage:

- London
- Redcar
- Manchester
- Edinburgh
- Bristol



Top 5

Subjects searched:

- History & Archaeology
- Engineering
- Sociology & Social History
- Psychology
- Medicine





Policy

Supporting rights holders and protecting copyright

Whilst the Labour Party now sit on the government benches, PLS policy priorities have remained as copyright and its relationship with artificial intelligence remained in sharp focus for legislators and in courts in the UK and across the world.

In December, the government launched an extensive consultation on copyright and AI, largely centering upon copyright and the use of content in training generative

AI models, an area that AI developers argue is 'uncertain'. Amongst the consultation's forty-seven questions, the government asked for views on its preferred option of the introduction of a package of measures that included a copyright exception with a rights reservation, alongside transparency requirements for AI models. Alongside over 11,500 respondents, PLS urged the government to prioritise transparency of AI models to provide a boost to licensing.

In parallel to the consultation, PLS joined over seventy organisations from across the UK's creative industries to form the Creative Rights in AI Coalition to help coordinate campaigning action against potential changes to copyright. The Coalition's 'Make it Fair' campaign was featured on the front page of every national newspaper and was also highly visible at this year's London Book Fair as well as other creative industry events.

PLS joined over seventy organisations from across the UK's creative industries to form the Creative Rights in AI Coalition to help coordinate campaigning action against potential changes to copyright.

Away from the consultation, Baroness Kidron led a valiant campaign in the House of Lords to amend the Data (Use and Access) Bill to include provisions that would oblige the government to introduce transparency measures for AI models. As of writing, peers have defeated the government five times on the inclusion of Baroness Kidron's amendments – with the support of PLS who have been in close contact with political stakeholders throughout the Bill's passage through parliament. Whilst the government has provided limited concessions to rebellious peers, it remains to be seen if they are willing to go further to reassure the creative industries.

With the outcome of the consultation, and developments in the US and EU, it is safe to say that the next year will likely be just as eventful and as consequential to the future of the UK's copyright regime.



External relations

Working with industry

PLS has once again been an active participant in industry events. From account review meetings at London and Frankfurt Book Fairs to events and conferences hosted by the ALPSP, IPG, PA, and PPA, as well as Publishing Scotland. PLS was also co-organiser of the 2025 Charles Clark Memorial Lecture, which moved to a bigger, better venue next door to London Olympia, where a sellout audience heard from Professor Emily Hudson from the University of Oxford.

The PLS Conference continues to go from strength to strength, with more than 200 attendees joining us for the 2024 event at 1 Wimpole Street in central London. The programme featured a keynote from publishing legend, Richard Charkin, alongside a range of expert speakers from across publishing and the wider creative industries, covering topics including copyright, content protection, and AI.

We have significantly refreshed our visual identity over the past year with the introduction of an updated logo and branding. The new design elements ensure each service has a clearer identity and incorporates themed illustrations into our branding, which has been rolled out across our website, social media channels, and all PLS marketing materials.

Finally, in March 2025, we relaunched our collective licensing service as 'PLS Collect', to ensure consistency across our services. As new technology drives the evolution of collective licensing and we look to meet the challenge of new demands for content, PLS Collect offers publishers a more comprehensive, easy to use service with the usual high standard of PLS customer service.



Special Projects

Supporting the industry through strategic partnerships

PLS is committed to supporting the publishing industry through not only effective licensing and copyright protection, but also by allocating a portion of any unspent operating income to support high-impact initiatives that provide significant benefits to publishers of all sizes across the industry. Below is a summary of the initiatives PLS has proudly contributed to over the last year.



Professional Publishers Association

PLS' continued support of the PPA Next Gen programme has been key to developing this initiative, which empowers emerging leaders and amplifies younger voices in the magazine media sector. Now in its second cohort, the PPA Next Gen Board, a formal subcommittee within the PPA Board, provides a platform for bright young professionals to shape the future of publishing and contribute to key industry decisions.

The Board focuses on trusted content, futureproofing revenues, and attracting new talent, with campaigns like Find Yourself in Publishing showcasing diverse career paths. The PPA's work has inspired other organisations to adopt similar models, driving lasting change in industry leadership.

www.ppa.co.uk



Publishers Association

PLS works with the Publishers Association on their vital content protection and enforcement work. Funding from PLS supports the Publishers Association's robust investigative and enforcement work to tackle unauthorised sites and networks.

This includes a recent successful High Court website blocking application and collaborating closely with law enforcement agencies to combat piracy and protect intellectual property rights across the industry.

www.publishers.org.uk



Association of Learned and Professional Society Publishers

Over 2023–2024, PLS funding enabled ALPSP to further enhance professional development opportunities. ALPSP's Mentorship Scheme continues to thrive with PLS' support. This initiative connects experienced mentors with early- and mid-career professionals across the publishing world, fostering invaluable knowledge exchange, skill development, and career growth.

They have also launched ALPSP Training OnDemand; this flexible online learning platform enables both members and non-members to access high-quality publishing training at any time and from anywhere.

Additionally, PLS funding has continued to support The Rising Star Awards, helping to shape the future of publishing by recognising and spotlighting emerging talent.

www.alpsp.org



Independent Publishers Guild

Support from PLS has helped the IPG to create a valuable picture of independent publishing and address urgent issues around AI and copyright. Our three-part Independent Publishing Report surveyed IPG members on their sales, workforces, social media use and other subjects. Among many insights, it highlighted the economic contributions and global reach of independent publishers and the growing diversity of their teams. It also helped the IPG understand members' pressing challenges and optimise our training.

The IPG's new CPD-accredited training on AI's ramifications for Intellectual Property and contracts promoted knowledge and best practice. Delivered by Mary Elliott of Fox Williams, it was a very well received practical guide to the steps publishers need to take in this fast-moving area.

www.independentpublishersguild.com

Income and expenditure 2024/25

	2025 (£)	2024 (£)
Copyright fees received	52,962,226	50,207,372
Distributable to rightsholders	(49,822,456)	(47,487,682)
Administrative expenses	(3,015,473)	(3,017,545)
Operating surplus	124,297	(297,855)
Other interest receivable & similar income	352,478	297,855
(Deficit)/surplus before taxation	476,775	-
Taxation	127,028	124
Surplus for the year	349,747	(124)
Retained earnings brought forward	822,473	822,597
Retained earnings carried forward	1,172,220	822,473

Balance Sheet (as at 31 March 2025)

	2025 (£)	2024 (£)
Fixed Assets		
Tangible assets	76,804	10,709
Intangible assets	215,488	88,446
Investment in Joint Venture	-	-
	292,292	99,185
Current Assets		
Debtors	1,869,511	1,560,687
Short term bank deposits	5,159,255	4,149,313
Cash at bank and in hand	4,984,792	6,862,246
	12,013,558	12,572,246
Creditors: amounts falling due within one year	(11,085,638)	(11,834,364)
Net current assets	927,920	737,882
Provisions for Liabilities	(47,992)	(14,594)
TOTAL NET ASSETS	1,172,220	822,473
Capital and Reserves		
Profit and Loss Account	1,172,220	822,473

The PLS team (as at 31 March 2025)



Tom West
Chief Executive



Danielle Williams
Executive Assistant
& Company
Secretary



Amy Ellis
Head of Rights &
Licensing



Will Crook
Head of Policy &
Communications



Caristia Villanueva
Permissions
& Operations
Administrator



Amy Byrne
Publisher Relations
Executive



Andrea Graham
Publisher
Registrations
Executive



Martin Dixon
Development and
Data Manager



Richard Guest
Head of Distributions



**Mohammed
Anisuzzaman**
Head of IT



Katherine Wyatt
Account Services
Manager



Kirsty Cassia
Account Services
Executive



Esme Lee
External Relations
Manager



Jamie Allerton
Publisher
Registrations
Executive



Andy Martin
HR Director



Claire Rogers
Head of Finance



James Martin
Account Services
Administrator



**Natalia
Kornioukhova**
Product Manager



Helen Jennings
Product Manager



Carla Roda
Permissions
Executive



Nicola Stalley
HR Advisor
[Maternity leave]



Emilie Lewis
HR Advisor



Adnaan Rana
Management
Accountant



Vivienne Casey
Finance Assistant



Samehra Khan
Credit Controller



PLS Board of directors (as at 31 March 2025)



Rosie Glazebrook
Chair
PLS



Tom West
Chief Executive
PLS

PPA

Sajeeda Merali
Chief Executive
PPA

Matt Cianfarani
Managing Director
Mark Allen Group

Susan Voss
Legal & Compliance Director
Bauer Media

IPG

Bridget Shine
Chief Executive
IPG

Tim Williams
Managing Director
Edward Elgar Publishing

Helen Kogan
Managing Director
Kogan Page

ALPSP

Wayne Sime
Chief Executive
ALPSP

Deborah Dixon
Editorial Director
Oxford University Press

Sarah Fricker
Senior Group Legal Adviser
Institute of Physics (IOP) group

PA

Dan Conway
Chief Executive
PA

Andrew Freeman
Vice President,
Secondary Schools Portfolio
Pearson

Mark Walford
Executive Director,
Rights & Business Development
Sage Publications



A New Home for PLS

In December, following a period based in WeWork offices post-pandemic, we moved into a new long-term home at 6 Hays Lane, London Bridge, co-locating with the Copyright Licensing Agency (CLA).

The relocation marks a significant milestone for PLS with a strong strategic dimension: as well as bringing welcome stability for our team for the challenges that lie ahead, co-location with the CLA is already helping to foster the type of close collaboration that will be key as we continue to develop and innovate.



Publishers' Licensing
Services Limited

Email: pls@pls.org.uk

Call: 020 7079 5930

Visit: www.pls.org.uk