



Publishers' Licensing Services Annual Review 2025–26

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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 £49.3 million in 2025-26.

PLS is owned and directed by:



Introduction from the Chair

It is a privilege to introduce this year's Annual Review, my first as Chair of PLS. This has been another year of record revenues, once again well in excess of £50 million, and one in which PLS has made real progress in the development and market rollout of AI licensing solutions.

At a time of significant and ongoing disruption and uncertainty for the industry, PLS has continued to be proactive on your behalf, not only in the delivery of our core services but in taking every opportunity to champion the value of publishing, the creative industries, and the critical importance of the copyright framework that underpins and sustains them.

From a personal perspective, my first year as PLS Chair has been an energising and rewarding re-engagement with the industry in which I began my career, and at such a critical moment. In my contact with publishers and our other partners and stakeholders, I have been struck by the significance of what is at stake and the need for collective responses – whether through trade bodies, campaign groups, or collective management organisations like ours. Our own progress in AI licensing reflects both the pace of change and the importance of ensuring our sector is recognised and protected.

On governance, in 2025 we said farewell to Tim Williams of Edward Elgar Publishing after two terms of valued service on the PLS Board and welcomed Nicola Ramsey, Chief Executive of Edinburgh University Press, as his successor.

Finally, I would like to extend my sincere thanks to the PLS Board and PLS team for their diligence and focus over the course of the year, and to our partners at the Copyright Licensing Agency and NLA media access for their exceptional work in support of our shared mission. At a time of significant change, these trusted partnerships are critically important as we seek to capitalise on the opportunities that lie ahead.

Monisha Shah
Chair





Review of the year

A Message from the CEO

This year, PLS distributed more than £49 million to publishers – our strongest performance to date, and a 5% increase on the previous year. It is the latest chapter in a period of sustained growth that has seen distributions rise by more than 35% over the past five years.

That growth rests on what has been built steadily over many years: long-established licensing frameworks, trusted relationships with our partners, and a shared recognition of the inherent value of published content. At the heart of that system are principles of consent, fair reward, and respect for copyright that are now being tested in ways that few could have anticipated at the start of the decade.

Responding to that pressure means building on those foundations with innovation – ensuring that collective licensing models remain relevant in a developing market.

“While longer-term policy and regulation, both in the UK and globally, remains unclear, PLS is committed to supporting publishers through the development of practical, market-led licensing solutions”

In last year’s annual review, I noted the concern and deep sense of frustration felt by publishers over the appropriation of their content by AI companies without permission or payment. These feelings were clearly reflected in the published outcome of the government’s consultation on AI and copyright, where an overwhelming majority of respondents roundly rejected any approach that would weaken the UK’s existing copyright framework.

Over the past year, in conversations with publishers across the industry, large and small, I have seen that position remain as strong as ever. I have also seen a genuine willingness to develop economic models in which AI and the creative industries can work together sustainably.

While longer-term policy and regulation, both in the UK and globally, remains unclear, PLS is committed to supporting publishers through the development of practical, market-led licensing solutions, and through acting as a convenor – encouraging dialogue across the creative industries on the issues that matter most to rights holders.

“The pace of technological change shows no sign of slowing, and the concerns I noted in last year’s review remain as live as ever. It is PLS’ responsibility to keep pace – and, where appropriate, to lead – in supporting you, grounded in transparency and accountability.”

At the London Book Fair in March, we launched our campaign inviting publishers to opt into a collective AI licensing solution for training, fine-tuning and RAG. This will offer AI developers – from LLM providers to enterprise users – legitimate, lawful access to high-quality content while enabling publishers of all sizes to access the developing AI licensing market. The response has been overwhelmingly positive and we would encourage those that have not yet opted in to do so.

We have also worked to address the end use of content in AI tools. Working with our partners at the Copyright Licensing Agency (CLA) and collective management organisations

representing authors and visual artists, AI Workplace licensing was launched to existing corporate and public sector licensees in May 2025, with first payments to over 700 participating publishers in March 2026.

While AI has dominated much of our development and policy work this year, the PLS team has remained focused on delivering for publishers across our full range of services: monthly distributions through PLS Collect, with more than 14,000 individual payments over the course of the year; the continued growth of PLSclear, now with almost 600 participating publishers; and Access to Research, which provides free access to published research for public library users across the UK – another tangible demonstration of the contribution publishers make to society.

The year has seen some notable changes in senior leadership and governance at both PLS and CLA. In May we said farewell to Rosie Glazebrook after serving two successive terms as PLS Chair; in July, CLA’s long-serving CEO Mat Pfleger announced his retirement. We welcomed Monisha Shah as incoming PLS Chair in June, and Simon Hutson joined as CLA CEO in February.

I take this opportunity to offer sincere thanks once again to our licensing partners CLA and NLA media access for their excellent work on our behalf; to the PLS Board; to our trade association members; to the PLS team for their hard work, dedication, and commitment throughout the year; and finally to all of the publishers that have worked with us this year. The pace of technological change shows no sign of slowing, and the concerns I noted in last year’s review remain as live as ever. It is PLS’ responsibility to keep pace – and, where appropriate, to lead – in supporting you, grounded in transparency and accountability.

Tom West
CEO

PLS Collect

Our collective licensing service

PLS Collect provides publishers with direct access to UK and international collective licensing. Our service enables publishers to easily manage and track licensing via a user-friendly platform, with regular payments when content is used. Registered publishers also benefit from responsive helpdesk support and regular licensing updates. Our team works closely with our trusted licensing partners, CLA and NLA, to oversee and develop effective collective licensing solutions.

Licence development

We have worked closely with publishers and our licensing partners to ensure that collective licensing continues to evolve with the rapid technological advancements and changes in content usage trends. In May 2025, following a PLS publisher opt-in campaign, CLA introduced an extension to its Business and Public Sector licensing that enabled licensees to use opted-in content as prompts for AI tools.

In March 2026, following extensive consultation with publishers and our partners at CLA and Authors' Licensing and Collecting Society (ALCS), we introduced a pioneering collective licensing solution for the use of content in generative AI systems, covering training, fine-tuning, and retrieval-augmented generation (RAG). Designed to complement direct licensing on an opt-in basis, the licensing provides publishers of all types and sizes with a convenient, practical way to participate in the AI economy under clear and transparent terms, and to receive fair remuneration.

Our development work continues, with further consultation with publishers and licensing agents throughout 2026.



PLS Collect

Highlights

2025–26 in numbers

£55.1m

Gross revenue from collective licensing was up 5.7% at £55.1m.

£49.3m

£49.3m was paid out to publishers.

96%

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

14,000

14,000 individual publisher payments over the course of the year.

PLS Collect

Revenue and distributions

Gross revenue from collective licensing was up 5.4% overall with growth across all sectors.

Education

Education revenue was up 2% with multi-year agreements already agreed and others under negotiation in Schools, Further Education, and Higher Education.

Public Sector

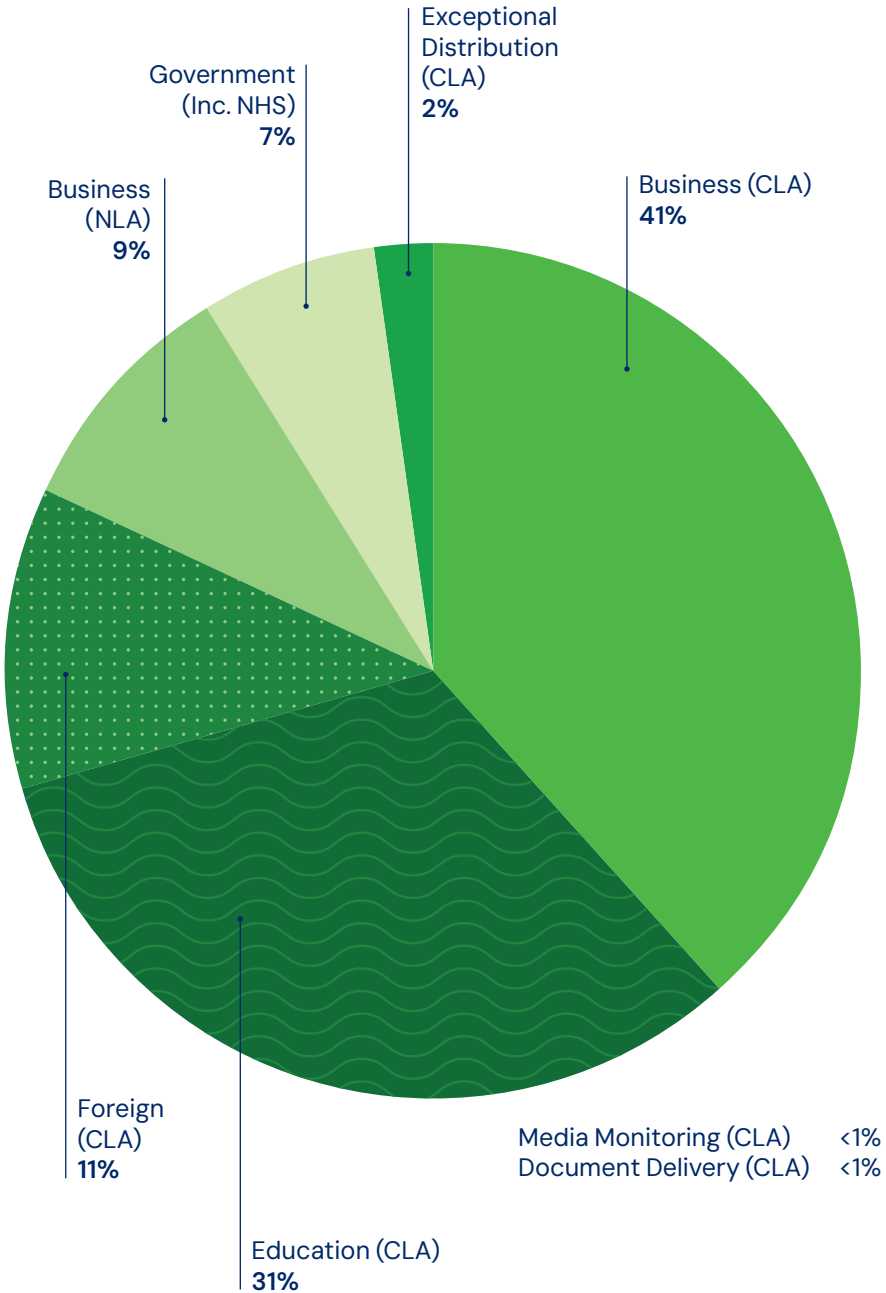
Public Sector revenue was up 10% for Central Government and Local Authorities licensing, and 1.8% for NHS. This year, CLA introduced Workplace AI rights into licences for Local Authorities from May 2025 that allow ad hoc use of content as prompts in AI tools.

Business

Business revenue was once again the main driver of revenue growth, up 9% for CLA licensing and 7% for NLA. CLA also introduced Workplace AI rights into the business licence from May 2025. PLS paid out the first Workplace AI payment to publishers who have opted in to these new rights in March 2026.

Type of Use	Revenue £
Business (CLA)	£22,384,447
Education (CLA)	£17,230,189
Foreign (CLA)	£5,835,479
Business (NLA)	£4,857,911
Government (inc. NHS)	£3,821,463
Exceptional Distribution (CLA)	£571,507
- Media Monitoring (CLA)	£382,940
- Document Delivery (CLA)	£51,660

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.

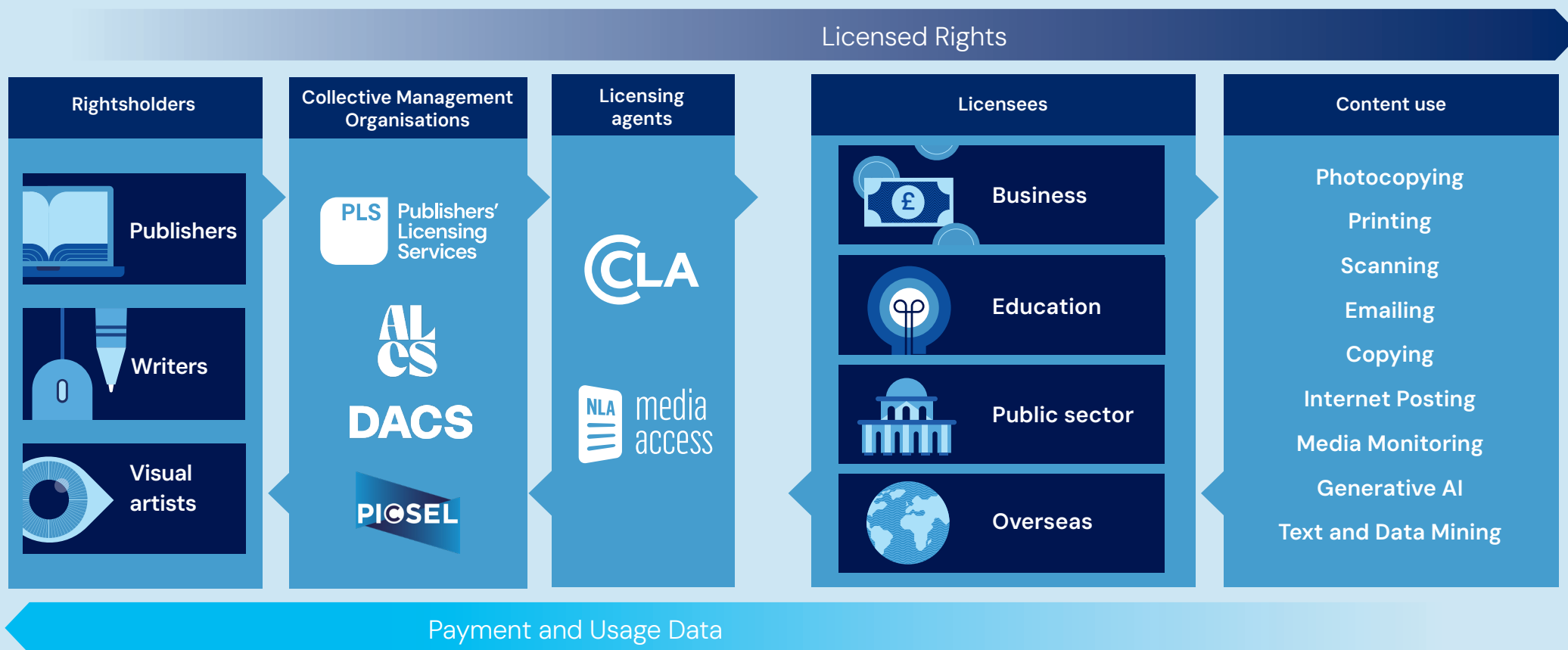


Collective licensing and our role

Representing publishers in the licensing ecosystem

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.

581 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 and more efficient. Permissions requests came from users in 108 countries, with 79% originating from overseas, highlighting the platform's international reach.

Several key developments were introduced this year to further support publishers and requestors using PLSclear, including the launch of new resources for editors and authors. We also introduced a generative AI chatbot for publishers, assisting them in real time with help desk queries. Alongside this, a new finance system has been integrated across PLS, improving internal processes and speeding up invoicing for customers.

Publishers using PLSclear by sector

Trade	30%	Education	15%
Academic & STM	25%	Professional	11%
Magazine	18%	Music	1%



Average response times:



Average response time: 11 days for first response



Submissions to licence: 17 days average response time

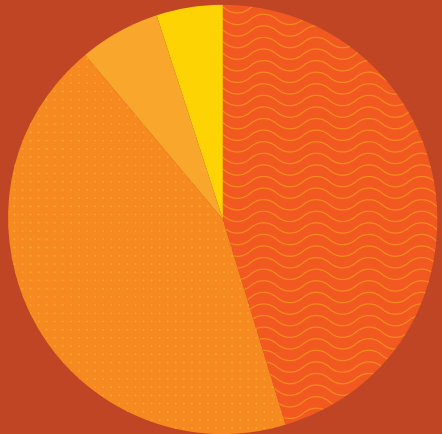
Top 5 territories licensed:

1. World
2. UK & Commonwealth
3. Japan
4. USA
5. China



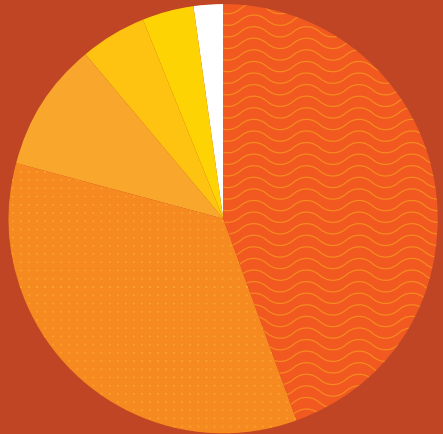
The publishing sectors which requests are coming from:

Education Institutions	46%
Commercial Publishers	44%
Self Publishers	5%
Charities and NGOs	5%
- Pharmaceutical	0.13%



Types of content being requested through PLSclear:

Prose	45%
Illustration	35%
Chapter	10%
Poetry	4%
Table	4%
Article	2%





Rights Management

Promoting the power of rights

We have continued to develop our rights management initiatives and services in 2025–26. 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 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 also 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 provides free, on-demand access to millions of academic articles in UK public libraries. It makes it easy for anyone to read publicly funded research, and helps publishers share content with researchers, students and others who might benefit from it.

The service opens academic research to a broad audience, supporting learning, skills development and everyday decision making. Covering subjects from science and health to arts and humanities, it allows users to explore reliable, peer-reviewed information across a broad range of topics. Access is available through participating public libraries, helping ensure people can use the service free of charge in their local community.

Since launching in 2014, Access to Research has helped people discover and use academic content in public libraries across the UK. It gives publishers a simple, secure way to make their content available to new audiences, while supporting wider public understanding of research and its relevance to everyday life.

34,000

User sessions

48 million

Articles currently available

100,000

User searches

4,000

Libraries offering the service



Top 5

Journals accessed:

- Nature (London)
- Scientific American
- The English Historical Review
- British Medical Journal
- Industrial Law Journal (London)

Top 5

Location usage

- London
- Redcar
- Manchester
- Birmingham
- Blackburn



Top 5

Subjects searched

- History & Archaeology
- Psychology
- Languages & Literature
- Mathematics
- Sociology & Social History





Policy

Supporting rights holders and protecting copyright

After reviewing the 11,500+ responses it received to a public consultation on copyright and AI, the UK government announced on 18 March 2026 that it was not to proceed with its preferred policy option of a copyright exception with an opt out.

The government's decision was the culmination of another year's intense activity around the future of the UK's copyright framework by PLS and the UK's creative industries.

An example of this action saw PLS CEO Tom West attend one of a series of roundtables to discuss copyright and AI organised by the government, co-chaired by the tech and culture secretaries that included representatives from the creative and tech industries.

The House of Lords was the epicentre of much of the political opposition to the government's preferred option, with crossbench peer Baroness Kidron spearheading a high-profile cross-party campaign to amend the Data (Use and Access) Bill to include rules requiring transparency of generative AI models. Although Baroness Kidron's efforts were ultimately unsuccessful, the government committed to publishing an economic impact assessment into the policy options provided in their consultation and a report into how copyright interacts with AI that were published in March 2026.

After reviewing the 11,500+ responses it received to a public consultation on copyright and AI, the UK government announced on 18 March 2026 that it was not to proceed with its preferred policy option of a copyright exception with an opt out.

PLS welcomed the government's decision to step back from a copyright exception, but what's next? The government will now commence four different workstreams: digital replicas, labelling of AI-generated content, creator control and transparency, and licensing for independent creative organisations. However, with no major AI legislation likely to appear in the 2026 King's Speech, it looks unlikely that future changes to either copyright or AI regulation will occur soon.

The AI/copyright question is a global one, with US courts dealing with a number of cases between AI developers and rightsholders, the Australian government ruling out a new exception for text and data mining, and the Indian government reviewing a proposal for statutory licensing for AI. Indeed, it may turn out to be the case that developments abroad reignite UK government interest in copyright reform over the next year.



External relations

Industry engagement and advocacy

The year saw continued development and expansion of PLS' external relations activity with our most successful PLS Conference to date, and the high-profile launch of our opt in campaign for the CLA's Generative AI Licensing Solution.

July's PLS Conference 2025, which took place at its now regular home of 1 Wimpole Street, London, attracted a record number of attendees from the publishing world. This year's sessions included a popular Introduction to Rights series, panels covering rights and policy, and a barnstorming keynote speech on the importance of protecting copyright from Karen Rønde, Chief Executive of the Danish Press Publications' Collective Management Organisation.

London Book Fair 2026 saw the launch of PLS' opt in campaign for the new CLA Generative AI Solution. With help from Cherish PR, the launch was highly publicised not only in trade media, such as The Bookseller, BookBrunch, and the Press Gazette, as well as more widely on BBC Radio and The Guardian. The launch was also accompanied at the Fair by a special CEOs panel, which included PLS CEO Tom West, ALCS CEO Barbara Hayes and new CLA CEO Simon Hutson, that discussed the development and aims of the new scheme.

PLS' regular external relations commitments continued over the year with its sponsorship and support of major industry events, such as the IPG Spring and Autumn conferences, the ALPSP Conference, and the PPA Festival along with the Charles Clark Memorial Lecture, which this year was given by High Court judge Justice Arnold.

Next year, London Book Fair moves across the city to Excel London; we look forward to embarking on this new chapter for our industry.



Industry partnerships

Special Projects supported by PLS in 2025–26

In addition to the services delivered directly to publishers, PLS partnered with its four member trade associations to facilitate services and initiatives designed to support and develop the UK publishing industry and to further PLS' strategic aims. A designated fund of £100,000 was shared equally between the four project leaders.



Association of Learned & Professional Society Publishers

PLS' support enabled ALPSP to create a specialised set of training modules focused on applying artificial intelligence (AI) within academic publishing. Hosted on ALPSP's Training OnDemand platform, these modules cover topics such as ethical considerations, operational efficiencies, content generation, and rights management in the context of AI. This initiative provides actionable insights to publishing professionals and enhances industry-wide understanding of AI's potential.

With PLS' support ALPSP have also been able to refresh and updating existing ALPSP Careers Hub material to reflect current industry trends and create new educational videos tailored for early-career professionals.

www.alpssp.org



Independent Publishers Guild

With PLS' support, the IPG have been able to develop training resources for IPG members as well as publishers registered with PLS. This training is tailored towards independent publishers for improving rights sales and management. Included in these tailored training resources is an updated programme of CPD-accredited training addressing copyright and rights protection in the age of artificial intelligence.

The training provides a clear overview of current copyright law as it applies to AI, guidance on the legal lifecycle of content, and practical advice on mitigating copyright and AI-related risks. It also explores evolving government policy, consultations, and the role of collective licensing, incorporating key developments from PLS and CLA.

www.independentpublishersguild.com



Professional Publishers Association

With PLS' financial backing, the PPA's Next Gen initiative supports the repositioning of magazine media under the unifying framework of "Trusted Editorial Brands." The project delivers a foundation for collective industry positioning and demonstrates the reach and brand value of magazine media. It strengthens how the industry presents its contribution to government stakeholders, highlighting the investment required to sustain quality journalism.

The initiative also emphasises the importance of robust rights management and rights sales to future collective licensing, while reinforcing the sector's commitment to combating misinformation and ensuring brand safety in an evolving media landscape.

www.ppa.co.uk



Publishers Association

PLS continues to support the Publishers Association's high-impact investigative and enforcement activity to combat online piracy and protect publishers' content. Building on existing initiatives, the programme targets a broader range of infringing sites and networks including Anna's Archive, Oceanofpdf and WeLib, which collectively attract over two million monthly visits from UK users.

A key output of this work is the development of a comprehensive, up-to-date intelligence archive on the principal piracy threats facing the publishing sector. Combined with coordinated action and intelligence-led investigations, this project plays a vital role in protecting copyright, safeguarding revenues, and reinforcing the value of lawful access to published content.

www.publishers.org.uk

Income and expenditure 2025/26

	2026 (£)	2025 (£)
Copyright fees received	55,884,439	52,962,226
Distributable to rightsholders	(52,634,484)	(49,822,456)
Administrative expenses	(3,314,678)	(3,015,473)
Operating surplus	(64,723)	124,297
Other interest receivable & similar income	373,278	352,478
Interest payable	(38,820)	–
(Deficit)/surplus before taxation	269,735	476,775
Taxation	(69,769)	(127,028)
Surplus for the year	199,966	349,747
Retained earnings brought forward	1,172,220	822,473
Retained earnings carried forward	1,372,186	1,172,220

Balance Sheet (as at 31 March 2026)

	2026 (£)	2025 (£)
Fixed Assets		
Tangible assets	83,896	76,804
Intangible assets	167,507	215,488
Investments	250,000	–
	501,403	292,292
Current Assets		
Debtors	1,803,578	1,869,511
Short term bank deposits	5,108,471	5,159,255
Cash at bank and in hand	7,803,499	4,984,792
	14,715,548	12,013,558
Creditors: amounts falling due within one year	(13,804,803)	(11,085,638)
Net current assets	910,745	927,920
Provisions for Liabilities	(39,962)	(47,992)
TOTAL NET ASSETS	1,372,186	1,172,220
Capital and Reserves		
Profit and Loss Account	1,372,186	1,172,220

Commentary: The financial information on this and the previous page does not constitute statutory accounts as defined in Section 434 of the Companies Act 2006. The income and expenditure account and the balance sheet have been extracted from the audited statutory accounts for the year ended 31 March 2026. These accounts have been delivered to the Registrar of Companies and carry an audit report, which was unqualified and did not contain a statement under Section 495(4) of the Companies Act 2006.

The PLS team (as at 31 March 2026)



Monisha Shah
Chair



Tom West
Chief Executive



Danielle Williams
Executive Assistant
& Company
Secretary



Amy Ellis
Head of Rights &
Licensing



Nicola Stalley
HR Advisor



Caristia Villanueva
Permissions
& Operations
Administrator



Amy Byrne
Publisher Relations
Executive



Andrea Graham
Publisher
Registrations
Executive



Will Crook
Head of Policy &
Communications



Richard Guest
Head of Distributions



**Mohammed
Anisuzzaman**
Head of IT



Katherine Wyatt
Account Services
Manager



Martin Dixon
Development and
Data Manager



Esme Lee
External Relations
Manager



Jamie Allerton
Publisher
Registrations
Executive



Andy Martin
HR Director



Kirsty Cassia
Account Services
Executive



James Martin
Account Services
Administrator



**Natalia
Kornioukhova**
Product Manager



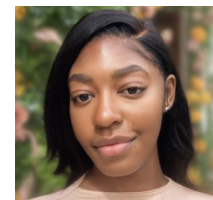
Helen Jennings
Product Manager



Claire Rogers
Head of Finance



Sharan Kaur
Financial Accountant



Charlotte Hanson
Publisher Relations
Administrator



Carla Roda
Permissions
Executive



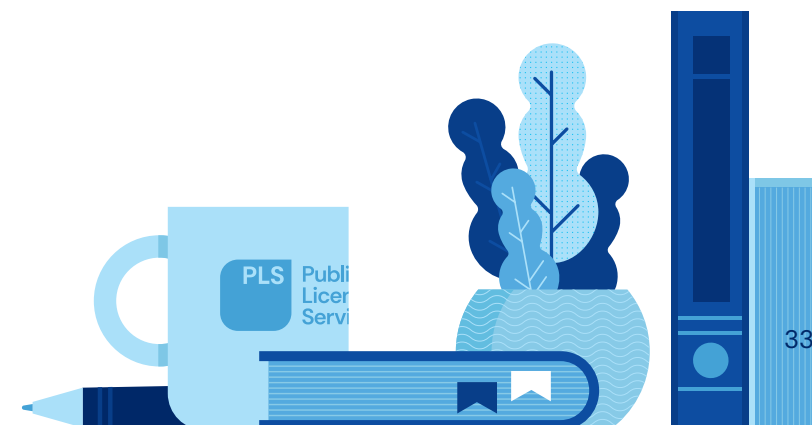
Adnaan Rana
Management
Accountant



Vivienne Casey
Finance Assistant



Samehra Khan
Credit Controller



PLS Board of directors (as at 31 March 2026)



Monisha Shah
Chair
PLS



Tom West
Chief Executive
PLS

Professional Publishers Association



Sajeeda Merali
Chief Executive
PPA



Matt Cianfarani
Managing Director
Mark Allen Group



Susan Voss
Legal & Compliance Director
Bauer Media

Independent Publishers Guild



Bridget Shine
Chief Executive
IPG



Nicky Ramsey
CEO
Edinburgh University Press



Helen Kogan
Managing Director
Kogan Page

Association of Learned & Professional Society Publishers



Wayne Sime
Chief Executive
ALPSP



Deborah Dixon
Editorial Director
Oxford University Press



Sarah Fricker
Senior Group Legal Adviser
Institute of Physics group

Publishers Association



Dan Conway
Chief Executive
PA



Andrew Freeman
Vice President, Secondary
Schools Portfolio
Pearson



Mark Walford
Executive Director,
Rights & Business
Development
Sage Publications



Publishers' Licensing
Services Limited

Email: pls@pls.org.uk

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Visit: www.pls.org.uk